



**WIKIMEDIA**  
FOUNDATION

# Wikimedia Foundation

## 2014 -15 Annual Plan

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*About this document:*

- *Amounts reflect management reporting, not generally accepted accounting principles (GAAP). GAAP amounts are noted where they appear.*
- *Management reporting reflects primarily cash-basis revenues and spending. As such it excludes non-cash items such as in-kind amounts and depreciation and includes total spending for capital items. Revenue projections and plan do not include ancillary revenue such as interest income, speaker fees, and misc. income.*

*Restricted amounts do not appear in this plan. As per the Gift Policy, restricted gifts above \$100K are approved on a case-by-case basis by the WMF Board.*

## Background and context

The Wikimedia Foundation is a global non-profit that provides free, uncensored knowledge for people all over the world in hundreds of languages, operating in the context of an international network of volunteer writers and editors. Technology is the primary means by which we achieve our mission: our product is a set of websites. That's why we have been making significant investments in product and engineering staff, it's why we conducted the Narrowing Focus exercise, and it's why we set out to recruit an Executive Director from a product and engineering background. We also fundraise on behalf of the global movement and give out funding to Wikimedia individuals and organizations through a set of highly transparent and participatory processes. But our core work and main responsibility is creating and supporting the sites. The 2014-15 plan builds on this understanding.

A note on strategy. The current five-year strategic plan carries the WMF until July 2015. We are glad the organization developed a five-year strategy, and we believe it accomplished its main goal of creating sufficient consensus about direction to enable the organization to know where to put its focus. But five-year planning tends to lock an organization into positions that are hard to iterate and evolve over time. (They are more "waterfall" than "agile.") We believe a five-year plan made sense for the WMF back when it was created, but it is less well-suited to us today. We want to be fast and flexible and iterative.

Therefore, the WMF does not intend to create another five-year plan, nor do we intend to launch another strategy development process similar in scope and scale and resources to the one that resulted in our current plan. Instead, the Executive Director will work with the Board to build on and evolve existing systems and structures and processes, with the goal of designing into them a continual evolution of strategic direction. Additionally, in 2014-15, the Executive Director will work with the Board to develop a plan for how to handle "Movement Roles": the continued evolution of roles-and-responsibilities in the Wikimedia movement organizations.

## Overview

In 2014-15 we will invest further in Product & Engineering, particularly by adding staffing resources. Of the \$9.3 million requested increase in spending from our projected expenditures of \$49.2 million, 40% is for Product and Engineering and 49% of the increase is for staffing. We intend to hire more software engineers and operations engineers, as well as more scrum masters and QA testers. Last year we created User Experience and Analytics departments; this year we will hire more staff for those departments. We will create a new Community Engagement Department, designed to support the product managers in liaising with Wikimedia editors as they're developing new features and services. Having more staff in these areas will enable us to design, develop, and roll out new functionality with higher quality, less friction, and more community input, with the overall goal of making contributing to and reading Wikipedia and our other projects easier and more fun.

This expansion of product and engineering will require more administrative support from the rest of the organization, which this plan provides for.

We will also continue to cautiously expand our grantmaking work. We're proud of our grantmaking; we've built our programs pretty much from scratch in just a few years, and we're pleased they're highly participatory, transparent, and responsible. That said, the early evidence suggests that the Wikimedia movement's programmatic activities aren't achieving the level of impact we'd hope to see with the money that's being spent. We expect that we can improve outcomes by iterating on existing practices and supporting areas that are still weak (e.g. data-informed decision-making). Therefore, in 2014-15 we'll be keeping the total allocation of grant money steady, and making some modest investments in staffing supporting grantmaking, primarily with the goal of increasing the likelihood that the funding will achieve programmatic impact.

Our focus areas for activity in 2014-15 will be:

1. **Infrastructure:** keeping Wikimedia's sites and services operating at a high level and supporting Wikimedia's developer community;
2. **Mobile:** growing contributions and readership on mobile devices;
3. **Editor Engagement:** growing and diversifying contributors to Wikimedia projects;
4. **Nontechnical Movement Support:** supporting the movement through non-technical means such as grants, programmatic evaluation, and legal defense.

These initiatives are designed to help the WMF achieve its strategic goals: to expand the numbers of readers and contributors; to make it easier to contribute from any device, especially mobile; to ensure our sites are robust enough to meet the additional traffic we expect; and to continue supporting innovation at both the WMF and in the greater Wikimedia movement. We're expanding projects that are already working well. We want them to work better still. We believe they will, and that the WMF -- and the movement -- will be stronger because of what we'll do in the year ahead.

## Revenue and Expenses

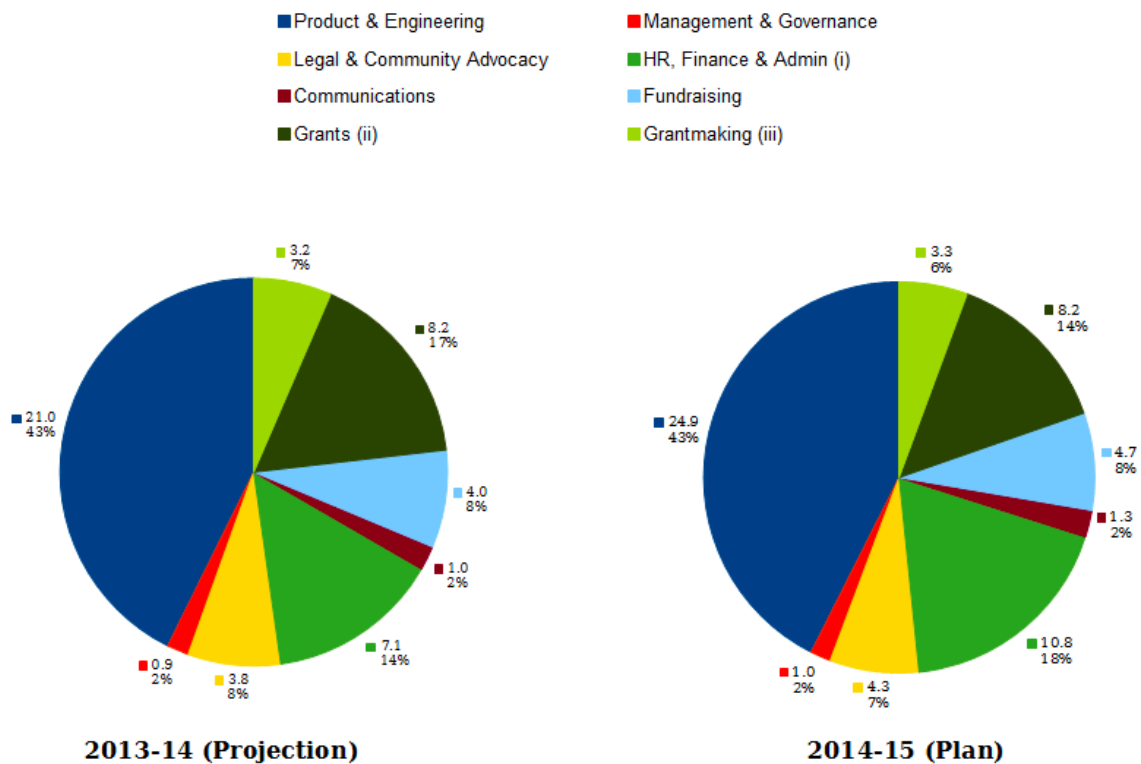
In 2014-15 our plan is to increase revenue to \$58.5 million from a 2013-14 projection of \$52.5 million, an increase of 11%. Our revenue targets are designed to fund investments in the WMF, primarily in product development and engineering. We believe that if we chose to, we could increase revenues more than is reflected in this plan, but we believe this target reflects an appropriate balance between funding growth while minimizing annoyance to the readers of the projects.

This plan adds no money to the reserve, because we don't think it's necessary: the WMF's track record of over-achieving its revenue targets and underspending against plan means that the reserve continues to grow more quickly than spending. (In 2013-14 we project to add \$3.3 million to the reserve, despite a plan target of zero.) To achieve the revenue target, we will continue to innovate to increase the effectiveness of banner messaging, translations and localizations, and will increase revenues from mobile devices.

	2013-14 Projection	2014-15 Plan	Increase (Decrease)	%	
<b>Revenue</b>	52.5 (i)	58.5	6.0	11	(i) Amount includes donation revenues retained by payment processing chapters as per the FDC grant of approximately \$2.1M.
Expenses: WMF	41.0	50.3	9.3	23 (ii)	(ii) Baseline spending at the beginning of 2014-15 is projected to be \$45.5M annually. This increase therefore represents \$4.8M or 11% of growth in spending in-year, which includes one-time expenditures of \$1.3M to build out office space to accommodate staffing growth.
Expenses: Grants	8.2 (i)	8.2(iii)	0	0	(i) Amount includes donation revenues retained by payment processing chapters as per the FDC grant of approximately \$2.1M. (iii) Amount includes an estimated \$2.1M to be retained by the payment processing chapters.
<b>Total Expenses</b>	49.2	58.5	9.3	19	
<b>Contri- bution to reserve</b>	3.3	0.0 (iv)	(3.3)	(100)	(iv) For FY 2014-15, WMF is not planning on adding funding to the reserve.
<b>Reserve at end of year</b>	42.2	42.2	0	0	
<b>Staffing at end of year</b>	191	240	49	26 (v)	(v) Staffing growth trend for previous years: 32% (projected) in 2013-14, 22% in 2012-13, 53% in 2011-12, and 56% in 2010-11.

Figure 1

## Total Spending by Functional Area



**Figure 2**

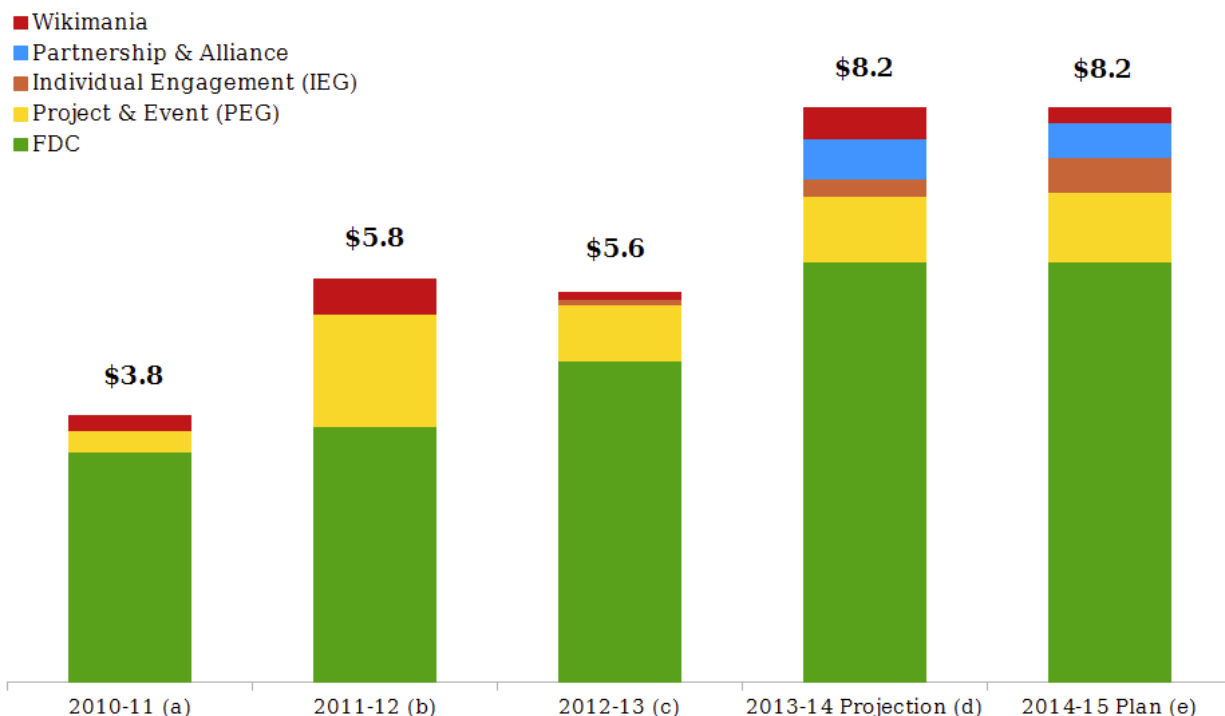
All amounts USD, in millions. All amounts a percentage of the whole.

(i) Increase of \$1.7 million for office space expansion to accommodate staffing growth, primarily in Product & Engineering. (This includes both the increased rent costs and one-time costs for furniture and space build out.) Also, an allocation of about \$1.0 million to cover insurance, professional services and Wikimania.

(ii) "Grants" represents all funds to be distributed by the WMF including FDC, Project & Event grants, Partnership & Alliance grants, and Individual Engagement grants, and as well as funds to support the annual Wikimania Conference, including scholarship funding.

(iii) "Grantmaking" represents all WMF staff and resources that support the grant programs, as well as learning and evaluation functions and the Global Education Program.

## Grants Spending



**Figure 3**

All amounts USD, in millions.

(a) For 2010-11, "Grants totalling \$3.8M" is comprised of \$3.3M in funding retained by the payment processing chapters (for comparative purpose, they are presented as the FDC grants), \$275K in Project and Event grants, and \$211K in Wikimania funding.

