



Wiki Education

2018–19 Annual Plan

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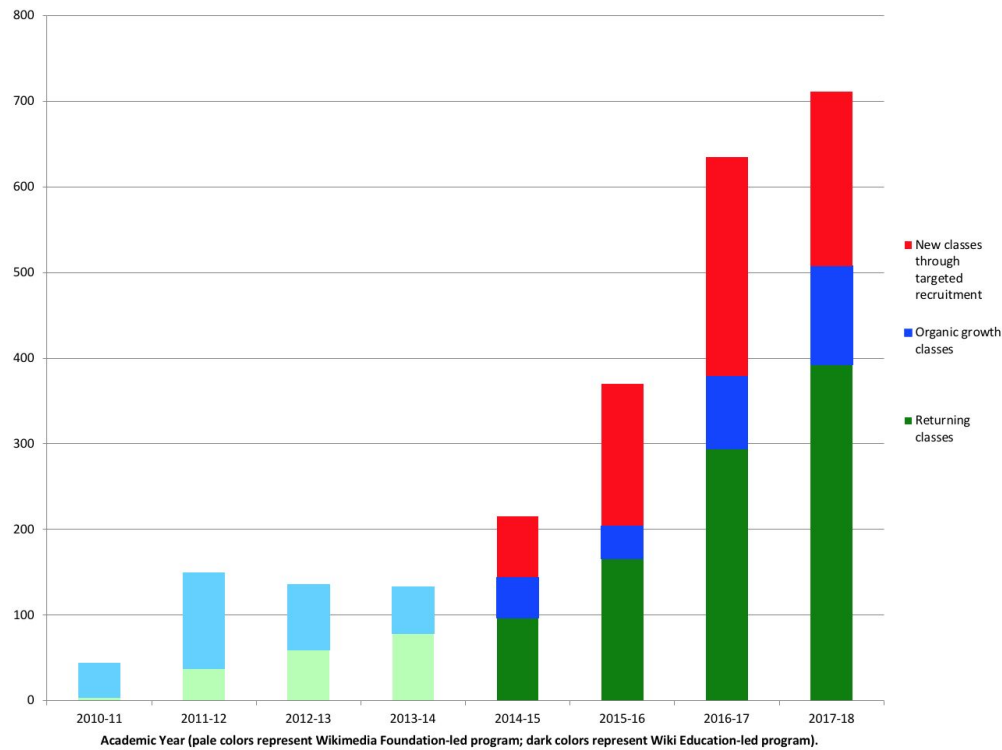
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Looking back: 2017–18

Summary of 2017–18 Performance

Over the course of the past four years, Wiki Education has experienced a tremendous growth in programmatic impact. This year alone, a small staff of 12 supported a total of 718 instructors and more than 15,000 students, resulting in 11.5 million words being added to underdeveloped content areas on Wikipedia. For the first time in the history of our organization, we had more returning than new professors (Figure 1), which is a strong indicator of the value instructors see in *Teaching with Wikipedia*.

Figure 1. Classroom Program growth 2010–2018



In January 2018, we started our *Future of Facts* initiative aiming at improving topic areas on Wikipedia that are essential for an informed citizenry in the United States. 160 of our 400 spring classes have been expanding the public’s access to reliable and trustworthy information in topic areas like public policy, political science, law, history, environmental science, and sociology. In order to bolster our capability of executing *Future of Facts*, we

signed three new partnership agreements with highly regarded academic associations, doubling our total number of *Future of Facts*-related partnerships from three to six.

In April 2018 we reached a significant milestone: after eight years of *Teaching with Wikipedia*, students enrolled in our program added more than 44 million words to Wikipedia, eclipsing the amount of information available in the last print edition of *Encyclopædia Britannica*. With people relying increasingly on Wikipedia when it comes to the trustworthiness and accuracy of facts, we're tremendously proud of this achievement.

From the moment we spun our programs off in 2013–14 and started Wiki Education as an independent organization in San Francisco, we've seen a breathtaking growth of 440% in the number of classes we've been supporting year after year (Figure 1). Yet, our revenue hasn't grown nearly at the same rate. That's why, in fiscal year 2017–18, we spent a substantial amount of effort and time on developing a new strategy, including a plan for tapping into new sources of funding. As a first result, we were able to sell our first *Topic Sponsorship*, a concept that builds on the idea that some foundations and individuals are interested in seeing Wikipedia content in their special interest area grow. We also laid the groundwork for the exploration of our new *Selling Services* model (more information in the "2018–19 Plan" section of this document) that aims at tying our programmatic growth to a sustainable source of earned income.

Finally, with our new *Wikipedia Fellows* program, we made a long-standing dream come true: to recruit and empower academic subject-matter experts as contributors to Wikipedia. For so many years, we were told that no serious academic would want to contribute to Wikipedia – yet, the high interest in *Wikipedia Fellows* shows that tides have shifted and we're grateful to have played a leading role in this culture change at the intersection between the world's biggest encyclopedia and academia.

Activities, Goals, and Targets

Programs

Goal: Recruit new program participants, with an emphasis on sustaining our science impact and increasing our impact in topic areas relevant to the Future of Facts campaign

In fall 2017, we investigated the efficacy of various outreach forums we use to recruit new instructors into the Classroom Program, and found that conferences are the most reliable way to produce active courses. When those conferences are related to one of our educational partners, they're even more effective. This confirms we should continue our current strategy of recruiting potential program participants at partners' conferences. One goal this fall term was to lay the groundwork to recruit more courses related to our *Future of Facts* and *Communicating Science* initiatives, so we attended conferences in sociology, political science, American studies, women's studies, anthropology, and geophysics. In the spring 2018 term, we supported 160 courses related to *Future of Facts*, which represents 40% of all supported courses. We supported 228 courses in our *Communicating Science* initiative, which means 60% of our courses that term edited Wikipedia articles related to science.

The outreach team is responsible for onboarding new instructors in the Classroom Program to set them up for success. We revamped the mandatory online orientation for first-time instructors to reflect our updated recommendations about teaching with Wikipedia. In the fall 2017 term, we supported 143 courses taught by new instructors, and we increased that number to 172 in the spring term. We believe we can continue recruiting 165 courses taught by first-time instructors in the Classroom Program with our current level of support resources.

In order to sustain our programmatic growth over the long term, we started three new partnerships with: the American Studies Association, the National Communication Association, and the American Anthropological Association. This fiscal year, 100% of the partner organizations we asked to participate in the *Wikipedia Fellows* pilot or program participated, proving it is a viable program for engaging academic associations.

Goal: Explore engagement opportunities with campuses to build a foundation for long-term programmatic growth

In 2017–18, we investigated ways to create more on-campus sustainability for our programs. We continued traveling to university campuses for outreach activities when the university paid travel expenses and gave Wiki Education an honorarium, and we recommend this as a continued practice. We also dedicated some time this year to supporting, both in-person and remotely, Faculty Learning Communities at Fordham University, Xavier University of Louisiana, and with "Bodies in Translation", a grant-funded

research project that partners 12 academic institutions to blend theories and practices of disability arts, feminist arts, and community arts. While we supported some courses in these efforts, we did not see significant growth in our programs from this type of engagement. Both of these types of outreach require staff time and have not recruited as many program participants as several other outreach methods, so we will not make either a core part of our outreach efforts in the future.

Goal: Conduct communications and process audit to ensure efficient use of staff resources

In summer 2017, we evaluated our outreach communications to potential program participants. We aimed to ensure cohesive messaging about Wiki Education programs, and we identified opportunities to create new mass emails to answer common requests. We were in the process of focusing on identifying high-quality courses for the Classroom Program, so we reframed outreach messaging to reflect this shift. We streamlined messaging and updated email templates in Salesforce, helping us respond more efficiently to new interest in programs.

