Advancement

October 2017 quarterly check-in

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Advancement - Fundraising Operations

Annual Goal: Support for FR, Donors, Store & Community

Quarterly Goals:	Dependencies:	Status:
LAST QUARTER		
1. Donor Services - Q1 Campaigns (BR, ZA, ML, IL) 2. Payments- Gather information for PSP restructure 3. Central Notice - Focus on new banner documentation and landing page design	1. Fr-tech, Fr-online 2. Fr-tech/Major Gifts 3. None	1. Worked with dLocal to improve reporting and console features. No significant fraud levels from these countries 2. Campaigns and Payments Refocus 3. New community banner template and documentation. Template developed for Wiki Loves Monuments UK campaign (Results: Traffic and Submissions improved by ~130% relative to 2016, highest ever for UK)
NEXT QUARTER		
1. Donor Services - Q2 Campaigns (FR, BE, US, CA, UK, AU, NZ) 2. Payments- Discovery on Micropayments 3. France Support & Big English community participating methods	1. Fr-tech, Fr-online 2. Fr-tech/Engineering 3. None	1. In progress 2. In progress 3. In progress
STATUS TOWARD ANNUAL GOAL: On Schedule		

Fundraising Operations
switching into high gear

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Payments
(1 FT)

✓ Test run all Payment Flows

✓ Monitoring PSPs (traffic, changes, fixes)

✓ Reporting & Watching KPIS

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Donor Support
(3 FTs & 4 PTs)

Mission
- Educate about the movement (*'are you a nonprofit'?, 'can you change my page'?)*
- Respond to topical questions (NSA suit, Wikileaks, Daily Mail as source)

Donors
- Donation management (refunds, cancellations, email address updates)
- Monitor donor experience, incl. troubleshooting bugs and problems

Fundraising
- Fraud:
    - Thresholds for optimal fraud filter scores (e.g. in Dec 2016 enabled ~90% of false positives to be settled, with no increase in fraud % - compared to December 2015)
    - Scans for and proactive refunds of fraudulent donations
- Link between donors and fr-tech (triage and testing of regular issues & new bugs)
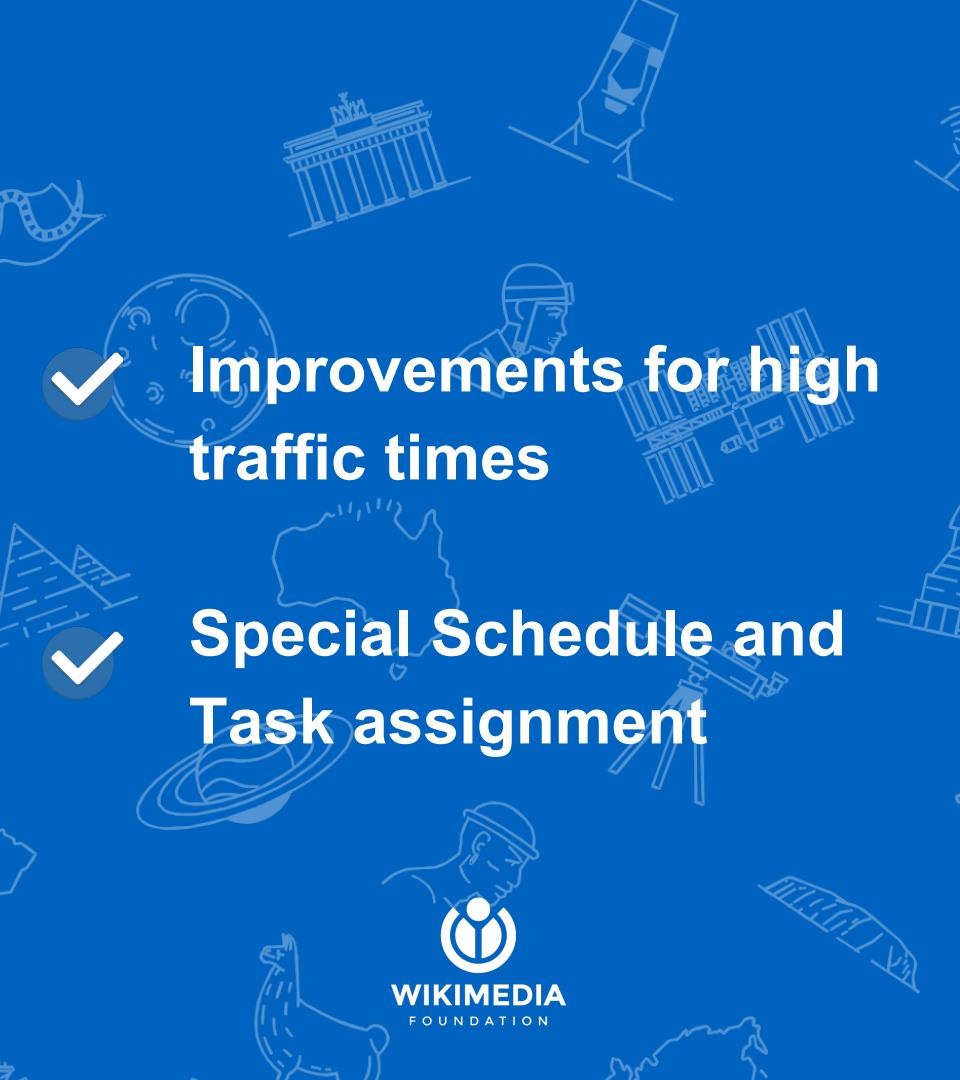
Improvements for high traffic times