(b) For 2011-12, "Grants totalling \$5.8M" is comprised of \$3.66M in funding retained by the payment processing chapters (for comparative purpose, they are presented as the FDC grants), \$1.6M in Project and Event grants, and \$499K in Wikimania funding.

(c) For 2012-13, "Grants totalling \$5.6M" is comprised of \$4.6M in FDC grants (including \$2.8M retained by the payment processing chapters), \$803K in Project and Event grants, \$68K in Individual Engagement grants, and \$110K in Wikimania funding.

(d) For 2013-14 (Projection), "Grants totalling \$8.2M" is comprised of \$6M in FDC grants, \$950K in Project and Event grants, \$562K in Partnership & Alliance grants, \$250K in Individual Engagement grants, and \$450K in Wikimania funding.

(e) For 2014-15 (Plan), "Grants totalling \$8.2M" is comprised of \$6M in FDC grants, \$1.0M in Project and Event grants, \$500K in Partnership & Alliance grants, \$500K in Individual Engagement grants, and \$200K in Wikimania scholarship funding. This is an increase in funding for Wikimania Scholarships of 33%, of Project and Event grants, of which about 20% goes to individuals, of 43% and Individual Engagement grants of 125%.

## 2013-14 Spending (Projected) Compared with 2013-14 and 2014-15 Plans

	FY 13-14	FY 14-15	Change in		% of Total FY 14-15 Plan	
	Projection	Plan	\$	%		
<b>Product</b>						
Office of the VP of Product	223	464	241	108%	a	1%
Product Development	1,263	1,342	79	6%		2%
User Experience	952	1,389	437	46%	b	2%
Analytics	1,204	1,970	766	64%	b	3%
Wikipedia Zero	893	1,073	180	20%		2%
Community Engagement	-	625	625		c	1%
<b>Engineering</b>						
Office of the VP of Engineering	307	624	317	103%	d	1%
Features	2,726	3,289	563	21%	b	6%
Platform	2,734	3,242	508	19%	b	6%
Mobile	1,485	2,045	560	38%	b	4%
Operations	8,650	7,680	(970)	-11%	e	13%
Language	562	742	180	32%	b	1%
Team Practices Group	-	365	365		f	1%
Management & Governance	931	1,053	122	13%		2%
Legal & Community Advocacy	3,796	4,255	459	12%	g	7%
HR, Finance & Admin	7,102	10,812	3,710	52%	h	18%
Communications	978	1,363	385	39%	i	2%
Fundraising	3,963	4,676	713	18%	j	8%
<b>Grants</b>	<b>8,212</b>	<b>8,200</b>	<b>(12)</b>	<b>0%</b>		<b>14%</b>
Grantmaking & Program Development	3,246	3,337	91	3%		6%
<b>TOTAL</b>	<b>\$49,227</b>	<b>\$58,546</b>	<b>\$9,319</b>	<b>19%</b>		<b>100%</b>

Figure 4  
All amounts USD, in thousands.

### 2014-15 Plan vs. 2013-14 Projection

**Summary: Projecting increases in spending are consistent with focus on Product and Engineering.**

- (a) Increase due to planned re-allocation of existing staff to support strategic research/analysis.
- (b) Increases in engineering/product development: software engineers, operations engineers, user experience design/research, data analysts, data engineer, QA testers.
- (c) New sub-department in Product, designed to support product managers with community engagement work.
- (d) Increase due to annualization of salary for VP of Engineering position and associated increases in operating expenses due to growth in Engineering.
- (e) Decrease due to reduced cost of bandwidth and capital expenditure cost as data center transitions are completed.
- (f) New sub-department in Engineering, designed to support the department with practices development.
- (g) Increase due to costs allocated to professional services.
- (h) Increase of \$1.7 million for office space expansion to accommodate staffing growth, primarily in Product & Engineering. (This includes both the increased rent costs and one-time costs for furniture and space build out.) Also, an allocation of about \$1.0 million to cover insurance, professional services, and Wikimania.
- (i) Increase due to adding staffing and costs allocated to professional services.
- (j) Increase due to adding staffing as well as some cost increases due to higher payment processing costs due to a larger volume of money being processed.



## Staffing

In 2014-15 the WMF plans to hire 49 additional staff members, the majority (35 FTEs or 71%) in Product and Engineering. Currently 64% of WMF staff work in Product and Engineering, and by the end of 2014-15 that is planned to increase to 66%. The purpose will be to add resources (e.g. software engineers, QA testers, data analysts) in areas that have been identified as blockers during the WMF quarterly reviews by the teams charged with responsibility for executing priority initiatives such as Mobile, Growth, Visual Editor, and Flow.

It is difficult to hire product and engineering staff because the Bay Area market for technical talent has been very hot since 2010, with all Bay Area engineering firms constrained in their ability to hire. (See *section on operational risks*.) Therefore in 2014-15 the WMF will:

1. Lift any internal administrative restrictions that may constrain technical hiring. Product and Engineering will have 35 open reqs to fill when and how they see fit.
2. Continue hiring product and engineering staff who do not live in the Bay Area. Currently about 27% of product and engineering staff work from outside the Bay Area: that is working well for the organization, and we expect the proportion of remote staff may increase over time.
3. Launch a funded multi-departmental initiative to improve systems and processes for supporting the WMF's remote staff, who currently make up 20% of the organization. This will especially help product and engineering, because 94% of the WMF's remote staff work in those areas.
4. Increase HR and other administrative support dedicated solely to P&E, in part to support talent acquisition.

The WMF will expand to add an additional floor of office space, to make room for the new people.

We also propose to add a total of 14 other positions, as detailed in the chart on page 10. Of these, one in F&A and one in HR will be dedicated solely to supporting P&E. Eight of these 14 positions will be stage-gated until October 2014. The purpose of the stage-gate is to build in a decision point at which the organization can assess what's happened year-to-date, and decide whether/how the eight stage-gated positions should be filled. In the past, we've stage-gated hires for financial and capacity-to-hire reasons. In 2014-15, because there is a new Executive Director who's currently learning the organization, the WMF is stage-gating eight positions: three in Grantmaking, two in Communications, two in Finance & Administration, and one in Human Resources. The owner of the stage-gate is the Executive Director.

## Staffing by Functional Area - Table

	2013-14 Projection <i>includes vacancies</i>	Current vacancies <i>included in projection *</i>	2014-15 Plan	Non Stage Gated	Stage Gated	Total Increase (FTEs)	Total Increase (%)
Executive	1	0	1	0	0	0	0
Product & Strategy	37	5	49	12	0	12 (i)	27
Engineering	85	8	108	23	0	23 (ii)	26
Grantmaking	16	2	20	1	3	4 (iii)	25
Fundraising	10	1	12	2	0	2 (iv)	20
Legal & CA	12	0	12	0	0	0	0
Finance & Admin	18	1	23	3	2	5 (v)	28
Human Resources	8	3	9	0	1	1 (vi)	13
Communications	4	1	6	0	2	2 (vii)	50
<b>Total</b>	<b>191</b>	<b>21</b>	<b>240</b>	<b>41</b>	<b>8</b>	<b>49</b>	<b>26</b>

**Figure 5**

(i) 5 Community Engagement; 3 UX; 3 Analytics; 1 Product Manager. Req numbers 198, 199, 200, 229, 235, 212, 225, 228, 205, 206, 226, 215.

(ii) 15 software engineers; 3 Ops engineers; 2 QA testers; 2 scrum masters; 1 event coordinator. Req numbers 203, 204, 218, 219, 223, 224, 231, 233, 236, 237, 239, 241, 242, 197, 142, 238, 209, 208, 234, 240, 210, 230, 227.

(iii) 2 Program Officers; 1 Evaluation Officer; 1 Global Education Officer. Req numbers 214, 232, 217, 201.

(iv) 1 International Campaign Manager; 1 Product Manager. Req numbers 202, 38.

(v) 2 Office IT positions; 1 project assistant; 1 admin assistant; 1 payroll clerk. One of these is dedicated to supporting solely P&E needs. Req numbers 220, 222, 111, 216, 207.

(vi) 1 position dedicated to supporting solely P&E and/or remote staff. Req number 221.

(vii) 1 media relations; 1 Wikipedia Zero. Req numbers 211, 213.

\* As of mid-May there are 21 vacancies total at the WMF: req numbers 32, 59, 91, 143, 187, 138, 174, 36, 85, 189, 190, 119, 188, 74, 92, 175, 102, 192, 191, 181 and 43. It's expected these will be filled before 1 July 2014, or shortly afterwards.

## Staffing Growth Over Time - Chart

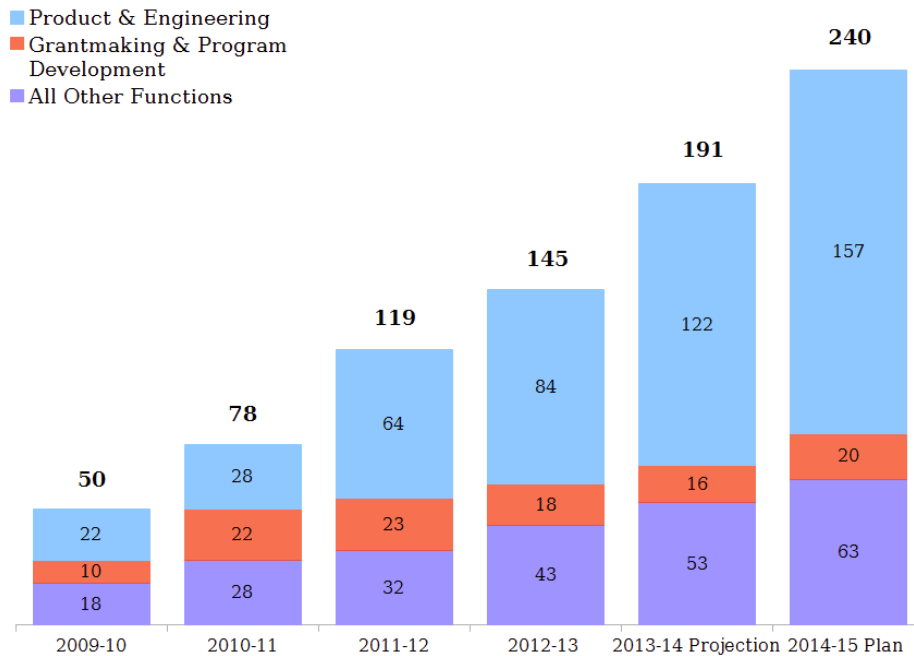


Figure 6

### Key activities

In 2014-15, the WMF will do its normal work of supporting the continued operations of the Wikimedia projects. (Please see document *Appendix - Ongoing work areas of the Wikimedia Foundation.*)

Beyond that ongoing work, the four major priority areas for 2014-15 are:

- Infrastructure;
- Mobile;
- Editor Engagement;
- Nontechnical Movement Support.

These priority areas are described below.

*Please note: The WMF aims to preserve the ability to be responsive to a fast-changing product environment and to a large and diverse community, and therefore the plans below may change. In order to create internal and external accountability in that context, the WMF maintains a process of quarterly reviews of strategic high-priority initiatives. These reviews are used to assess progress, resolve blockers, and agree on changes to the plan. Minutes are publicly captured.<sup>1</sup>*

### Infrastructure

The purpose of this activity area is to keep Wikimedia's sites and services operating reliably and efficiently, to improve MediaWiki as a platform, and to support Wikimedia's developer community. The work described here is chiefly technical, and is carried out mainly by the Technical Operations, Platform Engineering, Internationalization, and Analytics teams.

We will enter the new fiscal year at the tail-end of the buildout of a new secondary data center location in Dallas, Texas, replacing our aging data center in Tampa, Florida which was no longer able to function as

<sup>1</sup> [https://meta.wikimedia.org/wiki/Metrics\\_and\\_activities\\_meetings/Quarterly\\_reviews](https://meta.wikimedia.org/wiki/Metrics_and_activities_meetings/Quarterly_reviews)

a full failover in case of disaster or emergency. As this work concludes, the technical operations team will be able to focus more time on infrastructure improvements such as the increased use of encryption for site traffic, improved backups/monitoring, strengthened relationship with infrastructure-dependent teams, investigation of additional caching locations, etc.

Operations, Platform Engineering, and Analytics collaborate on key infrastructure such as data collection/processing, developer tooling, test infrastructure, and site performance monitoring and improvement. The latter includes the possible move to HHVM to execute Wikimedia's PHP code with significantly increased performance, primarily impacting performance for active contributors to our projects.

The totality of infrastructure-related work comprises the activities below.