Goal: Mentor global Wikimedia education leaders

The global education community looks to Wiki Education for guidance, expertise, and support. In June 2017, Wiki Education joined education program leaders from around the world in submitting an application to develop a User Group. The goal was to collaborate in developing resources and strategies for advancing efforts to bring Wikipedia and education together. To date, the Affiliations Committee still has not approved or denied the Wikipedia & Education User Group. Thus, though Wiki Education has endorsed this plan, the group has not worked together during this fiscal year.

Several Wiki Education staff attended Wikimania 2017 to meet with other education leaders and community members, including presenting about our successes, failures, and learning outcomes.

Goal: Explore new kind of expert engagement for program participants and members of partner organizations

In the past four years of partnering with academic associations to improve Wikipedia, several have indicated an interest in teaching their own members how to edit Wikipedia, bringing rigorous academic expertise to articles important to their discipline. Academic associations have previously tried teaching members via Wikipedia edit-a-thons at conferences or online. Wiki Education saw an opportunity to tap into this energy and bring

experts to Wikipedia. However, since we believe it takes more time to understand Wikipedia than an edit-a-thon affords, we developed a pilot program, Wikipedia Fellows, that would mirror our successes in the Classroom Program. We invited three of our most active partners, the National Women's Studies Association, the American Sociological Association, and the Midwest Political Science Association, to participate, recruiting three members from each organization. The partners saw value in training their members to make Wikipedia more accurate, as they understand that Wikipedia is where the public learns about topics related to their discipline. Most of all, partners were excited that the pilot was interdisciplinary, as their members would work closely with scholars from other backgrounds. At the end of the pilot, we determined this is a valuable way to bring rigorous, complex academic expertise to Wikipedia.

Goal: Determine data-driven approach to instructor retention

Consistently since we started Wiki Education in Fall 2013, 44.5% of the new instructors joining the Classroom Program return to teach again within one academic year. This is exciting because we've spent those years increasing the number of students and instructors we support, even though we've had approximately the same number of staff members supporting the Classroom Program. One of our priorities is to make the Classroom Program more efficient, scaling up the impact to Wikipedia while decreasing the cost per student. To see that the same number of instructors have a good experience and choose to incorporate Wikipedia into another course shows our success in the attempts to scale. In both terms this fiscal year, we supported more returning instructors than new instructors, a first for our program. Although there is a lot more to learn from retention, this is a great indicator that instructors who have pursued this assignment want to do it again.

We spent much of this fiscal year identifying indicators for high quality courses, creating a metric that takes into account quality of content, amount of content, and staff time devoted to each class. We identified which courses produce the best outcomes for Wikipedia, and focused our retention efforts on keeping those, while discouraging courses that had problems from re-engaging with this assignment. Initial results have shown this is has been a great way to scale the impact to Wikipedia without scaling the burden on our staff support systems.

Goal: Engage instructors to strengthen relationship with Wiki Education

To engage instructors we continued to offer office hours through 2017-18. These proved to

be excellent opportunities for instructors to share best practices, ask the Program Manager/Content Experts questions, and to put a face to the program since the majority of our interaction is through email or Wikipedia. Similarly, using our Desk.com ticketing system subscription (more below) has allowed the Wikipedia Content Experts to work more efficiently with instructors, students, and courses. Sharing incident reports and other significant student contributions has played a big role in improving communication among the Classroom Program team.

Sage also deployed new feedback/communication notifications to let instructors know when students began enrolling in courses. These kinds of notifications have freed up more time for the Classroom Program Manager as well as Content Experts to answer more in-depth questions about the assignment. Since this year has seen the largest enrollment of courses yet, these kinds of notifications along with increased communications have made it possible to provide high quality support to instructors at this scale. Template emails as well as mass mailings have helped maintain consistent communication with this large pool of instructors, but they have also freed up time to address issues classes have. These small group or one-on-one conversations are where our support has the biggest impact and where we can strengthen relationships with our instructors.

Goal: Expand existing Visiting Scholars program

We spent much of 2017-18 attempting to expand the *Visiting Scholars* program while maintaining the core goal of empowering existing Wikipedia editors to enhance their on-wiki work through access to sources. The dramatically varying schedules of sponsors and scholars made the attempt to create a cohort model for the program fail, which in turn caused the pre- and post- survey to be problematic. We struggled to meet our blog post goal, but we did create *Visiting Scholars* profiles on our website and on wiki. We also piloted the use of honoraria, and initial results (with an admittedly small sample size) showed that we were able to fill three open positions with qualified scholars significantly faster and with less staff time than for similar positions we'd recruited for without honoraria, suggesting that was an effective tool in our recruitment efforts. While our Scholars continue to do good work, and we value their contributions to Wikipedia, we concluded that this is not an easily scalable program, and we recommend decreasing staff time spent on it in future years.

Goal: Pilot alternative Visiting Scholars model with academic associations

As explained in the partnership section, we recruited academic experts from three

associations and created a weekly meeting structure to encourage them to contribute content to Wikipedia in their field of expertise. Our initial *Wikipedia Fellows* group included several very enthusiastic participants who made meaningful contributions to core articles in their discipline, or added sections relevant to their expertise in other core articles. We see significant potential for this program to scale, and we are excited to test a variety of options in program structure to determine the most effective way of scaling the Fellows program. In May 2018, we published a full evaluation report of the pilot on Meta: https://meta.wikimedia.org/wiki/Wiki_Education_Foundation/Wikipedia_Fellows_pilot_evaluation.

Program Support

Goal: Support continued program growth

Our main goals for 2017–18 were to keep our technical infrastructure up and running smoothly and support any emergent technical needs for our programs, without contracting externally for software development as in previous years. To that end, we completed major behind-the-scenes improvements of the course data update system, training translation system, email infrastructure, and many other performance improvements to allow us to keep up with increased usage on both Wiki Education Dashboard, and more dramatically, the global Programs & Events Dashboard. We made incremental progress on many aspects of the Dashboard user experience, kept up with security updates and software library upgrades, and achieved approximately 99.9% uptime for the Wiki Education Dashboard.

We also continued to actively foster an open source development community around the dashboard, mentoring four Outreachy and Google Summer of Code interns and accepting patches from more than two dozen new contributors.

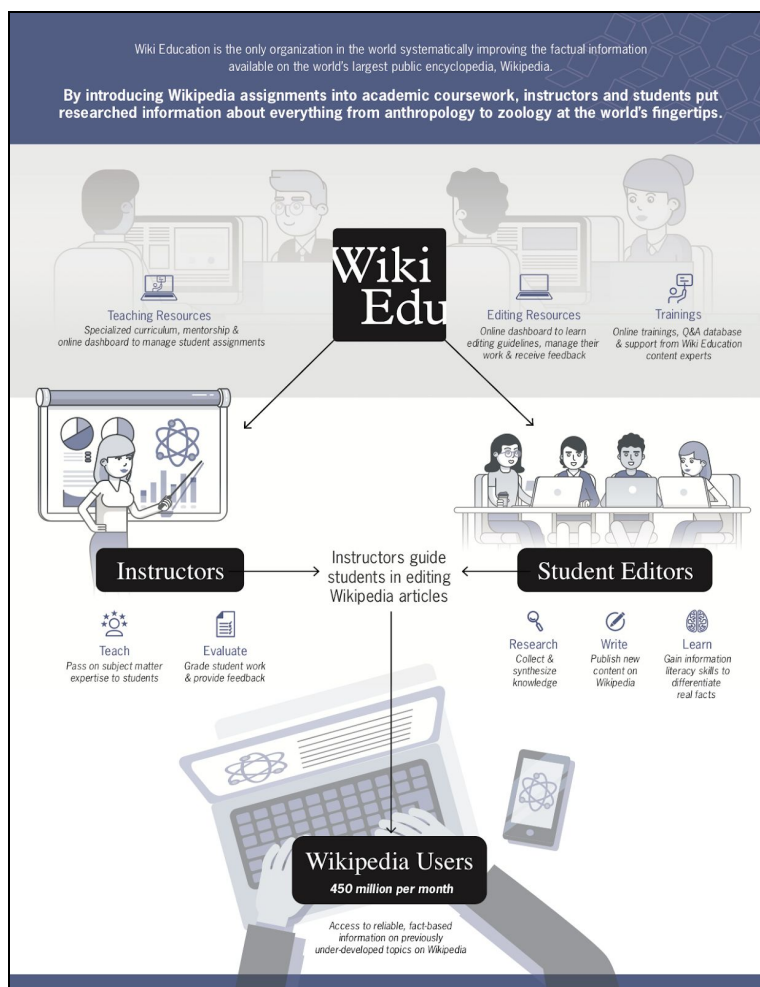
Goal: Develop ticketing system to track program participants' requests for help