Special Schedule and Task assignment

- Testing improvements for high traffic times
  - Zendesk bulk responses to bulk email complaints
  - New queues to improve efficiency
- Special schedule and task assignment
  - Tagging for high priority tickets
  - Assigning cancellations/settlements at PSP consoles to specific agents
  - Huge increase on voicemails
  - Rescuing emails suspended in the Zendesk & Gmail spam folders

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Community Engagement
(1 FT)

Feedback

Live Sessions - feedback as a conversation

Snapsurveys - inspiration for copy ideas, single question style (wikimedia-l, wikipediaweekly and internally with staff)

Affiliates - engaging with Affiliates ensuring they play a key role in our processes

Social Media Collaboration - with affiliates and community social media on shared messaging and responses

Updates

State of the campaign, posting on Wikimedia-l and on wiki to broaden awareness and increase community understanding of campaigns and processes.

Monitoring

Social Media, Wider Web & News
Twitter, Facebook, Reddit, Quora. Keywords relating to Wikipedia, WMF, affiliates or wider Wikimedia movement

Phabricator & IRC Channels
(#wikipedia-en, #wikipedia, #wikimedia, #wikimedia-fundraising)

Mailing lists (wikimedia-l, wikipedia-l etc.)

Wiki's: Meta - WMF Fundraising Pages Village Pumps and other community portals

Wikipedia Store
(1 PT)
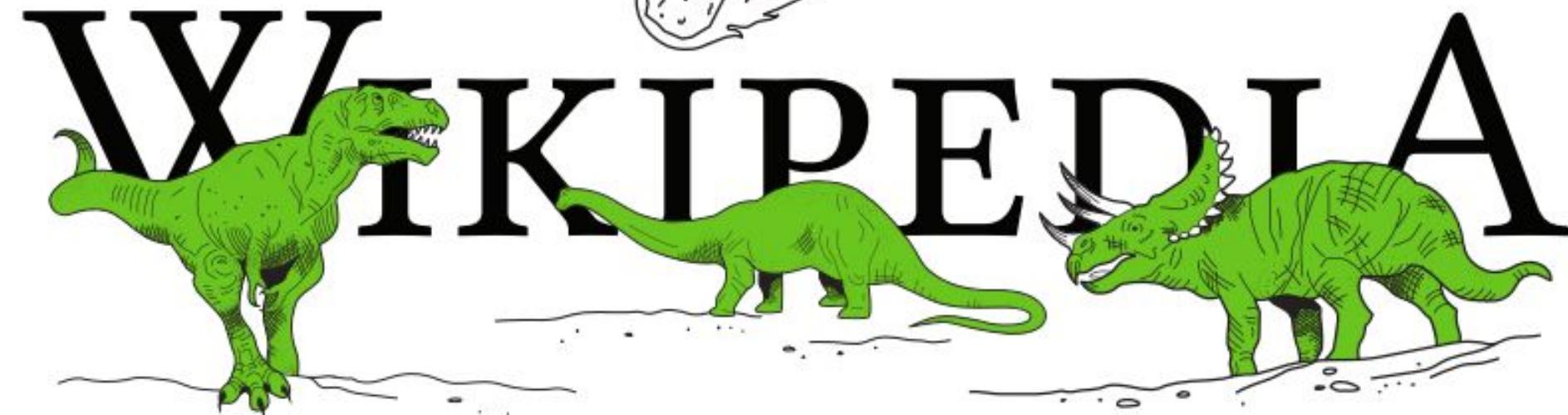
New mug

Scarves are back!