### **Key activities**

- Site operations: We operate the fifth most popular web property on the planet. We manage about 900 servers to support the Wikimedia sites, and continually optimize our operations in multiple data-centers world-wide.
- Site performance and architecture: We make Wikimedia sites faster (by improving performance of the existing code and the execution environment) and we keep them maintainable.
- Wikimedia Labs: We provide the community a space for experimentation and tool hosting.
- Data dumps: We make sure others can fully reuse the community's freely licensed work.
- Code review: We enable code contributions from community and staff while protecting the quality and security of MediaWiki as it supports our projects.
- Security and privacy: We work to protect Wikimedia sites against criminal attacks, and to protect and enhance the privacy of our users.
- Deployment: We push new code into production to make changes to the Wikimedia sites.
- APIs: We enable external developers to create applications that interface with Wikimedia sites.
- Release management: We support third party users of our software.
- Test infrastructure: We provide a platform for thorough routine checks of code changes.
- Shell requests: We handle site configuration changes to support community requests.
- Search, authentication, etc.: We maintain and develop essential infrastructure parts for the entirety of our sites.
- Quality Assurance: We carry out thorough routine checks of code changes to help ensure better rollouts for our community.
- Reporting and documentation: We make MediaWiki accessible to new developers, and inform Wikimedia's volunteer community about software changes that affect their work.
- Outreach and development: We grow and nurture the MediaWiki developer community, e.g. by participating in mentorship programs and supporting hackathons around the world.
- Upstream collaboration: We contribute back to free software projects whose work we are building on.
- Analytics: We operate infrastructure to collect data about use of our projects in a manner consistent with our privacy policy, to better inform movement-wide decision-making.
- Research: We perform complex analyses, A/B tests, qualitative studies, and other work in support of rational decision-making.
- Internationalization: We interface with the global community of volunteers localizing our software, and provide tooling that addresses language issues for users around the world.

### **Mobile**

The purpose of this activity area is to grow contributions and readership on mobile devices.

In 2014-15, the WMF will begin to move from viewing mobile as one of its "key programs," to reinventing itself as an engineering/product organization designed for a multi-device world. This process is an internal one and will at first be largely invisible to the community and the outside world as we equip more of our engineering teams with the knowledge and resources required to develop responsive, multi-device functionality, and as we assign experienced mobile web engineers to internal teams.

As more and more users join our sites on mobile, or even migrate to mobile use from desktop use, we also need to understand that mobile users may have different motivations, interests, and demands than desktop users. In concrete terms, product managers and user experience designers need to think about

the personas of mobile users when developing software.

In the long term, our current thinking (as always, subject to change as we learn) is that we will need to begin shifting away from a “mobile web” team existing as a distinct unit internally, and instead have every team at WMF develop responsive, multi-device functionality. This process will likely begin in the later part of the FY 14-15 period and conclude in the following fiscal year. As a result, all teams will need to become able to develop and design products that work for mobile-acquired as well as desktop-acquired editors.

While the mobile web team will be growing mobile development expertise across the organization, the app team will continue to focus on building a strong set of core applications and helping evolve the WMF infrastructure to be based on loosely coupled services.

Initial data from the mobile editing and mobile upload features launched in the last year show that the idea that mobile devices are purely useful for consuming content is a myth. Rather than thinking of contribution on mobile as a “nice-to-have”, we must consider mobile users equal participants in our community, and build functionality that suits different devices and usage patterns (including contribution features specifically optimized for mobile use, such as useful micro-contributions). We expect that users on mobile devices will play an ever-larger role in our editor community, and will contribute to the overall number of active editors.

We will also continue to invest in “Wikipedia Zero”, a groundbreaking WMF program designed to eliminate the cost of access to Wikipedia, especially for users in developing countries. The program currently delivers nearly 60 million page-views/month for free (February 2014 data). Beyond continuing to expand the network of participating mobile partners around the world, significant effort will be focused on increasing awareness of Wikipedia, e.g., by increasing visibility of Wikipedia on users’ phones (app preloads, default bookmarks, etc.) and through marketing efforts.

### **Key activities**

- Mobile web development: continued development of the readership and contributory experience on mobile web, including partnership with other product areas such as VisualEditor, Flow, and Growth.
- Mobile web mentorship: enabling the WMF to be an engineering/product organization prepared for development in a multi-device world by ensuring the required expertise exists in all development teams.
- Mobile app development: continued development of the Android and iOS Wikipedia apps, including partnership with other product areas such as VisualEditor, Flow, and Growth.
- Wikipedia Zero: partnerships with mobile operators and others to provide free access to Wikipedia on mobile devices, primarily to users in the developing world where data costs can be prohibitive.

### **Editor Engagement**

The purpose of this activity area is to grow and diversify contributors to the Wikimedia projects by making changes to the interface, design, and functionality of the Wikimedia sites.

To date, the total of contributor numbers across our projects remains stagnant. The English Wikipedia editor population is in a slow but continuing decline, offset by growth in some other languages and in non-Wikipedia projects such as Wikidata and Commons. While improving the basic user experience of MediaWiki alone may not put our projects back on a growth trajectory, it is without question a necessary component of this goal.

Editing an article or contributing a picture or video requires a level of technical competency that prevents users who may otherwise have valuable knowledge from contributing. The problem breaks down into four main components and a large number of smaller areas of improvement. The main components are:

- **Wiki markup**. Markup shifts the burden of making a feature understandable from the developer to the user.

This shift has the benefit of making it very easy to develop very powerful functionality with limited

development effort, as user interfaces optimized for discoverability and efficiency do not have to be developed for each feature. It has the downside of a very shallow learning curve, with even very experienced users often only having discovered a small subset of available functionality (frequently by copy and pasting markup rather than understanding the underlying constructs).

An easy-to-use, discoverable, efficient, and pleasurable user experience requires significantly more effort for any specific feature in order to achieve a short learning curve and high task effectiveness, even for advanced users. WMF has begun this effort with the VisualEditor, which now can be used to edit most content in Wikimedia projects, albeit not always with a user experience that meets the above criteria due to the complexity of the markup.

- **Everything is a page.** By creating dedicated namespaces for discussions, policy pages, various workflows, etc., MediaWiki developers have been able to provide functionality to users quickly. A lot of the complexity of developing functionality has shifted to the users themselves, who have created markup/template-based workflows in wiki pages for discussion, decision-making, organizing work, etc.

This approach suffers from the usability issues above. In addition, the efficiency of these workflows can be extremely poor. No discussion system other than wiki talk pages requires manually indenting and signing comments (even email clients provide more efficient workflows). No commonly used non-programming workflow outside of wikis requires copy and pasting complex templates from page to page in order to complete a task.

WMF has begun addressing this problem through the “Flow” project, which initially is narrowly focused on discussion workflows but may also tackle other workflows in the future, either implicitly (simply by making them obsolete in the course of building a modern discussion system for MediaWiki) or explicitly.

- **Wikis were built for collaboratively editing text documents.** Even MediaWiki, despite its name, is focused in most of its functionality on text collaboration. The workflows for contributing and editing media such as images and video are still very poor, and disconnected from the user experience of editing text.

The WMF first tackled this issue through the development of the Upload Wizard for Wikimedia Commons. In 2013-14, we developed a permanent multimedia team at the WMF focused on media experience and contribution issues. The initial focus of the team has been mostly on media experience, but we expect to put significantly more effort into media contribution in the coming year. The spirit of wikis is quickness, but adding a media file to an article can still be a slow, arduous process, not one that makes users feel the kind of immediate gratification that helped Wikipedia succeed in the first place.

In addition to better support for media files, we need to increasingly recognize structured data as critical to making content usable, discoverable, and connectable -- to provide a modern user experience. We will continue to partner with Wikimedia Germany in the development of Wikidata, and explore deeper integration in our projects, with initial focus on Wikimedia Commons to provide structured data for media files.

- **As wikis increase in complexity and depth, the new user experience suffers.** Most of the issues above are independent of the amount of content and policy and the size of our community. However, even if these issues were addressed fully, participating in the larger Wikimedia projects is inherently harder in the year 2014 than in the year 2001, due to the vastly increased complexity of the content, the policies governing editing, and the size of the community.

This has led to a significant increase of warnings and reverts for new users, even in response to contributions that would have been acceptable in the early years. There are more things that new editors have to learn, beyond the already mentioned technical complexity. Learning about all the expectations around notability, verifiability/sourcing, stylistic guidelines, etc. is a slow, incremental process, with a significant amount of negative reinforcement as the primary mechanism to guide user behavior.

Nor do these changes in Wikimedia’s user experience exist in a vacuum: While Wikimedia has become a more difficult environment to join, the rest of the web has become more open, inviting, and encouraging by using a variety of techniques to reward participation. (Not all these techniques apply to Wikimedia’s mission, but they nevertheless may attract people who would have contributed to Wikimedia 10 years ago but now spend their time on social media.)

In order to meet this challenge, the WMF has built a small “Growth team” which is narrowly focused on increasing the number of productive new users in a measurable way. In 2013-14, that team focused on improving the sign-up funnel and helping new users discover simple editing tasks.

In 2014-15, we expect to continue to invest in the onboarding experience for new users. We also plan to experiment with a more personalized recommendation engine for editing tasks that will more successfully help users discover work in Wikimedia projects that appeals to them.

If tasks can be identified that are useful and important but that don’t require grasping the full complexity of Wikimedia projects, we may be able to build significant populations of users who can focus on these tasks without necessarily becoming heavy contributors.

Finally, we are currently experimenting with content translation as a potential additional form of contribution to effectively support with the software. By making it easy to translate articles from one language to another, we may be able to appeal to a class of contributors that are currently not very active in our projects.

As noted earlier in the "Mobile" section, in the development of this functionality we cannot afford to treat mobile devices as an afterthought. We will put increasing effort into providing mentorship and resourcing to teams working on the aforementioned efforts in order to enable a satisfying user experience across devices.

The overall goal of these efforts will be to increase the number of contributors to our projects. This will likely be measured in contributing to the number of Total Active Editors (users with  $\geq$  five mainspace edits/uploads per month). In addition, we will iterate on qualitative goals for projects that are expected to achieve quantitative impact over the longer term (Flow, VisualEditor).

### **Key activities**

- VisualEditor: a rich-text editor that is designed to serve as the default editing environment for our projects.
- Flow: a structured discussion system initially targeting the talk namespaces in our projects, including user-to-user discussion.
- Growth: features aimed directly at acquiring more contributors and encouraging them to contribute more (e.g., teaching new editors via interactive guided tours, providing task suggestions to drive further contribution).
- Multimedia: features aimed at improving the media experience, including media contributions.
- Content Translation: functionality aimed at making it easier to translate Wikimedia content from one language to another -- a class of contribution not currently well-supported by the software.

### **Nontechnical Movement Support: Grants, Evaluation, Legal Support and Communications**

The purpose of this activity area is to provide direct support to the Wikimedia projects through nontechnical means, including by providing funding of various kinds, programmatic evaluation support, and legal defense. The work described here is carried out mainly by the Grantmaking, Legal and Community Advocacy, and Communications teams.

**Grantmaking** aims to increase the quantity, quality, diversity, and reach of free knowledge by supporting people and organizations aligned with the WMF mission. We offer grants and other resources to individuals, groups, and organizations working on building community and growing content on Wikimedia projects and sites as well as related open knowledge projects. We are committed to supporting under-resourced and emerging regions, languages, and communities, particularly in the Global South, with a

specific focus on high-potential communities and projects.

Grantmaking runs four main grants programs:

- Annual Plan Grants (reviewed by the nine-member [Funds Dissemination Committee](#) or FDC), that offer unrestricted, general support funds for the annual plans of recognized Wikimedia organizations (chapters and thematic organizations).
- Project and Event Grants (reviewed by the 28-member [Grant Advisory Committee](#) or GAC), that primarily support offline projects and events run by Wikimedia organizations and emerging groups.
- Individual Engagement Grants (reviewed by the 17-member [Individual Engagement Grants Committee](#) or IEGCom), that support experimental projects led by individuals or small teams, and are primarily aimed at online impact on Wikimedia projects.
- Travel and Participation Support (reviewed by the three-member [TPS Committee](#)), which is run in partnership with the German and Swiss Wikimedia chapters, and supports the active participation of Wikimedians in non-Wikimedia events.

In addition, Grantmaking offers scholarships to Wikimania (reviewed by the nine-member [Scholarships Committee](#)), and Partnership Grants to support partnerships with significant allied organizations -- particularly in the Global South -- that support our communities in expanding reach and participation.

**Legal and Community Advocacy** supports and defends the community and its contributions when movement values are at stake. Additionally, it maintains the trademark portfolio and works on privacy issues. In 2014-15, the team will develop a variety of on-wiki training materials for the community, staff and Board. This team also helps support productive communication and collaboration among the WMF, the global Wikimedia volunteer community, and our millions of readers.

**Communications** aims to ensure fast, easy information flow about Wikimedia in multiple languages, both within the movement and outside of it. This will involve answering media requests from international journalists, proactive media outreach, maintaining the Wikimedia Blog, using social media to communicate the Wikimedia story, and monthly and annual reporting on the work of the WMF.

*For more detail on the work of these teams, please see the "Ongoing Work Areas of the Wikimedia Foundation" - on pages 29 - 49.*

Through Nontechnical Movement Support, the WMF supports the Wikimedia communities with grants, and with ideas, motivation, tools, skills, connections, capacities, data, and research. We fund a range of movement actors and focus on volunteers. From established organizations to emerging groups and individual contributors, we believe that volunteers are the heart of the Wikimedia projects, and try to match their needs with our resources. We seek significant online impact. While we support a range of activities from offline outreach work to online initiatives, we expect most of these activities to directly or indirectly improve the online presence and quality of Wikimedia projects, and the environment for free knowledge that makes this possible. We prioritize diversity. We are committed to deepening and expanding our Global South communities and content, as well as addressing the gender imbalance in our projects. We support work across multiple Wikimedia projects.