In order to streamline the process of routing help requests from students and instructors to the right person, collaborating on tricky issues, and tracking our help requests more systematically, we implemented a ticketing system. After evaluating several vendors, we settled on Desk.com as the best option, and began using this system as our main tool for receiving and responding to help tickets in August 2017. This has met most of our requirements, although we anticipate building a fully integrated Dashboard-based ticketing system that serves our specific needs better in the future.

Goal: Establish brand identity separate from the Wikimedia Foundation

We engaged our brand identity consultant and communications firm to evaluate potential alternatives to the confusion surrounding our name. We determined that we would avoid using “Wiki Ed”, “Wiki Edu”, or “WEF” as a short name for our organization, drop the confusing “Foundation” from our name in all but legal documents, and try to go by “Wiki Education” in all references. We have updated our website and materials accordingly. In March, we worked with a design firm to create an infographic that explains the model of our Classroom Program, which we hope will clarify confusion that arises among potential funders, media, and prospective program participants.

Figure 2. Infographic explaining the model of our Classroom Program



Goal: Develop and enact communications campaign in support of Future of Facts campaign

Due to an early shift in priorities, we delayed the start of this communications campaign

until the fall of 2017. We created a page on our website about the *Future of Facts* initiative, collateral for fundraising purposes, and engaged a media firm to pitch storylines to news outlets. The firm was less successful than we had hoped, so we chose to wrap up this work early. We have begun engaging in creating speaking opportunities for senior leadership, which we hope will bear fruit in late 2018/early 2019.

Goal: Provide good ongoing support for programmatic initiatives

We published regular blog posts about Wiki Education's work, sharing our impact, learnings, travel, and stories throughout the year. The Communications Associate worked with the Outreach Manager and the Educational Partnerships Manager to revamp our onboarding page for new instructors: teach.wikiedu.org. We decided not to continue the newsletter engaging participating instructors as it wasn't showing signs of engaging instructor, and instead more purposefully engaged them in writing guest blog posts for us. We developed a sample assessment rubric, in response to instructor desire for a resource of this sort, as well as a Finding Articles training for students. The postcard to assist with outreach is projected to be produced in May.

Goal: Provide high-quality support from Wikipedia Content Experts

Our two Wikipedia Content Experts continued to provide high-quality support for program participants, including instructors and students. The two positions, one focused on the sciences and one focused on the humanities and social sciences, provided advice to new contributors on what articles are ripe for improvement, offered feedback on drafts that participants had started, and suggested ways to improve articles even more.

Our plan to evaluate the impact of Content Expert support on the quality of student work showed a weakly negative signal, because classes which performed poorly require most Content Expert support.

Goal: Begin developing Guided Editing functionality for automated student help

We still believe *Guided Editing* is a key technical project for our organization, but we were unable to secure funding for it so far in 2017-18. We will begin this project once we've secured funding.

Research and Academic Engagement

Goal: Continue Student Learning Outcomes Research

We anticipated that this project would be funded through a grant, and our proposal was unfortunately declined. While we still believe this work is important, we ranked it in lower priority than other projects because we deemed the report from last fiscal year's project sufficient for our immediate needs.

Impact Targets

Table 1. Impact targets for fiscal year 2017-18: goals and projected actuals.

Description	Goal	Projected actual	Notes
Number of students participating in the Classroom Program	15,000	15,000	We are particularly proud of projecting to meet this goal even after our shift to focus on quality meant we accepted many fewer large classes and classes doing small projects.
Number of Wikipedia articles improved	14,000	15,000	We project exceeding this goal by at least 1,000 articles improved.
Number of words added to articles	10.5 million	11.5 million	We believe our focus on quality courses will enable us to beat our goal by more than 1 million words.
Number of blog posts telling the story of Visiting Scholars impact	20	20	Meeting this goal was a challenge, another reason we've decided to decrease emphasis on this program next year.

Other targets

Launch of a ticketing system (December 2017)

We launched our new ticketing system in August, in time to put it to use for the entire fall 2017 term.

Creation of infographic explaining how Wiki Education effects change (August 2017)

Shifting priorities delayed this project, but we created this infographic in April 2018.

Produce discipline specific handouts on four additional topic areas (one per quarter)

We published a History brochure in September. Staffing vacancies delayed the second quarter brochure, but we published a Science Communication brochure in March and project to have brochures for LGBTQ studies and Cultural Anthropology published in June.

Figure 3. First page of our new "Science communication" brochure

Editing Wikipedia articles

Science communication

Editing Wikipedia can be daunting for newcomers, especially as a student editor contributing to Wikipedia for the first time as a class assignment. This guide is designed to help you create or expand articles about science on Wikipedia.

Engage with editors
Part of the Wikipedia experience is receiving and responding to feedback from other editors. Don't wait until the last day to make an article contribution, or you may miss out on important comments, advice, and ideas from others. Know that volunteers from the Wikipedia community might respond or ask questions about your work. If they do, make sure to acknowledge it. Discussion is a crucial part of the Wikipedia process.

Be accurate
Wikipedia is a resource millions of people use to inform themselves about the world of science. Your work for this class will be read by thousands of people, so it's important to be accurate.
By documenting and sharing facts about scientific topics, you'll help Wikipedia provide a wider spectrum of information about the world. With great power comes great responsibility!

Understand the guidelines
Take time to read and understand the suggestions here to make the most of your contributions to Wikipedia. If you post something that doesn't meet those guidelines, it may take up valuable volunteer time that could have been spent improving content.
If you aren't comfortable working within these guidelines, talk to your instructor about an alternative, off-wiki assignment.

Avoid close paraphrasing
Use your own words. Plagiarizing by copying-and-pasting is against the rules. Close paraphrasing, which is when most of the words are changed but the structure and meaning of the original text remains, is also not okay.
Plagiarism is a violation of your university's academic honor code. Plagiarism on Wikipedia will be caught by other editors, and there will be a permanent online record of plagiarism tied to your account. Even standard resources, such as descriptions in textbooks or abstracts in academic journals, are under copyright and should never be directly copied.
The best way to avoid plagiarism is to make sure you really understand your material, draw from a number of different sources, and write about it in your own words.

Be bold!
Everyone on Wikipedia wants to make it the best it can be. Take the time to understand the rules, and soon you'll be contributing important knowledge to a resource you and millions of other people use every day.