color

black

Special Edition
White Lapel Pin

October 2017 **Fundraising Tech**

n/a [LINK]

Annual Goal: Raise $57 million

Quarterly Goals:	Dependencies:	Status:
LAST QUARTER		
1. Time box work on Civi duplicate records 2. Continue Ingenico reintegration	1. Major Gifts 2. Ingenico	1. Partially Done: impacted by email and Big English support 2. Time boxed to July and August. Will resume in January
NEXT QUARTER		
1. Support Big English Campaign 2. Time box work on Civi duplicate records 3. Tentative: Continue Ingenico reintegration	1. All Advancement 2. Major Gifts 3. Ingenico	1. Continuing from Q1 2. Continuing from Q1 3. Continuing from Q1

STATUS : On schedule

October 2017 **Fundraising Tech**   n/a [LINK]

What you learned working on this objective or workflow:

Did anything unexpected (good or bad) happen?

- **Civi stats and backup lag interfered with campaigns and test (bad)**
  - **The rest of the system is so stable that the _record high donation volume_ is a challenge in new places (good)**

What would you do differently if you had to do it again?

- **We should check donation volumes with historical data as we troubleshoot bugs in campaign tests. This is planned for future tests.**
- **We need better instrumentation to detect lags in donations. This is already started (T176920)**

Did you struggle with anything?

- **We were sidelined by bugs which delayed civi dedupe. It was the right choice. We just need to be realistic about how much progress we can make and still respond to change.**

Advancement - Online Fundraising

Annual Goal: Raise $60 million

| Quarterly Goals:	Dependencies:	Status:
LAST QUARTER		
$9.5 million raised through online campaigns and early testing for the English campaign Published 2016-17 fundraising report	Fr-tech, Communications, Reading, Legal	Exceeded Q1 goal https://wikimediafoundation.org/wiki/2016-2017_Fundraising_Report https://blog.wikimedia.org/2017/10/03/fundraising-banner-limit/
NEXT QUARTER		
Raise $43M through online campaigns	Fr-tech, Communications, Reading, Legal	In progress

STATUS TOWARD ANNUAL GOAL: Raised 16% of annual goal

# English Campaign Banners and Email: Totals by Source

FY15/16

- Email 37.87%
- Desktop banners 49.42%
- Mobile device banners 12.71%

FY16/17

- Email 42.98%
- Desktop banners 43.67%
- Mobile device banners 13.35%
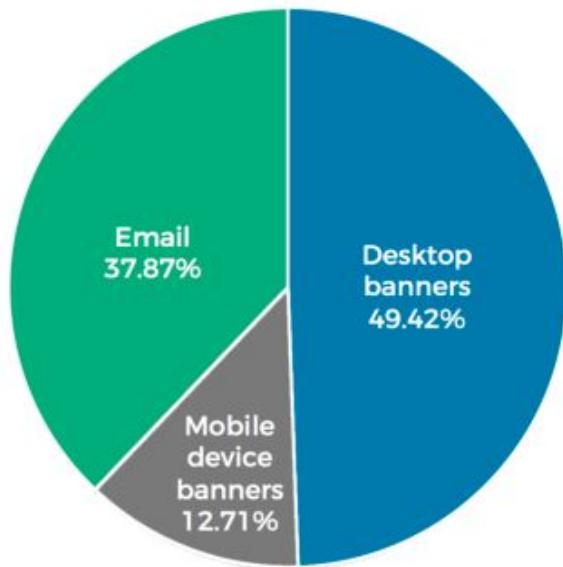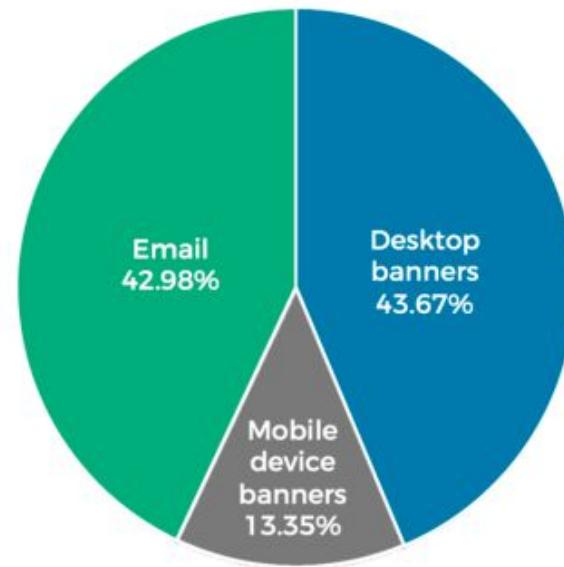
Big English '16: % of total donations per banner impression