The Grantmaking Team's Global South strategy includes being responsive to needs from communities across the Global South, and being proactive in supporting the growth of community and content in nine of the most high-potential geographies/language communities across the Global South. The team's focus on diversity also includes exploratory work in challenging the current gender gap issues of the Wikimedia movement.

## Key activities

### Significantly expand resources for individual contributors.

- Increase experimentation with different types and methods of supporting individuals. Use pilots to identify the most impactful methods of reaching and supporting online contributors to various projects, and then scale that which is proven effective. In particular, test and iterate on a strategy of providing simple ways for editors to access micro-resources (such as books or journal subscriptions) and micro-grants.



- Engage in community consultations (on-wiki and at in-person Wikimedia events) with multiple strategic language communities to determine what's working in existing grants for individuals, and to identify new areas for experimentation and new ways to reach these contributors.
- Organize two global grantmaking campaigns with a focused/thematic request for ideas aimed at attracting and supporting more community initiatives to improve diversity.
- Redesign the Travel and Participation Support program to ensure resources that help support a greater number of contributors in the most effective ways possible.
- Expand the Individual Engagement Grants program (now out of its pilot period) to explore and expand on successful ideas that best support a range of individual contributors who in turn support our online communities around the world.
- Resources requested to support this key activity are a 33% increase in Wikimania Scholarships, a 43% increase to Project and Event grants, of which about 20% goes to individuals and small groups, and a 124% increase in Individual Engagement grants. In addition, we are requesting an Individual Grants Officer to support this work.

**Increase usability and skills for more impactful grantmaking to, and programs by, Wikimedia organizations and groups.**

- Continue to refine the Annual Plan Grants/FDC process and the Project and Event Grants program by incorporating ongoing recommendations from the FDC, the FDC Advisory Group, the GAC, and the community at large.
- Continue to iterate on proposal and reporting requirements across grants programs, in order to make processes as responsive and flexible as possible; lessen requirements where appropriate as per recommendations from KPMG and others.
- Support greater impact and innovation by Wikimedia organizations through increasing impact analysis and comparative studies across different kinds of Wikimedia organizations.
- Provide training to grants committee members to develop capacity for proposal evaluation.
- Offer Project and Event Grant templates and guidelines for well-understood programs and events (e.g. a single-language writing contest, a series of editathons, WLM), including sample budgets, relevant metrics, and pointers to tools (e.g. WikiMetrics, Glamorous).

**Ensure the integration of the Wikipedia Education Program and the Program Evaluation and Design team:**

- Build out a successful Learning and Evaluation team that is both community-facing --supporting the community's needs for tools and data and facilitating a shared culture of self-assessment-- and is internally focused on data-empowered grantmaking decisions; this team will then focus on both program and organizational effectiveness.
- Ensure the successful transition of the Wikipedia Education Program into a facilitative hub for education programs globally that also helps coordinate across the department on shared goals of both Global South and gender diversity.

**Create a shared learning and evaluation framework to help us understand better what "success" means in the movement, and how it can be achieved.**

- Make evaluation and learning a shared culture of practice across the movement, through self-assessment and through maintaining volunteer motivation as a central aspect of the learning and evaluation framework.
- Continue and deepen the evaluation and learning from Wikimedia programs, including through coordinating voluntary data reporting, and creating high-level analysis and reporting of significant Wikimedia programs.
- Monitor the effectiveness of at least two grantmaking campaigns or thematic requests for proposals.
- Develop a network of volunteers with valuable, targeted skillsets (e.g. research methods, design, software development, event planning) to participate as IdeaLab mentors.
- Coordinate at a high level within the Grantmaking department on collaborative program evaluation projects, as well as collaborate on strategic planning and monitoring of the program evaluation capacity-building initiative through meetings and strategy sessions within the Grantmaking department, WMF, and our community of program leaders.

**Create, coordinate, and collate tools, toolkits, datasources, and training to ensure a culture of impact-driven self-assessment and shared learning and mentoring in the movement.**

- Conduct analysis of different movement organizations, including their growth and formation pattern.
- Develop governance toolkits (in collaboration with Legal and Community) for organizations.
- Build learning materials online, categorized by programs and organization types.
- Create program toolkits and packages of materials for grantees to do self-evaluation (e.g. dashboards, data compilation.)
- Provide direct training and capacity-building supports along with a centralized hub for resources related to Wikimedia program evaluation.

**Significantly increase our focus on diversity--both in the Global South and on gender.**

- Facilitate the development of an executable gender gap strategy through two diversity-focused events (on and offline).
- Organize two grantmaking campaigns with a focused/thematic request for proposals aimed at attracting and supporting more community initiatives to improve diversity.
- Continue to experiment and expand successful grantmaking pilots to support individual contributors in the Global South.
- Generate grantmaking leads from the work done by the Head of Global South Partnerships in the Global South.
- Explore additional external partners in the Global South for potential Partnership Grants in high-potential regions.

**Grantmaking Targets**

1. By end of June 2015: Disseminate up to \$8.2 million in grants that contribute to growing Wikimedia community and content, particularly by increasing support to individual contributors (at least 7% of total grants spending, directly supporting at least 1,500 contributors<sup>2</sup> and indirectly supporting at least 5,000 contributors) as well as the Global South (at least 20% of total grants amount and 60% of number of grants). (Baseline for individuals: 2013-14 YTD grants to individuals ~4%; baseline for Global South: 2013-14 YTD grants to Global South ~18% in share of \$ and ~51% of total # of grants.)
2. By end of June 2015: Increase support to challenging the gender gap to at least 1.5% of total grants spending, and host at least two diversity events in order to build out an executable gender gap strategy. (Baseline: 2013-14 YTD grants to gender gap issues ~1%.)
3. By end of June 2015: Work closely with Arab World education program leaders to increase the number of student editors to 300 per term, and add 14 million bytes of content to the Arab Wikipedia. (Baseline: ~ 200 student editors/term and ~10 million bytes/term.)
4. Continuous: Continue to iterate on proposal, review and reporting requirements and guidelines for all our grants programs to make processes as user-friendly, responsive, and flexible as possible.
5. Strengthen the self-assessment learning and evaluation framework and structure to evaluate the effectiveness of Wikimedia programs and organizations. By end of June 2015:
  - Deepen the data on existing Wikimedia programs by updating the current seven program evaluation reports, and analysing three new programs.
  - Develop program toolkits for at least three Wikimedia programs and impact reports for at least two grantmaking programs/campaigns.

<sup>2</sup> "Direct support" in this context is intended to refer to support of individual contributors/editors. The exact definition used to assess this will be developing at the beginning of 2014-15.

## Key Targets and Milestones

Wikimedia's Engineering/Product Department maintains goals/targets with revisions on a quarterly basis at: [https://www.mediawiki.org/wiki/Wikimedia\\_Engineering/2014-15\\_Goals](https://www.mediawiki.org/wiki/Wikimedia_Engineering/2014-15_Goals)

High level summary of top priorities are found below. Should we depart materially from the below, we will let the Board know.

### Infrastructure

- **Site Infrastructure:**
  - **Current state (June 2014):** Our highest priority is the build-out of our new secondary data-center in Dallas, Texas. In addition, we are continuing our emphasis on protecting user privacy, and on improving site performance.
  - **Key milestones:**
    - *Site reliability:* We will conduct the first (from then on quarterly) failover test from the Ashburn to the Dallas data-center by the end of the fiscal year, to ensure site reliability in case of major incidents.
    - *User privacy:* We will enable perfect forward secrecy for SSL and encryption for cross-data center links by the end of the second quarter.
    - *User privacy:* We will target sending all search engine traffic to the HTTPS version of Wikimedia projects by the end of the fiscal year (HTTP access will likely remain available).
    - *Site performance:* We will migrate to HHVM as the execution engine for most PHP code by the end of the second quarter, to improve performance especially for logged-in users. We will establish initial baseline and targets for site performance improvements by July 1.

### Mobile

- **Mobile Web:**
  - **Current state (June 2014):** We launched mobile editing at the beginning of the fiscal year and, as of end of May, we count >20,000 users who make at least one mobile edit per month, dramatically exceeding our original goal of 6,000 users. We've made many improvements to the mobile editing experience since last year, and deployed VisualEditor for tablet users in alpha-mode..
  - **Target:** We will develop an initial target for mobile contributions by July 1, 2014, as we determine the right balance between platform-level work and partnership with other teams (to help the organization as a whole develop for multiple devices) and mobile-specific contribution mechanisms. As noted below, an additional key measure of success for the year will be to help the Flow and VisualEditor teams to become ready for development across devices.
- **Mobile Apps:**
  - **Current state (June 2014):** We are relaunching the Android and iOS apps as native apps in June/July, with editing functionality from the start.
  - **Key milestone:** We will develop a first roadmap for contributory features in the first quarter, based on initial baseline data for the rebooted apps. Our primary goal with the new apps will be to drive contributions, not readership though we will continue to monitor general usage/readership trends on apps.
- **Wikipedia Zero:**
  - **Current state (June 2014):** Wikipedia Zero serves 65M free pageviews/month (end of May). This is significantly in excess of our original goal of 35M pageviews/month. Our goal in the next year is to continue to grow Wikipedia Zero pageviews by increasing the number of partnerships, reducing the effort that goes into each partnership, and more

effectively marketing the program to existing and potential users.

- **Target:**
  - **Low-end:** 100M free pageviews/month. If we do not hit this target, we may need to fundamentally revisit the program's strategy.
  - **Moderate:** 125M free pageviews/month. If we hit this target, we will continue to iterate and improve.
  - **High:** 200M free pageviews/month. If we hit this target, we will strongly reinforce patterns of success, potentially including additional staffing support.

## Editor Engagement

- **VisualEditor:**
  - **Current state (June 2014):** VisualEditor is the default editor when clicking the "Edit" tab in >160 Wikimedia wikis, introduced as "Beta". The English, German, Spanish and Dutch Wikipedias, as well as some unsupported languages, require explicit opt-in, in response to community discussions in those wikis. Baseline metrics exist for adoption and performance.
  - **Key milestones:**
    - We will begin re-engaging the English Wikipedia community about shifting VisualEditor from opt-in to opt-out usage in Q1, targeting Q2 for a gradual ramp-up and eventual shift to opt-out to occur. This is subject to community discussion which may impact scope and timelines.
    - We will begin similar engagements with Spanish, German and Dutch Wikipedias in Q2, targeting Q3 for gradual ramp-ups and eventual shifts to opt-out, also subject to community discussions.
    - By the end of the fiscal year, the team will be a multi-device team, ready to maintain and develop the user experience for phones, tablets, and desktops.
- **Flow:**
  - **Current state (June 2014):** Flow is an experimental but already feature-rich alternative to talk pages which can be enabled by WMF on a per-page basis and is currently used in production on a small number of "real world" pages, including a couple of WikiProjects and feedback pages for new features.
  - **Key milestones:**
    - We will aim to cover one major set of new deployments per quarter, carefully picking use cases. Example use cases may include: additional WikiProjects, shared conversation spaces like Teahouse and Village Pump, entire wikis willing to switch to Flow, etc. Success will be reflected in adoption/participation metrics, targeting improved participation dynamics relative to talk pages.
    - By the end of the fiscal year, we expect to cover one major use case thoroughly (e.g. all user talk pages, all Village Pump type pages, etc.).
    - By the end of the fiscal year, the team will be a multi-device team, ready to maintain and develop the user experience for phones, tablets, and desktops.
- **Growth:**
  - **Current state (June 2014):** The Growth team has tested and launched several successful products this year, including improvements to on-boarding of new users, providing guided tours for first-time editors, inviting unregistered users to sign up, and a new draft space for article development. Based on controlled testing, the team's greatest gains have been in increasing the rate of newly-registered users who make one or more edits on Wikipedia.
  - **Targets:**

We have selected the following targets to be met *by June 2015*:

    1. Acquisition: we will increase (compared to a control) **new registrations** across Wikimedia projects.
    2. Activation: we will increase (compared to a control) the rate at which new registrations become active editors (5+ content edits/month).
    3. Retention: we will increase (compared to a control) the **survival rate of active editors** on Wikimedia projects.

By July 1 2014, we will have selected precise targets for each of the three conversion

rates above, by extrapolating based on current baselines (including the year-over-year rate of change) and the results of previous experimentation (where applicable).

### Nontechnical Movement Support

Disseminate up to \$8.2 million in grants that contribute to growing Wikimedia community and content, particularly by increasing support to individual contributors (at least 7% of total grants spending, directly supporting at least 1,500 contributors<sup>3</sup> and indirectly supporting at least 5,000 contributors) as well as the Global South (at least 20% of total grants amount and 60% of number of grants). By end of June 2015. (Baseline for individuals: 2013-14 YTD grants to individuals ~4%; baseline for Global South: 2013-14 YTD grants to global south ~18% in share of \$ and ~51% of total # of grants).

<sup>3</sup> "Direct support" in this context is intended to refer to support of individual contributors/editors. The exact definition used to assess this will be developing at the beginning of 2014-15.