Wiki Edu

Publish 15 guest blog posts from instructors

As of March 31, we've published 18 posts by instructors and project that we'll publish an additional 7 by June 30, far exceeding this goal.

Feature of Wiki Ed in at least 50 external media articles

We project the amount of articles featuring our work will be more like 25–30. We struggled to get the kind of media coverage we wanted, and determined what we were getting from it was not worth the staff time and cost, so we discontinued this project.

Publish additional data about student learning outcomes

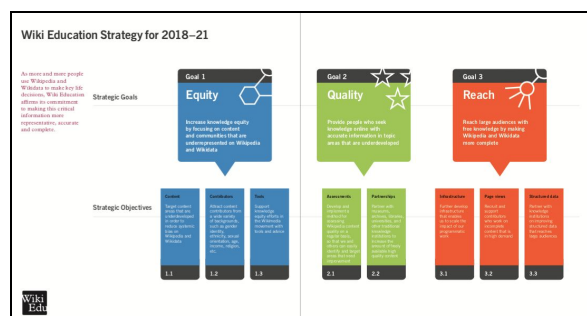
We did not receive anticipated grant funding for this project, so we did not complete it.

Strategic planning

Goal: Create a new strategic plan that sets the direction for the next three years.

After our last strategic plan expired in 2017, we embarked on building a new strategic plan at the beginning of fiscal year 2017–18. In July 2017, we formed a task force of two board members and two members of the senior leadership team that developed a road map for a year-long strategic planning process. In October, board and senior leadership gathered in Half Moon Bay, California, for a strategic planning kick-off meeting. The results of this initial meeting were summarized and presented back to the board which approved the general strategic direction in its January board meeting in San Francisco. Between February and May 2018, we created a three-year strategic plan document that will be presented to the board for approval in June 2018. Overall, the process for building our new organizational strategy went extremely smoothly and showed a high level of alignment between board, senior leadership, and staff.

Figure 4. Overview of the strategic direction in the first draft of our strategy booklet



Revenue, Expenses, and Staffing

Revenue

In terms of revenue, fiscal year 2017–18 has been difficult. The annual plan called for raising a total of \$2,738,000, which included \$750K in funding for an optional technical project called *Guided Editing*. Without *Guided Editing*, our revenue target was \$1,988K. During Q1 through Q3, we have received funds totaling \$1,554K and we’re projecting a total revenue of \$1,711K by the end of the fiscal year. One institutional grant totalling \$500K we had anticipated receiving at the end of Q4 we now expect to receive in early Q1 of next fiscal year, lowering our expected revenue this fiscal year but causing an increase in our projection for next fiscal year.

Table 2. Revenue breakdown by quarter, for fiscal year 2017–18.

	Q1	Q2	Q3	Q4 [1]
Revenue Total	\$381K	\$118K	\$1,055K	\$157K
<i>Foundations</i>	\$375K	-	\$501K	\$150K
<i>Individuals</i>	-	\$113K	\$554K	\$7K
<i>Board Giving</i>	\$6K	\$5K	-	-

Notes:

[1] Projections made based on actuals through May 31, 2018.

In the annual plan for this past fiscal year, we said that we expected institutional donors to be our main source of revenue in the near future. We planned to focus most of our efforts during the year on providing excellent stewardship to existing funders while building new relationships with foundations and individuals that are aligned with our mission.

Foundation grants continued to make up the majority (~65%) of our revenue. We secured a \$375,000 one-year renewal grant from the William and Flora Hewlett Foundation. We were also successful in obtaining a \$400,000 grant from the Wikimedia Foundation (\$233,000 of which were disbursed in fiscal year 2017–18), which was matched by the Stanton Foundation, one of our long-time supporters. In addition to that, we received an unexpected \$500,000 individual donation from the Pineapple Fund, a \$50,000 donation

from Craig Newmark, and a \$100,000 anonymous donation for our *Future of Facts* campaign in fall 2017.

In addition to specific dollar amounts, we set several other development targets and plans for fiscal year 2017–18. With few exceptions, we have accomplished or continue to make progress toward each of these goals, as shown in Table 3 below.

Table 3. Revenue targets for fiscal year 2017–18: goals and projected actuals.

Goal	Projected actual	Notes
Successfully complete a Wikimedia Annual Plan Grant application	Complete	\$400,000 Wikimedia grant awarded in December 2017, with full match from Stanton Foundation.
Increase awareness of our organization and its positive impact among individual and institutional prospects, leading to a minimum of \$500K in support of our <i>Future of Facts</i> campaign	Not Complete	We have raised \$100K as of January 2018, and have conversations ongoing with several other potential funders. The revenue through <i>Future of Facts</i> stayed far below our expectations. We'll have to do further analysis in order to find out what caused this discrepancy.
Maintain a positive relationship with our existing funders, resulting in at least one renewal of an existing multi-year grant at an increased funding level	Complete	We received an early renewal of our Hewlett Foundation general operating support grant in September 2017. We have confirmed that we will be receiving another renewal of this grant in September 2018, with a possibility of an increased amount.
Add at least two new institutional funders at a level of \$100K or above to our revenue stream	Complete (projected)	We have added Wikimedia Foundation and project to add the Heising-Simons Foundation before the end of the fiscal year.
Generate a minimum of \$750K support for tech projects that will enable us to keep pace with a growing number of instructors who use Wikipedia as a teaching tool	Not Complete	We have secured interest in funding this project from two major donors. However, likelihood of funding a portion of this project in fiscal year 2017–18 is only at about 20%.

Explore a fee-based model for additional services or software features	In progress	We have received initial funding from the Hewlett Foundation to support a contract with a consulting firm who can help us explore this issue. We expect to execute this project in Q1 and Q2 of fiscal year 2018–19.
Maintain 100% board giving	Complete (projected)	We expect to maintain 100% participation by our board members.

In early 2018, we also began exploring three new approaches to funding, *Topic Sponsorships*, *Fundraising Partnerships*, and *Selling Services*, after receiving approval and guidance from the Board in October 2017. These new revenue generating approaches are described in more detail in the section on revenue for fiscal year 2018–19 below.

Expenses

Last fiscal year’s plan called for spending a total of \$2,161K (without the spending on the optional *Guided Editing* project). When we realized that we would not fully hit our revenue goals, we lowered our expenses significantly early in the fiscal year. We delayed the refilling of two positions, delayed the start of several projects, and outsourced our financial services to SFBay Financials, an outside service based in San Francisco.

Table 4. 2017–18 Financials: Plan vs. Projection

	2017–18 Plan	2017–18 Plan (without <i>Guided Editing</i>) [1]	2017–18 Projection [2]	Variance projection vs. plan (without <i>Guided Editing</i>)
Revenue	\$2,738K	\$1,988K	\$1,711K	-14%
Expenses	\$2,428K	\$2,161K	\$1,875K	-13%

Notes:

- [1] The *Guided Editing* project was budgeted at \$750K in revenue and \$267K in expenses in this fiscal year.
- [2] Projections made based on actuals through May 31, 2018.

Staffing

During fiscal year 2017–18, we had several changes in staffing. Bill Gong and Adam Hyland left the organization to follow different career paths. We welcomed Ozge Gundogdu as Executive Assistant & HR Associate, Cassidy Villeneuve as Communications Associate, and Will Kent as the Interim Program Manager in fall 2017. Helaine Blumenthal started her maternity leave in December as she and her family welcomed their new baby Maxine. Will filled Helaine’s role as the Classroom Program Manager during her leave. Upon Helaine’s return in early April, Will transitioned into Ryan McGrady’s role of Community Engagement Manager on an interim basis, as Ryan started a 6-month unpaid leave to finish his Ph.D. dissertation.