11-15+ imp.
3.5%

6-10th imp.
5.5%

5th imp.
3.0%

4th imp.
4.5%

3rd imp.
9.0%

1st impression
55.5%

2nd imp.
19.0%

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Email Fundraising

FY15/16	$16.9M
FY16/17	$23.5M

40% increase

$5M $10M $15M $20M
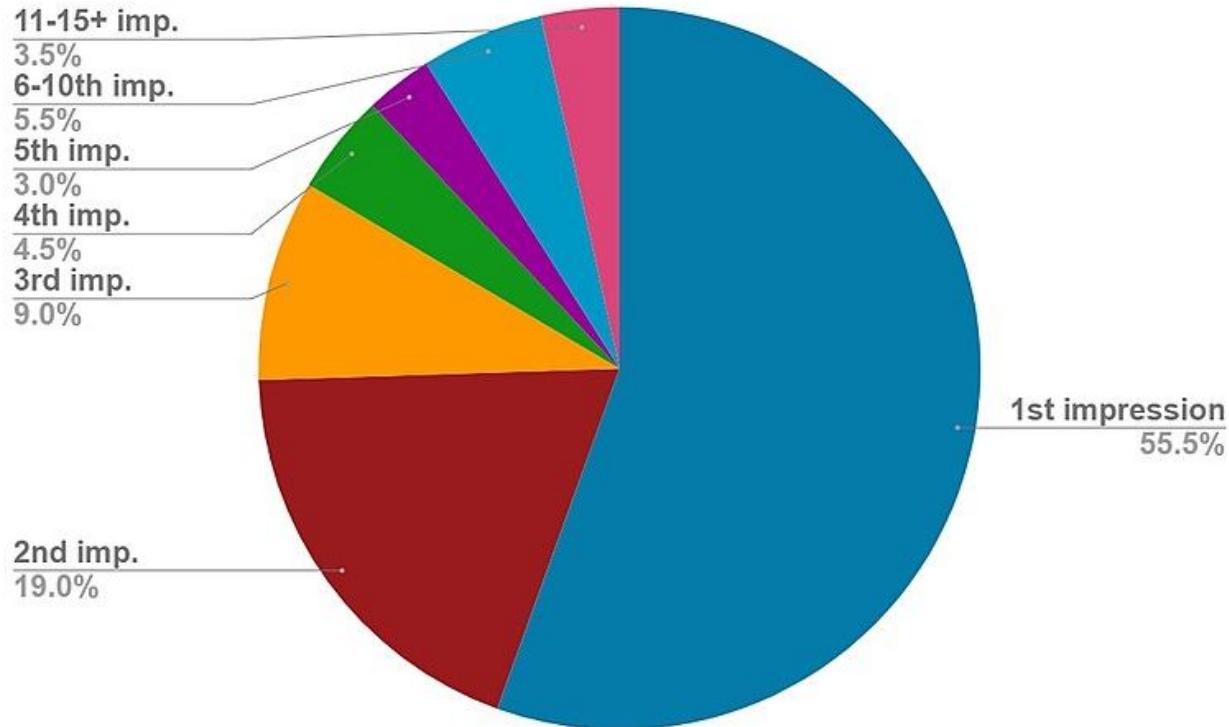
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The average nonprofit sends 54 emails a year per subscriber
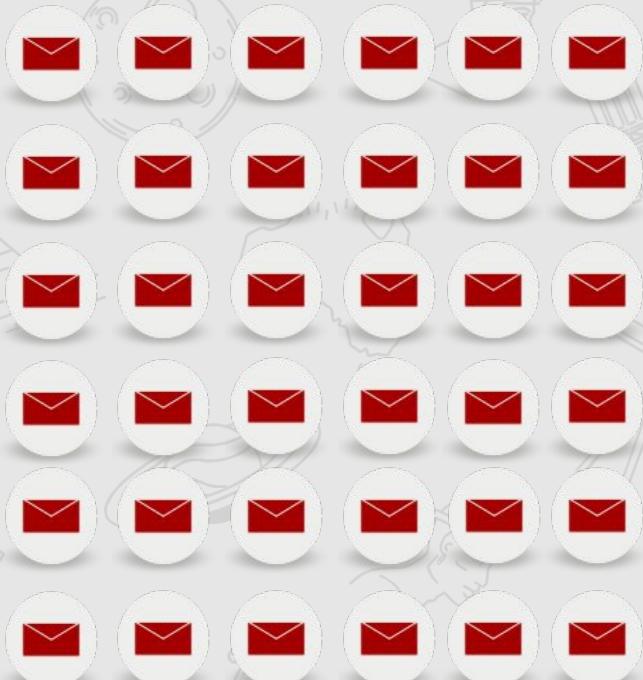
Wikimedia sends 1-10