## Board Resolution

RESOLVED, that the Board of Trustees hereby approves management's proposed 2014-15 annual plan, which includes \$58.5 million of revenues, \$58.5 million of spending, with no increase to financial reserves. If, during the year, management anticipates the reserve at each quarter-end will differ materially from the plan, the Board directs management to consult the Chair of the Audit Committee promptly. Reference: Management's currently anticipated quarterly breakdown of this approved annual plan.

### Quarterly Breakdown of the Annual Plan

	<b>Q1</b> (July - September)	<b>Q2</b> (October - December)	<b>Q3</b> (January - March)	<b>Q4</b> (April - June)	<b>Total</b>
Cash Revenues	6.0	28.0	7.6	16.9	<b>58.5</b>
Cash Spending	13.1	12.9	18.0	14.5	<b>58.5</b>
Net	(7.1)	15.1	(10.4)	2.4	<b>0.0</b>
Reserve	35.1	50.2	39.8	42.2	<b>42.2</b>

*All amounts USD, in millions.*

## Appendix: Risks Considered in Developing 2014-15 Plan

*Every year in the development of the annual plan, the WMF evaluates the risks facing the organization and the movement, and documents whether and how they are being mitigated.*

### Community/Product Related Risks

**We know that making Wikimedia projects a welcoming environment for new users requires radically overhauling the user experience on all levels, which can trigger change aversion among existing editors.** Change in a living, breathing community context is challenging and can cause projects to be delayed or derailed, especially when parts of communities become entrenched with status quo practices and products. As history shows, such entrenchment could result in an ossified platform that does not welcome new editors and contributors. Also, if the WMF does not communicate effectively in advance of expected changes, their benefits, and the realistic expectations in rolling out complicated product, community reaction could be negative, further impeding or delaying beneficial innovation.

*Response:* We have put increasing emphasis on the development of the Community Engagement function at the WMF, and in 2014-15 we will launch a new sub-department in Product aimed at embedding community engagements into the lifecycle of product development. In 2014-15, all key initiatives will have liaison support. We have also built, and will continue to develop, frameworks such as BetaFeatures and GuidedTours to aid in the gentle introduction and ramp-up of new site functionality. We will continue to put a priority on work that is important but does not usually result in community resistance -- such as mobile and improving the onboarding experience of new editors -- in addition to areas that our existing community may have stronger opinions about. We expect that the liaisons will help ensure trust and allow most of our community to accept the need for change and innovation to ensure the best ways of creating and delivering free information in a highly dynamic online world. Yet there will be loud voices who disagree, and we will need to simply work with those points of view while moving forward to set us up better for the future.

**Building large-scale, high-performance features that cover the breadth of technical complexity found in our projects (content, user-created scripts, tools and templates, and community processes) is challenging.** It may take more time than expected, and may force trade-off decisions that are unpopular with our community.

*Response:* Operating in a context of high complexity necessitates understanding the potential impact of a change early. WMF has dramatically reduced the elapsed time between code being developed and code running on our production cluster, and we will continue to do so as part of continuous optimization of the development, deployment, and testing processes, with significant focus on automation. In 2014-15, we will also likely need to begin engaging with the community regarding technical debt in community-created code, such as templates and gadgets, especially insofar as it directly impacts our ability to modernize the user experience.

**A competitor could provide an interface (reading, editing, or both) that is significantly better than ours.** Many third party apps exist across iOS and the Android marketplaces that primarily support access to reading Wikipedia. If any of these apps were backed or acquired by a well-funded Internet company they could pose a threat to our current, dominant platform for the projects. A major Internet company could also make major investments in deeper functionality or services for a competing interface (web or app based), and heavily market them against the Foundation's offerings.

*Response:* So far, apps in general and third party apps specifically make a very limited contribution to our reach. Identified third party apps make up about 10% of our app traffic, and app traffic (including third parties) makes up about 7% of our mobile traffic (preliminary figures). There are only a very small number of efforts to enable editing through third party applications, primarily due to the limited commercial incentives. In other words, there is little evidence of an emergent threat to readership or contributions specifically from third party apps.

The WMF has made large investments in 2013-14 in improving our mobile app and web offerings, including a reboot of the Wikipedia apps for Android and iOS, which now include editing functionality. These investments will continue in 2014-15, and will help us establish what the appropriate role of apps should be vis-a-vis readership and contributions. We've also begun making improvements primarily targeting readers, including changes to typography and layout, image display, etc., which should mitigate the risks of other platforms providing a vastly superior reading experience.

**Wikimedia's ability to implement positive change could be constrained by lack or loss of community goodwill towards the WMF.** Our community has a large, diverse, and occasionally competing set of needs: it isn't possible to make everybody happy. When we release high-visibility products, policies, or other initiatives, we risk damaging our goodwill with the community if we do not build in notice and consultation processes or do not respond to their feedback. The growth of the projects depends on the community's willingness to support our work and partner with us.

Increased transparency and intensive interaction with the community may not always generate more goodwill and trust, and we continue to need to negotiate significant changes that affect our users. In some cases, the needs of different users may be irreconcilable. We also face a communication challenge, ensuring that we are responsive to the needs of our wider community--including those speaking our 287 languages--instead of only a small number of vocal users.

*Response:* During 2013-14, the WMF engaged in a number of successful initiatives to forge a close working relationship with the community and to increase transparency, goodwill, and collaboration. Efforts in 2014-15 are expected to continue to build on these strategic responses. Past examples include:

- **On-wiki community consultations**, which covered areas such as the Privacy Policy and the Trademark Policy. The discussions frequently totalled hundreds of thousands of words, and allowed the WMF to consult with the community and answer difficult questions about our priorities. A proposed amendment to the Terms of Use on undisclosed paid editing has become one of our largest consultations: within one week, the discussion had 170,000+ words from 1,000+ users. These community consultations allow the WMF to improve our decisions and policies through transparent collaboration.
- **Transparency through the Wikimedia blog and regular reporting**. The WMF publishes detailed, monthly activity reports, hosts public metrics meetings with presentations on key initiatives, and publishes quarterly reviews of high priority WMF initiatives. These transparency initiatives allow our community to see the WMF's current activities and plans. The Wikimedia blog includes regular updates on activities in the Wikimedia movement, totaling 207 posts in July 2013 - January 2014, including 45 posts in multiple languages.
- **Site visits**. The Chief of Finance and Administration and head of Grantmaking piloted site visits to Wikimedia organizations and communities around the world to assist on matters ranging from grantmaking, financial reviews, and discussion of best governance practices. We feel these visits helped build trust, strategic clarity, and improved communications with chapters and others.
- **Legal protection of the community and our values**. We continue to help facilitate the defense of users and functionaries when appropriate, and win matters that are properly perceived as protecting the community. For example, the WMF is supporting [a Greek Wikipedia user](#) in an action brought by a Greek politician that we and the community believe is unjust.

We continue to grow in our understanding of how to effectively collaborate with our community. To that end, in 2013-14 we built out our team of community advocates, in addition to the previously-existing headcount, inside the Legal and Community Advocacy department. In 2014-15, the Community Advocacy team will continue to support high-value strategic initiatives. Additionally, the Director of Community Engagement will work with the community on product roll-outs and related communications on an ongoing basis.

## Environmental Risks

**Mobile and shift to consumption:** While the continuing rapid increase of mobile usage (smartphone and tablet) represents an opportunity for consumption and some forms of contribution (e.g., photos, location), it represents a potential threat for text-based contributions, particularly article writing, if users shift towards using mobile devices.



*Response:* In 2013-14, the release of mobile editing on smartphones outperformed our expectations, suggesting that, despite our previous assumptions, users are interested in editing from mobile devices. We've improved and expanded our existing photo uploading applications and workflow on the mobile web. In 2014-15, we will offer editing in our Wikipedia Android and iOS apps, and port the VisualEditor to tablets. We will also explore different ways to use capabilities enabled by smartphones (touch interfaces, camera, and location) to encourage people to contribute (e.g., microcontributions).

**Decline in desktop page views:** We have observed a decline in desktop page views to our projects. Hypotheses explaining this decline include increased aggregation of Wikipedia-derived information in search engines, the shift to mobile, and a switch by users from search to social media. While we do not know whether this decline reflects a more sustained trend, there is a potential risk that fewer users will visit our projects in the coming years. A decline in readership could negatively impact our efforts to increase contributorship on our projects as well as our online fundraising efforts.

*Response:* We are continuing to research readership trends (e.g., referral analysis, improved descriptive statistics). We are working with Google to better understand any impact changes may have on our page view traffic. We are improving our ability to track non-standard views (e.g. via API or third party integrations). We are improving our mobile app offerings to investigate if we can increase the contribution of apps to overall viewership on top of what we're seeing on mobile web. Wikipedia Zero is not currently a major driver of page view growth, but it is positioned to help accelerate growth of readership and contributions in developing countries in the long term. Finally, site performance can have an important effect on readership, and we've had some significant and preventable performance regressions in 2013 which have since been fixed. We've since strengthened our performance engineering efforts and monitoring of deploys for performance regressions.

**Inability to raise and retain the numbers of contributors:** The Wikimedia projects rely on a healthy community of volunteer contributors to ensure the overall quality and scope of the projects. A declining number of contributors means less new knowledge added across the projects, as well as fewer editors to remove vandalism and ensure standards for new articles. Any of these factors could in turn reduce confidence in the projects and impact readership and financial contributions.

*Response:* The WMF continues to make the recruitment and retention of contributors core to its product development and programmatic initiatives. New features and functionality for the projects are aimed at simplifying how users contribute to the projects (such as improving the editing and upload processes) and increasing the activity and retention of new editors. The WMF will continue to use a data-informed approach on how to attract and retain new editors. The WMF's grantmaking and global education work places a strong emphasis on supporting volunteer efforts aimed at recruiting and retaining contributors globally, with a special focus on traditionally less represented geographies and languages.

## **Organizational Risks**

**Recruiting:** The shortage of Bay Area technical talent could hurt our ability to recruit and retain technical staff. The job market for engineers began heating up in 2010, and continues to be extremely competitive. The Wikimedia Foundation, as a nonprofit, does not offer equity. The organization therefore faces a potential risk of not being able to hire the key engineers, designers, product managers, and other staff needed to deliver on this plan.

*Response:* In recognition of the challenging hiring environment, we have placed increased focus on developing internal technical recruiting expertise. We now have dedicated technical recruiters, and have begun hiring administrative support for HR with experience in the internet industry. We have earmarked a position for Human Resources for 2014-15, which will be allocated towards whatever best supports Product and Engineering; if necessary, it will provide additional recruitment support. We also know that competition in the Bay Area may result in us increasing the proportion of new hires who are remote, and therefore we have designated resources for a multi-department initiative designed to significantly improve administrative processes and systems for remote staff. (This will involve, for example, the creation of systems for paying non-US staff in their local currency, and supplemental vendor relationships to support the needs of product and engineering internationally.)

**Movement governance issues could detract from other priorities.** Wikimedia organizations continue to operate with high visibility, which presents a potential risk that governance issues for a Wikimedia organization may have impact on the WMF and other groups and organizations within the Wikimedia movement. Wikimedia organizations continue to grow rapidly and enjoy international attention based on the Wikipedia and Wikimedia brand. At the same time, Wikimedia movement organizations sometimes lack governance resources and models, especially resources tailored to our online-first, decentralized, and international community.

In the case of a governance scandal in a large chapter, for example, we would need substantial managerial, legal, governance, and communications resources to handle the situation. On the other hand, we risk imposing overly burdensome governance requirements and stifling the development of smaller organizations. Overall, the absence of a comprehensive movement roles strategy means that governance risks are addressed in an ad hoc fashion, which may risk damaging community goodwill and creating a suboptimal governance system. Movement friction continues to drain time and focus from the WMF and other movement organizations, which risks creating an excessive focus on internal issues and politics, as opposed to setting priorities and channeling energy on achieving more critical mission objectives.

*Response:* This year, we published a new [Wikimedia Foundation Board Handbook](#), which provides details about the operation and procedure of the WMF's Board. Although the exact needs of each movement organization will depend on the jurisdiction, the Board Handbook may serve as a general model for other larger movement organizations.

Our grantmaking processes, reporting requirements, and agreements continue to be the main mechanisms for governance oversight. In 2013-14, the FDC process highlighted concern over how chapters were handling potential conflicts of interest and managing reserve funding. With the help of external governance experts and the community, we hope to provide targeted policies and training programs to address these governance needs identified by our community groups and grantmaking committees.

Based on the Board's recent decision to encourage informal forms for new groups, we hope that our movement will place more focus on programmatic impact rather than corporate bureaucracy. However, less formal structures may potentially decrease the oversight on lower-profile risks. Without a comprehensive movement roles strategy and greater clarity about the roles of movement organizations, we will have difficulty properly calibrating the amount of formality and attention for governance within the Wikimedia movement.

**The bulk of Grantmaking resources may not be effectively achieving programmatic impact or supporting our online communities as most needed.** In 2013-14, the WMF launched a Program Evaluation team designed to begin assessing the effectiveness of Wikimedia's programmatic activities. That team has now produced seven reports. The data are sparse and imperfect, but it's clear that we are not in a position where we can claim that our grantmaking consistently funds programmatic work with a strong, demonstrated impact on our mission.