Table 5. 2017–18 Staffing: Plan vs. Projection

	2017–18 Plan	2017–18 Actual	Variance from plan
Staffing	12 FTE	12 FTE	0%

Looking ahead: the 2018–19 Plan

Overview

During next fiscal year, we will focus heavily on generating more revenue and exploring new sources of funding, while keeping our core programmatic services running, gaining more impact from our Classroom Program while maintaining the same level of spending on it, and bolstering our technical infrastructure.

Exploring the new earned-revenue model *Selling Services* will be our answer to a widening gap between an ever increasing demand in our programmatic offerings and the limited amount of funding we are able to create through philanthropy. *Communicating Science* will both aim at improving Wikipedia's content in an underdeveloped content area and at attracting new funders that have the capability of offering substantial financial support. *Topic Sponsorships* and *Fundraising Partnerships* will be two additional ways of generating new revenue. During Q3 and Q4 of fiscal year 2017–18, we have laid the foundation for all of these four fundraising-related initiatives, and we are confident that all our hard work will come to fruition over the course of next fiscal year.

With an increasing number of people – enrolled in our own programs and globally – using our technical infrastructure, we will carefully start investing in our technical ability. Sage Ross, our longtime Product Manager, will head our new Technology department and hire our first full-time software developer in January if we hit all our revenue targets until then. This move will set us on a path for being a potential “Center of Excellence” for the Wikimedia movement and a reliable source of support for thousands of users of our Dashboard software.

Overall, fiscal year 2018–19 will be a year of transition for us. Our main focus will be on getting the organization ready for executing our new 3-year strategic plan. We will minimize our expenses in programs like *Visiting Scholars* that have failed to scale and slowly build our capacity in promising new approaches like the *Wikipedia Fellows* program. By generating new revenue streams and by improving our technical capabilities, we will create the pre-conditions that will be required to make the vision of our board and staff come true in the years to follow.

Key Initiatives in 2018–19

Selling Services

Since Wiki Education was established, we have relied primarily on philanthropic grants and other charitable donations to cover our operating expenses. While our organization experienced a steady 10–20% increase in programmatic growth year over year, this revenue stream didn't grow as fast as our program-related expenses have been growing. That's why, in 2018–19, we will actively explore and pilot a new approach to generating revenue that will align our programmatic growth with the growth of this new revenue stream. In this new *Selling Services* approach, we will be selling some of our core support services to universities and colleges that want to encourage their faculty to teach with Wikipedia to improve student learning.

We will secure funding for a consulting firm which will help us explore various potential fee-for-service models during the first two quarters of the fiscal year. In particular, these consultants will help us analyze the market potential for Wiki Education services, conduct a customer voice analysis to help us determine specific customer needs and opportunities, and work with us to develop a robust business plan that we can begin piloting in the second half of the fiscal year. We are not aiming to generate significant revenue from our *Selling Services* approach during the next fiscal year, but do intend to lay the groundwork for increased year-over-year earned revenue in the future. Enacting this new approach will require hiring a Business Developer on the Development Team with expertise in sales in higher education, which will help us to grow our programmatic impact proportional to the success of the *Selling Services* model in the future.

Communicating Science

Since we wrapped up the *Year of Science* initiative at the end of 2016, we've had even greater impact on science content on the English Wikipedia than we did during the initiative itself. That's because our Classroom Program model involves word of mouth, partnerships, and ongoing cultivation of new faculty, all of which have lasting impact far beyond a year-long initiative. In 2018–19, we expect this growth will continue, as we make an even

larger impact on the quality of science content to Wikipedia. We anticipate testing the *Wikipedia Fellows* program with science topic areas this year, improving the quality of highly read information on scientific topics. We will also continue to scale our push for more biographies of women in science to be added through our programs, adding equitable coverage of scientists to Wikipedia.

Support global programs through technology

Our Dashboard platform has proved stable and adaptable for meeting a wide range of staff and program participant needs over the last several years. This year, our technology work will focus on sustainability by reducing the short- and long-term maintenance burdens our digital infrastructure, consolidating peripheral tools into the Dashboard, and ensuring that it can be a firm foundation for continued scaling of existing programs and development of new features to meet the needs of new programs – both for Wiki Education and the global Wikimedia movement.

Activities, Goals, and Targets

Programs

EDUCATIONAL PARTNERSHIPS AND OUTREACH

Goal: Establish partnerships with educational institutions to help achieve strategy of improving Wikimedia content's reach, equity, and quality

In the coming year, we will continue partnering with academic associations whose members fit well into Wiki Education's programs. We will activate these partners to recruit their members and publish stories about our collaborations, as this has proven a reliable method of scaling recruitment long-term. This fiscal year, we expect to diversify the types of organizations that formally partner with Wiki Education. We will expand beyond academic associations to work with other mission-aligned institutions whose staff and members can improve Wikipedia or Wikidata.

Goal: Recruit program participants for all programs, focusing on Wiki Education campaigns and initiatives

We will continue outreach efforts throughout the fiscal year, recruiting new program participants and cultivating existing contacts to participate in a Wiki Education program. We will target participants related to the *Communicating Science* initiative and our strategic plan goal related to equity. We will direct our efforts toward recruiting Classroom Program instructors and *Wikipedia Fellows*, as well as recruiting the first cohort of instructors for the Wikidata pilot for fiscal year 2019–20.

Goal: Develop a model to encourage cross-program participation

Participants who already understand the Wiki Education model and align with our mission are one of the most valuable resources we have. That's why we believe they are primed to also participate in another program. We will investigate whether program participants from one Wiki Education program are willing to join an additional one. For example, we may recruit *Wikipedia Fellows* from our existing Classroom Program instructors or encourage a *Wikipedia Fellows* alumnus to teach with Wikidata. We will develop a communication strategy and processes to collaborate among program managers, then implement the plan. By the end of the fiscal year, we expect to have a better understanding of how existing program participants can engage across programs.

CLASSROOM PROGRAM

Goal: Deepen instructor interaction and retention for high-quality courses

In 2018–19, we will continue the efforts we began last year to identify and cultivate the retention of our best courses. We will further refine our formula identifying courses we want to retain, and create an instructor interaction and engagement plan to retain those courses.

Goal: Engage instructor focus group at WikiConference North America

In past years, Wiki Education has offered academic scholarships to WikiConference North America. While we have no influence on who receives the scholarships, many of our Classroom Program instructors' engagement with Wikipedia has led them to be awarded scholarships by the committee. Assuming this happens again this year, we would like to seize the opportunity and host an instructor focus group at WikiConference North America in Columbus, Ohio, in October. We will foster an atmosphere of idea exchange, identify improvements to the Classroom Program support, and cultivate discussion among how to target, improve, and foster reach, equity, and quality through the Classroom Program.

Goal: Plan for a new pilot program to encourage students to contribute content to Wikidata as a class assignment

In spring 2019, Wiki Education will plan and hire for a small pilot program to determine best practices in assigning students to contribute to and query Wikidata as part of a university assignment. We will create a more robust plan and create the necessary environment so that in fall 2019, we can support courses in which students improve Wikidata items and gain key data literacy skills. Simultaneously, we will create an optional two-week supplement to our existing Wikipedia editing assignment to have students in our existing program also add to the Wikidata item for the Wikipedia article they've improved as part of their assignment.