Email Fundraising

Compared to nonprofit industry averages, Wikimedia fundraising email receives extraordinary engagement:

Open Rate — **2.6x higher**

Click Rate — **22.7x higher**

Donation Rate — **108x higher**

source: M+R Nonprofit Benchmarks Study

Past Donor Email Metrics
19,289,697 emails sent
$23,568,140.51 raised (USD)
1,454,315 donations
$16.21 avg donation
761 variables tested

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CHECK IN

July 2017

TEAM/DEPT

Major Gifts & Foundations

PROGRAM

n/a [LINK]

Annual Goal: Raise $8 million

Quarterly Goals:	Dependencies:	Status:
LAST QUARTER		
1. Develop plan to solicit gifts in support of 2030 strategy 2. DC Donor Event 3. Fully operationalize tiered donor engagement calendar & contact plan	1. Comms, Executive Office 2. Comms, FR-Tech 3. none	1. In progress 2. Complete 3. Complete
NEXT QUARTER		
1. Los Angeles Donor Event 2. Raise $3m via Annual Appeal/Big English 3. Solicit 3 $250k+ gifts	1. none 2. FR-tech, Fr-Online, Comms, Admin 3. Audiences, Executive Office	1. In progress 2. In progress 3. In progress

STATUS : $1.88m raised to date. On schedule to annual goal.

Endowment 2017

- **$17.6M raised**
- **Announced $10M matching gift**
- **Welcomed new Endowment Director**
- **Finalized design for Endowment brochure**
- **Received one planned gift**

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Annual Goal: Raise $5 million; Secure 5 planned gifts

Quarterly Goals:	Who are you working wth:	Status:
LAST QUARTER		
Announced $10M in gifts (incl. WMF matching) Finalized brochure design (website design, continues)	Communications, Legal	Completed
NEXT QUARTER		
Raise $1.5 million; Secure 2 planned gifts Fill remaining two Advisory Board seats Launch Endowment website	Wikimedia Endowment Board Wikimedia Endowment Board Communications, Mule Design	In progress
STATUS TOWARD ANNUAL GOAL: $250K raised;		

Matching gift grows Wikimedia Endowment by $10 million

Wikimedia Endowment Advisory Board member Peter Baldwin and his wife Lisbet Rausing, co-founders of the Arcadia Fund, donate $5 million, the largest gift to-date to the Wikimedia Endowment.

October 2017 **Partnerships & Global Reach**

9.2 and 9.3

Annual Goal: Increase reach and awareness of Wikimedia projects in emerging countries

Quarterly Goals:	Dependencies:	Status:
LAST QUARTER		
1. Present the results of both pre and post Asiacell launch phone surveys in Iraq, along with the analytics results. 2. Launch of Wikipedia Zero partnership in Nigeria with Smile Nigeria. (Carried from Q4 FY16-17) 3. Planning future direction of partnerships in Global Reach affordability-focused partnerships and program. 4. **[Cross-functional]** - Movement Strategy 5. **[Cross-functional]** - New Readers.	Legal, Comms, Audience, Core MS team, external partners.	1. Done. 2. Done. 3. Done. 4. Done. 5. In progress.
STATUS : TOWARD ANNUAL GOAL: OBJECTIVE IN PROGRESS FOR FY1718		

October 2017 **Partnerships & Global Reach**

9.1 and 9.3

Annual Goal: Increase reach and awareness of Wikimedia projects in emerging countries

Quarterly Goals:	Dependencies:	Status:
NEXT QUARTER		
1. Create a clear plan to develop the most impactful partnerships to increase reach and awareness in Mexico and Nigeria. 2. **[Cross-functional]** - New Readers.	Legal, Comms, Audience, external partners.	1. In progress 2. In progress. Continuing from Q1