*Response:* We will restructure the Program Evaluation and Design and Learning and Evaluation teams to create a more integrated impact and learning strategy for grantmaking and the movement as a whole, and we will keep facilitating conversations among movement leaders to identify and document best practices. The key challenge for the movement is to design, implement, and assess successful programs, and the Learning and Evaluation Team will be deepening its work, including through further analysis and creating or collating self-assessment tools, toolkits, data sources, and training. We will continue to document and analyze movement-wide activity and learning around Wikimedia programs (expanding our analysis from the seven program reports we've already created), and we will create toolkits and guidelines that will help the community design and evaluate its work more effectively. We will also continue to facilitate work in growing leadership, governance, and strategic planning skills alongside movement leaders and organizations, and with expertise from outside the movement. Additionally, informed by the work on programmatic and organizational effectiveness, we will facilitate and support conversations on the overall goals and objectives of the Wikimedia movement, and examine the levels of impact different types of formal and informal organizations can have through online and offline activities. We will continue research into other movements, and our own, including through site visits to Wikimedia organizations and communities, in an effort that helps us partner with community leaders to ask tough questions, discuss strategy, and share good practices. Additionally, we will increase resources to support

individual volunteers and contributors, and will redesign the Travel and Participation Support program. We will aim to expand diversity, both through more coordinated efforts on the gender gap and through our proactive Global South focus strategy. In 2014-15, Grantmaking will aim once again to hit a seven percent or greater target in grants and other resources to individuals, with the expectation that it will deepen our support of on-wiki engagement and activities, and improve editor retention and recruitment.

**The WMF has a new Executive Director, which may result in disruption that could inhibit the organization's ability to execute the plan.** The WMF is delighted to be welcoming its new ED in June 2014, just a month before the beginning of 2014-15. The recruitment process was thoughtful and deliberate, and has resulted in the selection of an ED who we believe will further and extend the organization's capabilities. However, new leadership is inherently accompanied with a period of disruption, and it's possible that could make it harder for the organization to achieve the goals laid out in this plan.

*Response:* Any leadership transition is an investment in the future: the organization is suffering a short-term hit to productivity, in anticipation of future gains. The WMF anticipates and accepts some amount of disruption. That said, the incoming ED has been thoughtfully on-boarded, and the outgoing ED will be actively supporting the new ED as she gets oriented. Further, this plan has been designed to be flexible and to accommodate the ED's newness. The new ED has full authority to move money around and course-correct as she sees fit. A "stage-gate" has been built into the hiring plan, so that she will have time to learn the ins and outs of the non-P&E parts of the organization before new staffing investments are made. And, although it would be an overstatement to say the incoming ED had been involved in the development of the plan, the outgoing ED did consult with the incoming ED on a few key questions during its development, and has attempted to faithfully represent her views and priorities.

**The international legal context could shift in ways that threaten the Wikimedia projects.** The Wikimedia projects' ability to achieve the Wikimedia mission can be thwarted by legal changes around the world. The past year has seen an increasingly diverse set of challenges in this area:

**Free and open internet.** The free and open internet remains under attack, which threatens the projects. We have watched as governments, ISPs, and other parties around the world continue to inhibit people's ability to read and/or contribute to sites like Wikipedia. Some countries -- such as Bahrain, Belarus, China, Iran, Saudi Arabia, Russia, and Vietnam -- attempt to inhibit people's participation in online activities in a systematic fashion using such methods as filtering or removing content, imprisoning people who create or share certain types of material online, or shutting down or slowing down people's Internet access.

Other countries and their citizens -- including those that are not traditionally known for censorship such as France, India, Greece, and Italy -- have attempted to use local legislation, litigation, or police action against the WMF or our users in ways that could squelch free speech and set precedent leading to civil or criminal penalties against the WMF, movement organizations, and users.

**Copyright.** Copyright laws continue to evolve around the world in ways that could impact Wikimedians. Most notably, the European Union appears to be moving towards comprehensive copyright reform. If implemented correctly, this could resolve existing problems and make more existing content available for Wikimedians to reuse and build on. If implemented poorly, it could increase barriers to sharing and creation of information, or increase risk for the WMF by potentially eroding safeguards that protect us as an intermediary. The Trans-Pacific Partnership, a trade agreement, could also have implications for copyright law in almost a dozen Pacific Rim countries with similar risks.

**Net Neutrality.** At its core, the Net Neutrality principle aims to ensure that ISPs comply with the end-to-end principle to deliver content on the Internet with equal speed. Well-formulated net neutrality laws protect sites like the Wikimedia projects by preventing ISPs from downgrading access to sites that cannot afford to be in the fast lane. In essence, net neutrality laws provide for free access to information. Wikipedia Zero similarly works towards that goal by committing mobile carriers in the Global South to waive data fees for accessing Wikipedia. It represents Wikimedia's commitment to a world where every single human being can freely share in the sum of all knowledge. Net neutrality laws must therefore be carefully structured to facilitate the free access to information provided by Wikipedia Zero.

If not implemented carefully, laws could have the unintended consequence of making it impossible for educational information to be made freely available. One example can be found in the Dutch Telecommunications Act, which prohibits Internet providers from charging subscribers differently based on the services they are accessing. If such a law were to be adopted in a country in the Global South, it could prohibit mobile carriers from giving people who cannot otherwise afford it free access to read and edit Wikipedia through Wikipedia Zero.

*Response:* The WMF does not participate in or condone efforts to inhibit people's access to knowledge online; we provide the same, uncensored service for everyone in the world. In 2013-14, we acted to defend this position in a variety of ways, including defense against legal threats from around the world demanding removal or alteration of content on Wikimedia projects, and against defamation lawsuits initiated in Germany, Italy, and India. Most importantly, we have continued to find help to defend contributors (both publicly and privately) from baseless legal threats through our Legal Fees Assistance Program and Defense of Contributors Policy. We sought to address reader concerns about surveillance, and participated in broader advocacy around that issue where appropriate. On copyright, we have continued to monitor the situation and look for opportunities for partnerships, such as our cooperation with the Free Knowledge Advisory Group (EU) on a recent EU consultation. More broadly, we have continued to work with Wikimedia volunteers interested in advocacy issues through the advocacy-advisors project, which we believe will continue to drive engagement on a variety of policy issues in 2014-15 (while staying within our non-profit legal constraints).

**Revenue targets could not be met.** The 2014-15 revenue target for WMF is an increase from our prior year projections. It is possible we cannot meet that target. Potential risk factors include decline in readership in high-income countries (where most of our revenue is raised), possible reduced effectiveness of last year's banners, and possible failure to discover a new kind of banner that works as well. Users could also take our projects' content for granted and in turn stop donating or contributing. Alongside the potential risk identified above regarding recent movement of page views from desktop to mobile, desktop readers donate three times more often than mobile readers. Additionally, the average donation on mobile is half that of the average desktop donation. In the near-term this trend towards increased mobile and decreased desktop traffic could further impact the WMF's online fundraising efforts. A common misconception of the WMF revenue mechanism is that we can simply run banners longer to raise more money. In reality, the marginal gain from each additional day of fundraising drops rapidly after just the first week of fundraising, as the maximum pool of donors is exhausted.

*Response:* We are working to expand and improve mobile giving, so that a higher percentage of mobile readers will donate. Additionally, we are working to grow our capacity to effectively fundraise to more countries. Still, the increased revenue target may require us to run more intrusive banners than last year, although we would still try to minimize the impact on readers. We are fundraising more consistently throughout the year now, so we are able to adjust our tactics in response to current trends. This reduces the potential risk of a critical failure during a few crucial weeks of a short annual fundraiser. Overall, we are confident we can meet this target. In case reserves vary materially from plan, the Board Treasurer will notify the Chair of the Audit Committee and the Executive Director and propose corrective action.

**An unforeseen major expense or inability to raise revenues could use up the reserve and cripple the WMF financially.**

*Response:* The likelihood of this happening is extremely small. Our fundraising team has always met its goal and has the flexibility to shift its tactics if current strategies become ineffective. The WMF's costs are predictable and we have a track record of conservative planning. We have never in our major history faced a major unplanned expense. Our operating reserve is not expected to fall below six months of total expenses. In addition, we have made significant improvements to our insurance to protect against a variety of financial risks.

## Appendix: Ongoing Work Areas of the Wikimedia Foundation

This is a comprehensive overview of ongoing, long-term work that the WMF staff and contractors are carrying out in support of the Wikimedia projects. It complements the descriptions of larger, one-time endeavors and key programs that are highlighted in the WMF annual plan and elsewhere.

### Engineering

The mission of the Engineering department is to build, improve, and maintain the technical infrastructure of Wikimedia projects (software and hardware), by supporting and complementing volunteer efforts. Altogether, the MediaWiki software (with extensions) which is used on Wikimedia sites and supported by the WMF contains over 2.6 million lines of code, representing (in the estimate of one third party service) over 700 years of human effort.<sup>[1]</sup> In 2012 and 2013, the large majority of merged commits (i.e. code contributions entering the main version) came from the WMF staff and contractors, with over 20,000 commits in 2013.<sup>[2]</sup> They also participate heavily in the triaging, discussing, and resolving of bug reports and feature requests, posting 38007 comments on the Wikimedia Bugzilla platform in 2013.<sup>[3]</sup>

### Platform Engineering

The WMF's Platform Engineering team is responsible for the MediaWiki core (the central part of the software running the over 800<sup>[4]</sup> Wikimedia wikis), managing work from volunteer developers, and providing services that are used by multiple technology teams.

**Code review: We enable code contributions from community and staff while protecting the quality and security of MediaWiki as it supports our projects.**

Any change in the code base can have unintended consequences, e.g. breaking functionality, degrading performance, or introducing security holes. To ensure the quality and consistency of the MediaWiki core code and extensions used on Wikimedia wikis, a strict four-eyes principle is applied before merging new code, known as "code review." WMF staff perform code review for more than 1,500 commits per month,<sup>[5]</sup> from contributors both within and outside the WMF. A large part of these reviews are done by members of the platform team. Each code review involves the reviewers analyzing and understanding another programmer's work, often communicating with them to resolve open issues before taking the responsibility of approving the incorporation of this contribution into the main code base. The platform team also administers Gerrit, the code review platform itself.

**Security and privacy: We work to protect Wikimedia sites against criminal attacks, and to protect and enhance the privacy of our users.**

Besides reviewing single code commits for security issues, members of the platform team also perform larger security audits, handle security trainings, and (together with the Operations team) conduct forensic postmortem analysis of major security incidents and outages (11 in 2013). The team also responds to reported security issues and releases security updates to MediaWiki.

**Site performance and architecture: We make Wikimedia sites faster and keep them maintainable.**

This work comprises initiatives geared towards improving site responsiveness, decreasing resource consumption, and improving site maintainability. Towards this goal, the MediaWiki core team provides performance consulting services to other teams, audits their code, and makes architectural changes and improvements.

**Deployment: We push new code into production to support changes to the Wikimedia sites.**

The platform team organizes and oversees the weekly deployment cycle, where software changes and additions go live on Wikimedia servers.

**APIs: We enable external developers to create applications that interface with Wikimedia sites.**

The platform team is responsible for developing and documenting a clear set of APIs (interfaces that allow the functions of one part of the software to be used in other software) so that external developers can create applications that easily interface with MediaWiki.

**Release management: We make it easier for others to reuse our software.**

The platform team coordinates the organization of ongoing MediaWiki development into stable releases (about once or twice a year), interspersed by more frequent "-wmf" branches (36 in 2013<sup>[6]</sup>). The stable releases are prepared for easy reuse by third-party non-Wikimedia Foundation users with the help of an external contractor.

**Test infrastructure: We provide a platform for thorough routine checks of code changes.**

The team provides the infrastructure for testing MediaWiki changes and new features (used by the Quality Assurance team and others): Continuous integration (Jenkins), a testing platform to provide continuous quality control for MediaWiki, running new builds of MediaWiki through automated tests, and the Beta cluster (a functional, production-like environment in Wikimedia Labs suitable for final-stage testing of new features). The team also provides live test sites that run new code before it appears on the production sites (test.wikipedia.org and test2.wikipedia.org).

**Shell requests: We handle site configuration changes to support community requests.**

The platform team is also responsible for handling several hundred<sup>[7]</sup> shell bugs per year. These are Bugzilla requests that require direct (shell) access to the servers, including community requests for configuration changes on a particular wiki (e.g. the enabling of a specific functionality or MediaWiki extension) or the creation of new wikis.

**Search, authentication, etc.: We maintain and develop essential infrastructure parts for the entirety of our sites.**

The team maintains and improves the search function on our sites, authentication (user login) for the tens of millions of accounts, and other infrastructure elements.

**Multimedia: We provide a rich media experience and improve support for images, audio, and video files to facilitate our readers' access to more free content.**

The Multimedia team is responsible for features that provide a richer experience and support more media contributions on Wikipedia, Commons, and MediaWiki sites. This includes the handling of images, sound and video files, and the infrastructure to view, contribute, curate and use these files. The team believes that audio-visual media offer a unique opportunity to engage a wide range of users to participate productively in our collective work.

Here is a sense of what is being worked on: commons:Commons:Multimedia\_Features/Vision\_2016.

The team continues to develop features to improve the viewing experience for readers, enable seamless contributions by our community, develop feedback and curation tools, and help editors add media files to articles. The team plans to upgrade current infrastructure to improve the upload pipeline, implement structured data, and better integrate multimedia across all Wikimedia projects.