WIKIPEDIA FELLOWS PROGRAM

Goal: Determine the highest impact model for scaling the Wikipedia Fellows Program

Following the success of the *Wikipedia Fellows* pilot, in 2018–19 we will work to expand, test, and evaluate the model in a number of ways. Over 20 distinct cohorts of fellows, we will vary several elements (number of cohorts active, number of fellows in a cohort, length of cohort's term, subject area of cohort, partnership model, Wikimedia project, meeting style, meeting frequency, and collaboration style) in order to evaluate our capacity to scale the program, to better understand interest in participation, to explore different kinds of partnerships, to hone new processes for working with academics, and determine our needs for future growth. We will be ambitious in planning for large numbers of cohorts and fellows, with the most ambitious numbers coming in the second half of the year, allowing for time to reassess after the first half and/or develop additional support infrastructure, such as training modules.

VISITING SCHOLARS PROGRAM

Goal: Switch Visiting Scholars program to reactive mode

For the last several years, we've attempted to sustainably scale the *Visiting Scholars* Program with only limited success. The *Wikipedia Fellows* Program grew out of the *Visiting Scholars* model as a more scalable alternative; given initial success of the pilot, we will redirect resources to the fellows program this year. We will continue to facilitate sponsor-scholar relationships and reactively create new positions if a qualified sponsor or scholar approaches us. But we will no longer actively promote the program or encourage program growth in order to minimize our expenses in this area.

WIKIPEDIA CONTENT EXPERTS

Goal: Continue to provide high-quality support for the Classroom Program while expanding support for Wikipedia Fellows Program

Our Wikipedia Content Experts answer questions, provide feedback, and otherwise support program participants, including student editors, instructors, and Wikipedia fellows. In 2018–19, we anticipate our team will support the largest number of participants to date. We have carefully analyzed the time demands of the Classroom Program, and prioritized *Wikipedia Fellows* Program activities during lulls in student editing. We will create streamlined systems and processes, including working with the Technology department to reduce bottlenecks in Content Expert workflows, to ensure high-quality support for all program participants during the term.

COMMUNICATIONS

Goal: Provide ongoing communications support for Wiki Education

Communications plays a key role in supporting all of Wiki Education's programs and projects. In 2018–19, we will publish regular blog posts about Wiki Education's work, sharing our impact, learnings, travel, and stories related to reach, equity, and quality in Wikimedia content. We will highlight participant-authored Wikipedia articles related to our strategy and our *Communicating Science* initiative on our blog and social media channels.

Goal: Create communications materials to recruit new program participants

As our educational partnerships and outreach team targets new program participants focusing on reach, equity, and quality, we will create communications materials in support of this effort. We will create and supply outreach materials (banners, one-pagers) used at conferences or in partnership meetings, publish and review articles about our programs in partner publications, develop materials specifically speaking to equity, and engage in recruitment activities on social media.

Goal: Develop and adapt resources for program participants

We've learned constantly updating the resources we've created based on participant feedback makes them more useful and reduces the amount of staff time we spend answering questions, making this a valuable ongoing effort. We've also determined our series of discipline-specific handouts remain popular reference tools, so we will add four

more titles in 2018–19. We'll also create new resources for the *Wikipedia Fellows* Program and start creating resources for the Wikidata pilot.

Targets

- Number of students participating in the Classroom Program: 16,500 (up from baseline of 15,000)
- Number of Wikipedia articles improved: 17,000 (up from baseline of 15,000)
- Amount of words added to Wikipedia: 15 million (up from baseline of 11.5 million)

Technology

Goal: Keep Dashboard platforms and other services running

As our programs continue to grow and expand in new directions, and usage of the global Wikimedia Dashboard continues to grow, it will require regular maintenance, monitoring, bug fixing, and performance optimization to keep both Dashboard platforms running smoothly with high availability. As part of the process of improving our Dashboard infrastructure, we will consider moving Programs & Events Dashboard off of wmflabs.org to our own hosting to match dashboard.wikiedu.org.

Targets

- 99.5% or greater uptime for dashboard.wikiedu.org and wikiedu.org
- Continued availability of Programs & Events Dashboard for global use

Goal: Provide mentorship to interns and other open source contributors

Supporting interns and volunteer open source contributors has been highly successful in the past year. The work of volunteers and interns, supported via mentorship and code review, allowed us to maintain a good pace of improvements and bug fixes for Programs & Events Dashboard without dedicated staff resources. Continuing to invest in making the Dashboard codebase accessible to newcomers, and mentoring for Google Summer of Code and Outreachy, makes sense again for next year. In addition to adding moderately to our capacity to maintain and improve the Dashboard codebase, these activities provide opportunities for Wiki Education staff to collaborate with Wikimedia staff and learn from a diverse community.

Targets

- Successful participation in Google Summer of Code and/or Outreachy in 2018–19
- Acceptance of code contributions from both new and returning volunteer developers during 2018–19

Goal: Support program needs through improving the Dashboard

Over the last several years we've identified a range of major features and technical projects, addressing a variety of bottlenecks and points of frustration for staff, instructors and students. With increased capacity for technical work this year, we will be able to accomplish some of these larger projects, and also respond flexibly to new needs as our programs grow and evolve. Before deciding which projects to prioritize, we will revisit process mapping of our main programs to see which bottlenecks are the most critical for scaling and might have technical solutions.

Targets

- Complete a process map for all active programs to identify bottlenecks and barriers that may have technical solutions
- Implement the highest-priority technical improvements identified in the process map

Goal: Begin development of Guided Editing (will only start once funding has been secured)

Last year we began developing the concept of *Guided Editing*, a major technical project that has the potential automate some of the key aspects of the Classroom Program that are currently bottlenecks to supporting more courses and students. If we can find funding for this tech project, we will build a development team and create an initial proof-of-concept within the Dashboard, providing guidance to help students avoid the most common errors and Wikipedia writing problems during the draft phase of their assignments. *Note: Dependent on appropriate funding.*

Targets

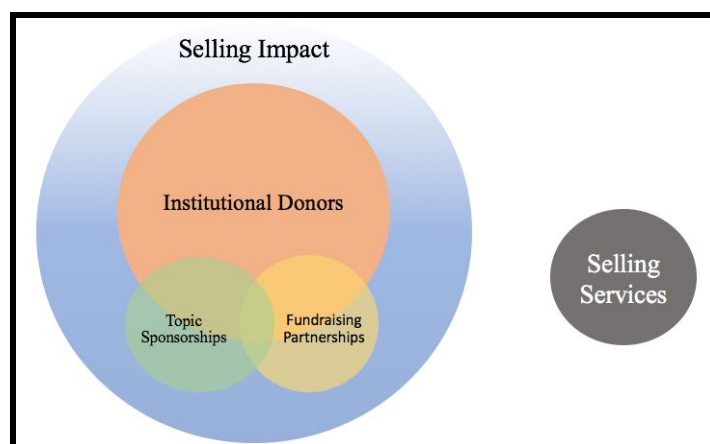
- Build out a development team for *Guided Editing* within two months of funding
- Begin user testing with prototypes to validate design plans within four months of funding
- Deploy an initial set of *Guided Editing* features for testing in the Classroom Program within ten months of funding

Revenue, Expenses, and Staffing

Revenue

As part of our strategic planning process, we have developed a fundraising strategy framework that will guide our development efforts in the next fiscal year and beyond (see Figure 2).

Figure 5. A revised fundraising strategy framework for Wiki Education showing two main approaches: *Selling Services* and *Selling Impact*.



There are two main components of our revised fundraising framework: *Selling Impact* and *Selling Services*.

SELLING IMPACT

In *Selling Impact*, we seek major gifts from foundations and other donors who believe in our impact on student learning and on improved Wikimedia content. In addition to our primary goal of seeking general operating support, it also calls for seeking funding for our specific program initiatives: *Communicating Science* and *Guided Editing*. New funders in this component of our fundraising strategy will be found primarily through a network approach, with existing funders helping secure conversations with like-minded colleagues at other foundations.

We also plan to hold a networking event in Q1 or Q2 on the public understanding of science, in conjunction with the National Science Foundation and our existing science

funderson, to build awareness of Wiki Education's impact among other science funderson and the scientific community in general.

The *Selling Impact* component of our fundraising strategy also includes two new approaches that we are calling *Topic Sponsorships* and *Fundraising Partnerships*.

Topic Sponsorships. Most institutional donors take a very strategic approach to philanthropy. When funder strategies are well-aligned with Wiki Education's mission and impact, making a case for general and programmatic support has a high likelihood of success. However, foundation strategies also constrain opportunities with funderson when their strategic approaches don't align in traditional or obvious ways with Wiki Education's approach. This constraint exists even when funder interests clearly intersect with topic areas on Wikipedia that students in our programs work to improve. To attract some of these types of funderson, we will be appealing to their deep, topic-specific interests by highlighting the need for them to help ensure well-developed information about those topics is present on the world's most read source of information.

The *Topic Sponsorship* component of our fundraising strategy seeks annual gifts of \$50K+ to support ~200 students to improve Wikipedia in key topic areas, ranging from anthropology to linguistics to zoology. While we hope to find some topic sponsors through our growing funder network (including the networks of our board members), we will primarily be using a cold, but targeted outreach campaign to qualified potential funderson. To augment this effort, we will be using high-quality communication assets describing the work and impact of Wiki Education. In the next fiscal year, we are aiming to secure one new topic sponsorship each quarter.

Fundraising Partnerships. This component of our fundraising strategy involves formally partnering with other non-profit, grant-seeking organizations whose interests overlap significantly with the impact Wiki Education achieves in those interest areas. In this approach, we will work together with partners to co-develop proposals that include funding for both organizations and to identify potential funderson. A portion of the funds from these grants would pass through the partner organizations to support Wiki Education's efforts in the joint proposals. Wiki Education's role in such partnerships will be to leverage our Classroom Program to recruit faculty and support students to edit Wikipedia articles in content areas that are of interest to the partner organizations. In the next fiscal year, we are aiming to establish and secure funding for three partnerships.

As an example of early progress toward this goal, we have nearly finalized a partnership with the Library of America, which is a well-respected non-profit organization focusing exclusively on promoting American literature. In this partnership, Wiki Education will support students in American literature courses to improve articles about authors, works, and related topics. The Library of America will open doors and provide credibility to funders who care about literature, but who would not otherwise consider providing support to Wiki Education. The proposal will come directly from the Library of America, and will be framed as an innovative project at a well-respected organization within the literature field. Wiki Education's role in the proposal will be framed as a core technical partner to help the Library of America ensure information about American literature is well-developed and represented on Wikipedia.

SELLING SERVICES

The second major component of our fundraising strategy, *Selling Services*, is one we will be exploring and piloting during our next fiscal year. The two primary differences between our *Selling Services* and *Selling Impact* components are 1) the aspect of our work we are trying to "sell" and 2) the "customers" we are selling to. In our *Selling Impact* component, we are selling an opportunity to help students improve Wikipedia. Our "customers" in this approach are foundations and individuals interested in making a difference in the world, but who are not looking for direct benefits to themselves. In our new *Selling Services* component, on the other hand, we will be selling our core support services to universities and colleges that want to encourage their faculty to teach with Wikipedia to improve student learning. Our *Selling Services* component will involve a more traditional market-based approach to securing revenue than our *Selling Impact* component, which relies exclusively on philanthropy.

During the next fiscal year, our goal will be to secure \$160K in funding to allow us to hire a consulting firm which will help us explore various potential fee-for-service models. In particular, these consultants will help us analyze the market potential for Wiki Education services, conduct a customer voice analysis to help us determine specific customer needs and opportunities, and work with us to develop a robust business plan that we can pilot.

The first phase of the consultation, the market analysis, will include a high level overview of the target market and a synthesis of systemic and cyclical factors impacting the market. This analysis will result in the development of a competitive landscape and positioning

analysis, or market map. The market map will help us identify potential gaps or weaknesses in the market among competitors and also deliver insights into the sales cycles and go-to-market models of potentially competing products. This phase of the work will also provide information about preliminary market entry opportunities, including implications and hypotheses for the evolution of our current free offerings toward subscription-based offerings.

The second phase of the consultation, the voice of the customer analysis, will help verify the findings of the first phase through large-scale primary research. This phase will define specific questions and offering concepts to be further tested through interview-based and large-scale quantitative research with faculty and administrators. This research will result in further validation of customer-level tailwinds and headwinds facing our services and go-to-market efforts. It will also result in a forecasted revenue growth models and investment assumptions within the market based on customer insights. Most importantly, this second phase will determine the overall viability of a selling-services business model for Wiki Education.

If the first two phases of this consultation reveal a viable market and potential strategy, we will move into the third phase: business plan development. In this phase, data from the first two phases will be synthesized and applied to a set of recommended product and go-to-market strategies. We will also determine what gaps may exist for us in the market and the level of effort and resources necessary to address them. The key result of this phase will be a business plan that includes revenue scenarios, assumptions, investment risks, notable product requirements, pricing models, required resources for product development, and an anticipated go-to-market process.

Our goal is to complete the consultation and business plan development work in the first half of the next fiscal year and begin executing on the plan in the second half of the year. We are not aiming to generate significant revenue from our *Selling Services* approach during the next fiscal year, but do intend to lay the groundwork for increased year-over-year sustainable revenue ongoing into the future. Enacting this business model will require the hiring of a full-time staff member on the Development Team with expertise in sales in higher education in Q4.

Targets

As we enact this new fundraising framework, we will be working toward the following specific development targets in fiscal year 2018–19:

- Add at least one new institutional or individual funder at a level of \$200K or above in our general operating support revenue stream
- Add at least one new institutional or individual funder at a level of \$200K or above in our *Communicating Science* revenue stream
- Add at least one new institutional or individual funder at a level of \$250K or above to support our Wikidata Pilot project
- Generate two new topic sponsorships, totaling \$100K
- Establish fundraising partnerships with three organizations and acquire funding for proposed projects with at least two of these partners, totaling \$225K
- Successfully acquire renewal funding from the Wikimedia Foundation
- Maintain a positive relationships with our existing funders, resulting in at least two renewals of existing grants at increased funding levels or increased grant terms
- Generate an additional \$110K in philanthropic funding to support the exploration and development of a business model for selling services
- Begin implementation of a *Selling Services* business model to generate at least \$20K in revenue
- Maintain 100% board giving and continue working closely with our Development Committee, especially in the area of *Topic Sponsorships*

Our projected revenue, classified by quarter and fundraising component, is detailed in Table 6 below.

Table 6. Projected revenue, by quarter, for fiscal year 2018–19.

	Q1	Q2	Q3	Q4	TOTAL
Revenue Total	\$1,344K [1]	\$505K	\$591K	\$370K	\$2,810K
<i>Institutional Donors</i>	\$1,319K	\$200K	\$466K	\$350K	\$2,335K
<i>Individual Donors</i>	–	\$105K	–	–	\$105K
<i>Topic</i>	–	\$200K	\$125K	–	\$325K

<i>Sponsorships and Fundraising Partnerships</i>					
<i>Earned Income</i>	\$25K [2]	-	-	\$20K [3]	\$45K

Notes:

- [1] The total revenue for Q1 includes \$500K in institutional grants we had expected to receive in Q4 of fiscal year 2017-18, but now expect to receive early in fiscal year 2018-19.
- [2] Tech contract with Wikimedia Foundation.
- [3] Selling Services.