As of January 2014, Multimedia's two main projects are the Media Viewer, an immersive multimedia browser; and the UploadWizard, an incremental upgrade and code refactoring of our contribution pipeline.

**Quality Assurance: We carry out thorough routine checks of code changes to help ensure better rollouts for our community.**

Using Wikimedia's test infrastructure, the QA team performs both manual and automated testing, and reports issues and defects that are found. The team creates and maintains browser tests—automated testing of MediaWiki within various web browsers, surfacing issues that would affect users who access the sites with that particular browser.

As of early 2014, there are about 60 to 70 browser tests in use overall at any given time, providing test coverage for specific products (VisualEditor, Flow, MobileFrontend, UniversalLanguageSelector, UploadWizard) and for MediaWiki core itself, plus some special tests for CirrusSearch and Wikidata. Each individual test exercises multiple assertions about each feature being tested--some just a few, others containing dozens of test steps. Each test is run in at least two different browsers, some in as many as eight, and each built for each feature for each browser runs automatically at least twice a day.

The team's automated browser tests exercise the master branch of code on the Beta Labs test environment and exercise the potential release branch of the code on the test2wiki test environment. This enables the exposure of issues that could affect users at the times where such issues are most visible and can most easily be addressed, before they reach the production wikis. The team reports about ten issues per month in Bugzilla, on average, as a result of the automated browser tests, representing a wide range of user-facing issues.

## Engineering Community Team

**Reporting and documentation: We make MediaWiki accessible to new developers, and inform Wikimedia's volunteer community about software changes that affect their work.**

The Engineering Community Team publishes the monthly Wikimedia Engineering reports, giving a comprehensive overview of ongoing work in the WMF Engineering department, and supports the weekly "Tech News," informing Wikimedia users and communities about software changes that affect them (which is translated by volunteers into around a dozen languages every week<sup>[8]</sup>). The team provides communications support for all groups in the WMF engineering department, e.g. when they announce new features on the Wikimedia tech blog (which published over 100 posts in 2013<sup>[9]</sup>). It also works on developing a clear documentation of MediaWiki and its extensions on mediawiki.org, so that new staff, volunteer developers, and external users have a smooth ramp-up process to becoming MediaWiki developers.

**Outreach and development: We grow and nurture the MediaWiki developer community.**

We participate in and organize events such as MediaWiki hackathons, mentorship programs including Google Summer of Code (GSoc), the FOSS Outreach Program for Women (OPW), Facebook Open Academy, and the Google Code-in contest for teenage students, and help new volunteer developers find their way into MediaWiki development.

**Collaboration tools: We support MediaWiki developers in working together efficiently.**

The team facilitates collaboration on MediaWiki, e.g. by analyzing and designing workflows for our existing collaboration tools such as Gerrit (our platform for reviewing code changes), or exploring how we can choose the best possible tools. In particular, the team is responsible for Bug management, i.e. coordinating, triaging, and organizing the current bug reports on Bugzilla, Wikimedia's bug tracker.

**Upstream collaboration: We contribute back to free software projects whose work we are building on.**

We facilitate collaboration with free software projects that WMF uses in its own engineering work (such as OpenStack, Gerrit, HipHop, Cirrus search), e.g. by filing upstream bugs; error reports and feature requests that help them improve. We also work to facilitate reuse of our own software beyond MediaWiki releases (e.g. for Parsoid and VisualEditor).

## Technical Operations

The Operations team is responsible for the technical infrastructure of Wikimedia sites: this includes the data centers, servers, and network.

**Connectivity: We bring the world's fifth most visited web property online.**

The Operations team is tasked with connecting Wikimedia sites to the rest of the Internet. We work on planning and building Wikimedia's presence in new data centers, handling contracts with data center operators, negotiating preferred bandwidth rates, and peering contracts with connectivity providers and networking infrastructure vendors.

**Server infrastructure: We manage about 900 servers to support the Wikimedia sites.**

As of early 2014, Wikimedia sites have been running on about 900 servers.<sup>[10]</sup> The Operations team continuously works on procuring servers, racking them (physically installing them in the data center), installing their software, replacing broken infrastructure parts, and maintaining the Puppet configuration system that enables us to handle these servers efficiently. We also build and maintain a monitoring infrastructure to help us spot and resolve problems early. In the 2011-12 fiscal year, the Operations team achieved 99.98% up-time for our readers, with a fraction of the staff of any other top web property (up-time for editors was 99.88 %).<sup>[11]</sup>

**Organizational support: We provide operations assistance to other teams at WMF.**

Operations engineers work closely with nearly every other team at the WMF, assisting with the design and roll-out of things like fundraising technology, new encyclopedia features, and expansion to new reader platforms. In the RT system, where the Operations team tracks its day-to-day tasks (with participation by some volunteers), including external requests and server changes. 1,967 tickets were resolved during 2013.<sup>[12]</sup>

**Wikimedia Labs: We provide a space for experimentation and tool hosting to the community.**

Wikimedia Labs helps volunteers get involved in Wikimedia operations and software development. In December 2013, the tools project in Labs hosted 531 tools managed by 435 users, ranging from simple database queries to elaborate editing adjuncts using the OAuth infrastructure.<sup>[13]</sup>

**Data dumps: We make sure others can fully reuse the community's freely licensed work.**

As stated in the WMF's Guiding Principles: "We support the right of third parties to make and maintain licensing-compliant copies and forks of Wikimedia content and Wikimedia-developed code, regardless of motivation or purpose ... by making available copies of Wikimedia content in bulk, and avoiding critical dependencies on proprietary code or services for maintaining a largely functionally equivalent fork." The WMF publishes data dumps of Wikipedia and all Wikimedia projects on a regular basis. Dumps of the largest project are produced monthly and of other projects about twice a month. A set of dumps for all the projects is nearly two terabytes compressed.

**Product: We represent the needs of our users, readers, and contributors in building features that make the Wikimedia sites better.**

Our team of product managers oversees and coordinates the WMF's major software initiatives to modernize and enrich Wikimedia sites. As of early 2014, these initiatives include: Flow, VisualEditor, Growth, Language Engineering, Mobile, Multimedia, and specific projects in Platform. Product managers work with engineers and designers to build the vision and overall strategy for new products; establish timelines, goals, and performance metrics; and lead the launches of new products within the Wikimedia community. They work with:

- **Software engineers and user experience designers** on their respective product teams to design and build products;
- **Data analysts** to help measure the use and effectiveness of the features developed;
- **Other staff throughout the WMF, including the Community Advocacy Team** to facilitate roll-out of new products in many diverse language communities, and with the **Communications Team** to develop blog posts and other messaging; and
- **A wide array of experienced community members**, engaging in discussions with the volunteer community to surface issues, get feedback, and inform product development



## **Features Engineering: We develop new features for our users.**

The Features Engineering team is responsible for developing new features for MediaWiki.

### **Core Features: We handle major new editor engagement products.**

The Core Features team handles the software development of major products that focus on acquiring, engaging, and retaining contributors, such as Flow (discussion and collaboration software) and Echo (Notifications).

### **Growth: We build software that helps grow the community of active editors.**

The purpose of the Growth team (formerly called "Editor Engagement Experiments" team) is to find ways to acquire, activate, and retain new Wikipedia editors. It focuses on implementing software improvements particularly for new or inexperienced contributors who have just joined Wikipedia. This includes an onboarding process for new Wikipedians, page drafts, interactive guided tours, account creation user experience improvements, post-edit confirmation messages, and editor campaigns support. These software projects focus on solving problems experienced by new users in particular, making sure that volunteer contributors have a good first-time experience on Wikimedia projects, and thus will want to keep contributing over time.

### **Upkeep: Making sure the software we write lives on and stays useful for our community.**

Even while we're pushing forward with new things, everyone on the features team is sharing in the responsibility to make sure that all the existing features keep working. One example among many others is moving PDF rendering servers (that allow readers to do things like collecting Wikipedia articles into PDF "books" for offline reading) from the old data center in Tampa to the new one in Virginia, and upgrading the rendering software.

### **Thinking forward: We proactively work on improvements beyond our job description.**

We all have pet projects that we know we want to get done. When the circumstances allow it, we'll work on these for the betterment of the site and our lives. As of early 2014, such projects include a new storage system (Rashomon, for improved performance and easier internal handling of all versions of a wiki page), a new HTML/RDF templating language, offline content rendering (mathoid), and online content playback of the free video formats used on Wikimedia sites, even on devices that have so far not supported them (ojv.js).

## **Mobile**

The Wikimedia Mobile Engineering department is responsible for enabling, growing, and evolving the use of mobile technologies on Wikimedia projects. We do this through a diverse set of teams and projects focusing on mobile web, iOS and Android apps, and Wikipedia Zero.

### **Mobile Web: We empower readers and editors to access and develop our content on any Internet enabled device.**

The mobile web team's mission is to create high-quality, intuitive features that empower a global community of readers and editors to access and develop the sum of all human knowledge on any Internet enabled device. The team focuses on:

- Building a stable **mobile technical infrastructure** for use by all engineering teams at the WMF using MobileFrontend. MobileFrontend is the piece of MediaWiki that controls reflow of HTML & CSS to make our web pages mobile appropriate. It has been developed internally and is slowly becoming part of core MediaWiki.
- Building out the **mobile web experience** for both handsets and tablets. The team has worked on bringing the reading and (since 2013) editing experience to handsets and is prepping for extending these to tablets in 2014.
- Creating article editing, image uploading, and various other **contribution flows for mobile users**. Through projects like VisualEditor, Flow, mobile watchlists, Nearby, Notifications, etc., the team is building new functionality and gaining parity with the desktop version, where appropriate.
- Evolving our **mobile API** for third party consumers. Both the official Wikipedia App and numerous other third party apps consume this lightweight API.

- **Retooling legacy editing and contributory workflows** to be simpler and easier for new users to understand. The team actively rethinks such areas to see how users can add additional content without having to worry about complicated legacy workflows and device limitations (example: Lead Photo Upload).
- Evolving Wikipedia **design to be responsive and mobile-first**. Through features like Nearby, the mobile web team is scaling their designs not just for mobile but also for larger screens.

**Mobile Apps: We build custom mobile apps that enable our power users to both read and contribute content.**

The mobile app team focuses on building custom Android and iOS applications. The team's work involves:

- Building and maintaining native **iOS and Android applications** for Wikipedia and Commons, making sure they work on a wide variety of devices.
- The evolution of **internal APIs** to support decoupled applications. For example, in 2013-14 the team added a new API to allow for account creation.
- Working with designers and data analysts on the most thoroughly **redesigned version of the collaborative user experience** on Wikimedia sites. This includes research (e.g. user interviews or quantitative analysis of how app features are used), design mockups and beta tests of new features, and processing and implementing community feedback.
- Close partnership with the Mobile Web team in the **evolution of Mobile within the WMF**, setting the direction for the future. The team strives to rethink how people interact with content through features like a revised table of contents, image upload, and text editing.

**Partner Engineering: We work with our telecom partners to reach the next billion users.**

The Partner Engineering team works closely with the Mobile Partnerships team to encourage mobile network operators in many countries to make Wikipedia available free of data charges (see also the next section). The team focuses on:

- Evolution of the **technical Wikipedia Zero product**. The team manages the software that allows our partners to maintain IP ranges (addresses used by the partner's customers that allow our site to recognize them as Wikipedia Zero users), create custom messaging for their Wikipedia Zero users, and enable/disable the use of images to keep Wikipedia pages small.
- Increasing the number of partners signed onto the program through **automation and self-service portals**.
- Exploratory work with delivery of Wikipedia content on mobile devices without Internet support, through **Wikipedia on SMS and USSD**.
- Support for **legacy interfaces** like J2ME for low-cost feature phones.
- Close partnership with the Mobile Web and Ops teams to make the site **perform** optimally.
- Coordination with **telecom partners** for technical implementations.

**Wikipedia Zero: We develop a program that provides cellphone users in the Global South with free access to Wikipedia.**

Since launching the **Wikipedia Zero** program in early 2012, the team has signed up six global mobile operator partners (Orange, Telenor, Saudi Telecom, Vimpelcom, Axiata, and Airtel) plus three independent operators that give nearly 400 million of their subscribers throughout the Global South free access to knowledge on mobile devices. As of December 2013, services have been launched in 22 countries through 24 operators. Over the last year, readership through Wikipedia Zero has shown a steep increase. Page views through Wikipedia Zero totaled 2.7 million in November 2012 and increased to more than 41.3 million in December 2013 -- and continue to grow rapidly with new operator launches every month.

**User Experience Design: We are responsible for the look and feel of Wikimedia projects.**

The WMF User Experience Design group is responsible for the look and feel of our projects, from a functional level to the final, pixel-level, released design. The UX group works closely with existing Wikimedians as well as new users to socialize our designs and plans, and works with the Product Management group to establish product roadmaps. Since forming in 2013, the group supported design for 16 major projects as of early 2014, and many smaller features. Its work includes:

- Triaging, creating, and collaborating with community members on Bugzilla design bugs;
- Interacting with community developers through the public design mailing list;
- Creating new channels for user feedback on new and existing projects;
- Weekly team design critiques of work-in-progress projects (covering about five to ten projects per month as of early 2014);
- Usability research with new and existing users;
- Establishing guidelines for the use of typography, iconography, interaction patterns, component libraries, and voice and tone for our sites' interface;
- Exploring long-term feature ideas through experimentation, research, and the Beta Features framework;
- Interacting with community members to guide the change management process of the interface to the WMF projects;
- Informing product roadmaps through community engagement; and
- Guiding and maintaining interaction and visual consistency across the WMF projects.