Expenses

For 2018-19, we created a conservative budget that provides us with enough of a runway for creating revenue prior to starting some of the initiatives laid out in our new organizational strategy. We will only hire a software developer in January and we will hold off on starting our Wikidata pilot until mid 2019. Our main focus will be on testing our assumptions with *Selling Services*, *Topic Sponsorships*, and *Fundraising Partnerships* in the first two quarters of fiscal year 2018-19 and then make adjustments to our expenditures based on the results.

Table 7. 2018-19 Plan revenue and expenses

	2018-19 Plan
Revenue	\$2,810K
Expenses:	\$2,418K
General and Administrative	\$217K
Governance	\$94K
Fundraising	\$503K
Programs	\$1,243K

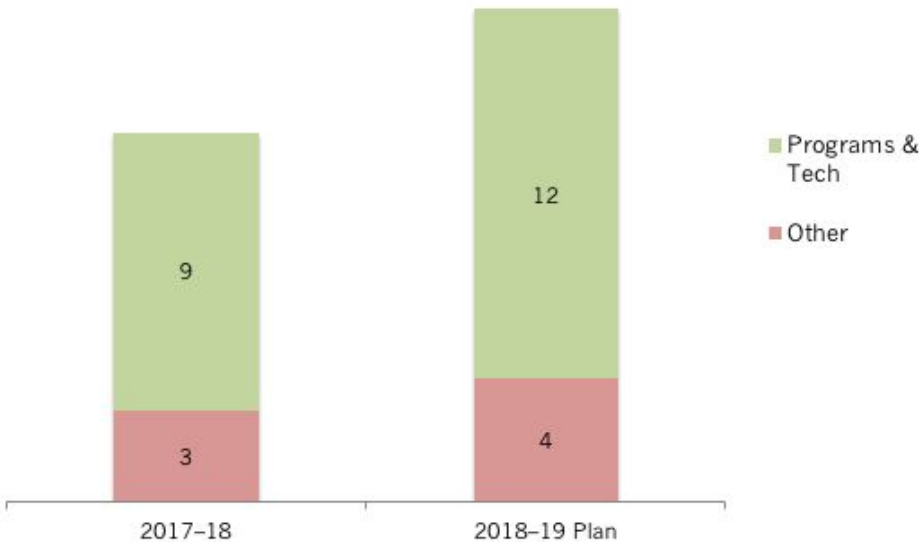
Technology	\$361K
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Staffing

For most of the fiscal year 2018-19, we will keep the number of staff on the same level as last fiscal year, except for a half-time Wikipedia Content Expert who will cover the growth of the *Wikipedia Fellows* program starting in October.

If we succeed with hitting our fundraising goals in Q1 and Q2, we will hire a Software Developer in January 2019. If our assumptions about *Selling Services* turn out to be correct, we will hire a Business Developer in April 2019. Provided sufficient funding and in order to prepare for the Wikidata pilot in fiscal year 2019-20, we will aim at hiring a Program Manager and a half-time Wikidata Content Expert in June 2019.

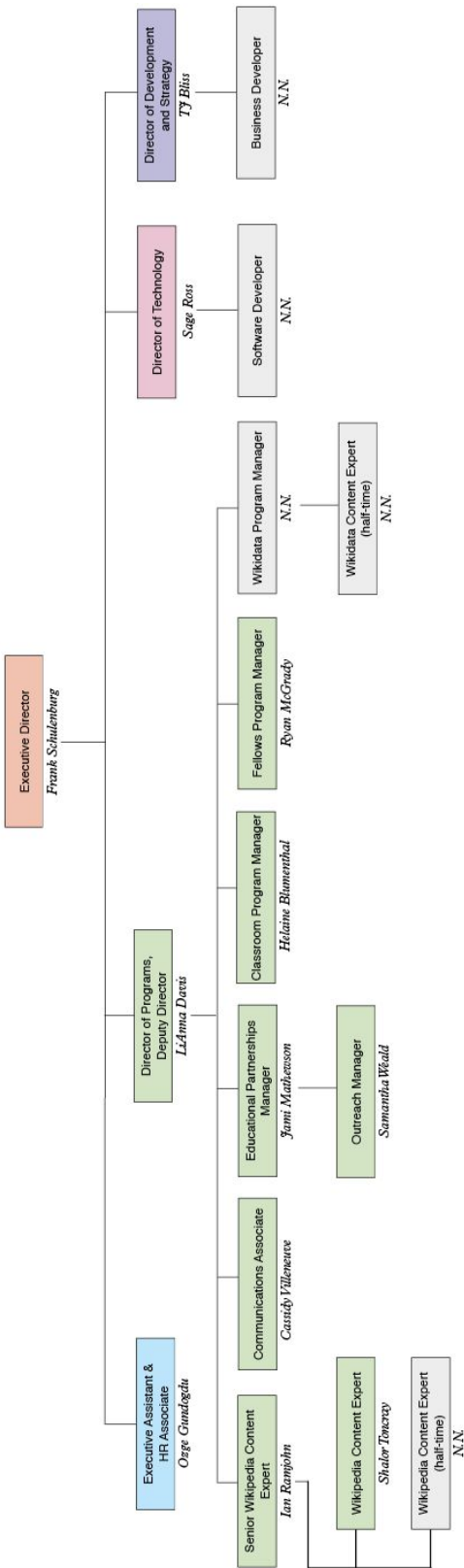
Figure 6. Staffing by functional area (headcount) [1]



Note:

[1] Increase in headcount dependent on funding.

Figure 7. Organizational chart for fiscal year 2018–19 (grey positions dependent on funding)



Board Resolution

RESOLVED, that the Board of Trustees hereby approves management’s proposed 2018–19 annual plan, which includes \$2,810K of revenues, \$2,418K of spending. If, during the year, management anticipates the spending at each quarter-end will differ materially from the plan, the Board directs management to consult the Treasurer and the Chair of the Audit Committee promptly. Reference: Management’s currently anticipated quarterly breakdown of this approved annual plan.

Table 8. Quarterly breakdown of the Annual Plan financials 2018–19

2018–19 Plan	Q1 (Jul.–Sep.)	Q2 (Oct.–Dec.)	Q3 (Jan.–Mar.)	Q4 (Apr.–Jun.)	Total
Operating Cash [1]	173,000 [2]	913,201	796,940	801,969 [4]	
Cash Revenues [3]	1,344,000	505,000	591,000	370,000	2,810,000
Cash Spending	603,799	621,261	585,971	607,053	2,418,084

Notes:

[1] As of the beginning of the quarter.

[2] Operating cash available at the beginning of the year (July 1) is based on projected expenditures and expected unspent funds carried forward from FY 2017–18.

[3] Anticipated/projected revenue.

[4] Anticipated cash of \$565K to be available at the start of fiscal year 2019–20.

* * *

Appendix

Risks considered in developing the 2018–19 plan

1. We don't hit our fundraising targets

Our biggest risk in fiscal year 2018–19 is failure to achieve our fundraising targets. We're mitigating this risk by structuring our annual plan to reduce expenses for new initiatives tied to specific new funding opportunities. By diversifying our funder portfolio and exploring new revenue streams, we're working toward the goal of greater financial sustainability for the future.

2. Staff turnover

Succession capacity for the unexpected departure or unavailability of staff is another risk. As our organization is operating in a very complex world at the intersection of Wikipedia and academia, we rely heavily on employees with the right mix of special skills. Identifying, onboarding, and training job candidates that are both a cultural fit and bring these specific skills is a huge upfront investment for our organization. Therefore, staff turnover can set us back, especially in areas where we currently don't have enough backup capacity. We'll mitigate this set of risks by developing explicit succession plans for critical functions early in this fiscal year.