### **Analytics: We inform decision making across the WMF and the community.**

The Analytics team empowers and supports data informed decision making across the WMF and the community. The team is composed of two groups: Development, and Research and Data.

### **Development: We build the analytics infrastructure and tools to better understand the movement's challenges.**

The Development team builds the infrastructure, tools and datasets that enable the WMF and the community to easily access, process and act on our data, in a way that is consistent with our values. It maintains the dozens of servers used to count page views and edits of the world's fifth most popular website. Projects include the following:

- Wikistats - which provides metrics and data visualizations for the 800+ projects across the Foundation;
- Wikimetrics - which provides participation metrics for program leaders such as Wikimedia chapters;
- Report Card - which sets out an easy-to-understand summary of the WMF's key metrics;
- Wikipedia Zero dashboards - which provides usage information for our partnerships with mobile carriers that deliver Wikipedia free of data charges in developing countries;
- Limn - which is a general purpose dashboarding tool used across the WMF; and
- Logging Infrastructure - which is software to collect and aggregate readership and participation data.

### **Research and Data: We answer research questions relevant to the Wikimedia movement.**

The Research and Data team has three main responsibilities:

- to support the organization in making research-informed decisions;
- to expand our understanding of the editor community and projects; and
- to help teams evaluate the impact of new programs and features designed by the WMF.

We use a variety of methods (including quantitative and qualitative strategies, exploratory analyses, controlled experimentation, and statistical modeling) to answer research questions relevant to the Wikimedia movement.

### **Language Engineering: We make Wikipedia and its sister projects the world's most multilingual collaborative website.**

The Language Engineering team at the WMF provides language software support for Wikipedia and other sister wikis. Language software comprises internationalization features as well as localization software for Wikipedia websites in hundreds of languages.

In 2013, the MediaWiki extensions that we maintain as a team saw 283 bugs filed, 609 closed, and 432 fixed. In the same year, the number of non-bots git commits (for the UniversalLanguageSelector, Translate, TranslationNotification, TwnMainpage, Babel, LocalisationUpdate, and cldr extensions) was 1,774, in addition to 525 commits on GitHub (for four internationalization libraries that we maintain for the widely used jQuery software, which are available for third-party jQuery reusers).

The day-to-day responsibilities of the WMF's Language Engineering team are focused on the following areas:

**Development of internationalization software features: We work to enable multilingual content contribution on all Wikimedia websites.**

The team has developed and maintains internationalization software for all Wikimedia websites that delivers **input tools** which enable users to contribute in their own language, even when their computer's keyboard does not provide full support, and allows using **webfonts** to display content in languages for which there is no font installed on the user's computer. As of early 2014, there were 329 input methods available for 63 languages, and 66 webfonts for 131 languages.

Our software enables users to set their language preferences for their user interface (including support for language-specific constructs regarding, for example, plurals, gender, grammar), and for the selection of webfonts and input methods to read and write in their preferred language. These preferences are available as part of the Universal Language Selector (ULS) extension for MediaWiki.

**Development of localization software tools: We make it possible to provide Wikimedia sites to all users in their own language.**

We provide localization software support that enables the community to translate all user interfaces and system messages for the more than 900 Wikimedia websites in 287 languages. This includes enhancements to our translation software (the Translate extension for MediaWiki) and to allied projects such as translatewiki.net. Besides helping Wikimedia project communities to be able to use the sites in their own language, the Translate extension is also increasingly used to facilitate communication across these language communities in our movement. As of early 2014, on Meta-Wiki alone over 900 pages have been made available for translation, thanks to this software feature. Examples include resolutions and election pages for the WMF Board of Trustees, documentation pages, posts for the Wikimedia blog, summaries of the WMF monthly reports, and the weekly Tech newsletter.

**Maintain internationalization and localization support: We ensure that language support is an integral part of MediaWiki development.**

The team collaborates with other WMF engineering teams as well as many community members on full internationalization support for new and existing MediaWiki components, and on supporting constantly extending localization by integrating volunteer translations of interface messages.

**Joining forces with others: We collaborate and innovate with other open source organizations to improve language software, fonts, and input tools.**

We collaborate closely with other top internationalization software contributor organizations to improve open source language tools, fonts, and input tools. Organizations that actively participate with us throughout the year and at our Language Summits and hackathons include Red Hat, Mozilla, Fedora, Debian, KDE, Google, Adobe, Microsoft Research and others. See e.g. here.

**.Internationalization standards: We maintain compliance with and contribute to technical Web standards for language software.**

We work to ensure MediaWiki and our sites are compliant with web internationalization standards including Unicode, CLDR, ECMA, and W3C. We review proposed standards and participate in feedback processes for language standards for the Web.

## **Grantmaking**

The Grantmaking team (established in its current form in 2013-14) has a three-fold strategy: to build effective designs and processes for our different grants programs; to create a learning and evaluation framework for our movement, including a movement-wide platform for mentoring and sharing of best practices; and to deepen the diversity in our movement through supporting strategies in the Global South and challenging the gender gap. This is intended to establish a strong basis for a successful grantmaking process at the WMF, ensuring that funds are disseminated in line with movement values and principles of participation and transparency, while seeking a much more definitive understanding of good outcomes and impact of these funds.

## **Grants: We support the growth of the global Wikimedia movement through grants and other resources.**

As presented in the fiscal year 2013-14 Annual Plan, the WMF funds around 150 unique projects a year, supporting organizations and individuals in over 50 countries. We do this through four primary grants programs:

- **Individual Engagement Grants** (\$200,000 per the 2013-14 annual plan, advised by the IEG Committee);
- **Travel & Participation Support grants** (\$50,000; advised by the TPS Committee);
- **Project & Event Grants** (\$700,000; advised by the Grants Advisory Committee); and
- **Annual Plan Grants** (\$6M; recommended to the WMF Board by the Funds Dissemination Committee).

In addition, we oversee:

- **Wikimania Scholarships** once per year (\$150,000, recommended by the Wikimania Scholarships Committee); and
- **Partnership Grants**, for strategic partnerships with non-Wikimedia organizations primarily in the Global South (approximately \$618,000 in 2013-14 with two organizations in Brazil and India, see below).

Overall, per the 2013-14 Annual Plan we are responsible for distributing \$8 million. We give grants to individuals (6% in 2012-13), to movement organizations (89%), and to other allied groups (5%).

We solicit grant proposals, facilitate the decision-making processes to decide the grants, carry out due diligence on potential grantees, support the implementation of grants through mentoring/coaching/advice when needed, and ensure ongoing compliance with grant agreements (e.g. reporting).

This whole process is carried out through an **open, transparent grants system** (all applications are posted on meta.wikimedia.org) and through the counsel and recommendations of **community-comprised committees**. As of December 2013, over 1,000 unique Meta-wiki users contributed to grants-related processes (by submitting requests, commenting, etc.): 1,093 unique users contributed two edits or more, with 1,719 making one edit or more. 67 community members were involved in these committees (nine, in the FDC, 28 on the GAC, 17 on the IEG Committee, three on the TPS committee, and nine on the Wikimania Scholarship committee), reportedly making the WMF the largest peer-review funder of its kind in the world. These committees are intentionally designed to be geographically and gender diverse, and include community members involved in different Wikimedia projects.

We are carrying out an ongoing **evaluation of our grantmaking processes**, including tracking metrics via internal data and surveys, and surveying innovations by other global grantmakers (such as new ways of reporting, and tools for tracking grants).

## **Learning and Evaluation: We facilitate evaluation and knowledge-sharing across the Wikimedia movement.**

The Learning & Evaluation team for Grantmaking is focused on answering two questions:

- How can movement programs and movement partners be best poised to achieve impact?
- What support can we provide the movement in order to achieve impact?

We are committed to enabling data-empowered, outcomes-driven work by program leaders across the movement, Wikimedia organizations, the WMF grantees, and our colleagues managing grants programs. We primarily support the increased effectiveness of programs and organizations across the movement through facilitating the culture and capacity for self-assessment and shared learning. In early 2014, the teams for Program Evaluation and Design (which had focused on programmatic effectiveness), and Grantmaking Learning and Evaluation (which had focused on organizational effectiveness and grants evaluation), came together in a restructuring of the Grantmaking department. We are currently exploring the most strategic and effective way of creating a combined Learning and Evaluation framework and structure that can support our worldwide community and our grants programs.

In 2013, we started the Wikimedia movement's first initiative to systematically evaluate the effectiveness and impact of different programmatic activities across countries. Our vision is to empower a global community of program leaders to effectively run programs that have impact at scale. Detailed reports provide individual volunteers, staff members, and funders with information about which programs deliver against their goals and which have room for improvement. Based on the results of this and future analysis, the team:

- provides **skills development** for people who develop and execute programs, including capacity building around evaluation;
- identifies and removes **roadblocks** that keep program leaders from achieving the maximum amount of impact;
- develops **tools** that improve people's ability to plan, execute, and evaluate programs;
- **builds community** among program leaders so that people can share learnings with each other; and
- works hand-in-hand with program leaders to create **toolkits and templates** that help others to replicate successes.

We also work on designing and tracking good measures for organizational trajectories of growth and effectiveness with our movement partners, based on research within the Wikimedia movement and external research. We work with other teams within the WMF -- most closely with the Analytics team -- to design and build the most useful tools for our grantees to be able to evaluate and understand the impact of their work. Such tools include Wikimetrics, which as of December 2013 had 202 unique users; dashboards; survey software; and community mapping. We facilitate learning conversations as a community (e.g., the Evaluation portal -- 112 unique contributors). We experiment with tools to facilitate reflection (e.g., Learning Patterns -- 28 patterns created in the first two months) and innovation (e.g., IdeaLab -- 113 unique contributors, 48 ideas). We also surface movement-wide trends as they emerge through the different grants streams. Upon request, we provide input into community conversations around organizational design and evaluation (e.g., IberoConf, Diversity Conference, Governance session).

For more information on the work being done, see the Evaluation Portal, Program Evaluation and Design, and Learning & Evaluation pages.

### **Diversity: We seek strategic opportunities to deepen the diversity of the Wikimedia movement.**

The Grantmaking team is committed to supporting growing diversity in the movement. We are taking the lead at the WMF and in the broader movement on an extensive Global South strategy. We are proactively working with high potential Wikimedia communities in the Global South, through intentional collaboration and partnership building. We seek out movement partners in our top priority regions, working closely with these partners (as of early 2014, Centre for Internet and Society in India and Ação Educativa in Brazil).

We are also committed to facilitating a broader Gender Gap strategy, within the WMF and beyond, to work towards a free knowledge project with more equal gender representation. While the WMF itself carries out only a few initiatives directly, the WMF grantmaking team proactively funds projects working on redressing the gender gap, and has also been facilitating some initial Gender Gap strategy conversations in the movement (for example, staff conversations with experts, or supporting the 2013 Diversity Conference).

We are proactively measuring our investments in these areas by looking at:

- the geographic distribution of our total grants;
- the proportion of funds that goes to redressing the gender gap; and
- the number of participants in the Global South, as a proportion of our total editing base.

Most significantly, in early 2014, the **Wikipedia Education Program** joined the Grantmaking team. This is one of the most successful initiatives to improve Wikipedia's article quality by teaching and encouraging new contributors to add content to the encyclopedia, and it is a critical entry-point to building diversity in the movement. In the U.S. and Canada alone, students have added the equivalent of more than 12,500 printed pages to the English Wikipedia in 2013. In the Arab World, 87% of the participants in the Education Program are women. As of December 2013, more than 20 countries have established education programs, and efforts are underway to create programs in an additional 40 countries.

The WMF's Wikipedia Education Program team has helped to launch, support, or develop these volunteer activities in numerous ways: planning and research including a needs analysis and the identification of global trends; developing concepts and workflows; conducting outreach efforts; connecting Wikimedians and academics by facilitating the communication between these two communities; providing continuity; and working directly with program leaders. The team has also created support resources like brochures, online trainings, and a MediaWiki extension that can be localized and translated to help program leaders successfully execute education programs in countries around the world.

## Fundraising

The WMF Fundraising team cultivates the resources that propel our movement. Every year, we engage over 2 million people from around the world to support Wikipedia and its sister projects. In FY 2012-13, we raised a total of \$48 million dollars for the movement, exceeding our annual fundraising goal.

### **Online Fundraising: We orchestrate global online fundraising campaigns to support our mission.**

The online fundraising team runs banner campaigns on the WMF sites globally. We search for and craft the most compelling banner messages. This involves researching the facts most suitable to illustrate the uniqueness of our organization and movement, interviewing numerous voices from our community, and designing banners and donation pages. To that end, we use extensive A/B testing,<sup>[14]</sup> running and analyzing hundreds of tests each year. We support the work of two chapters who fundraise on the WMF sites, sometimes designing banners for them, and providing expert advice. In addition, we carry out lots of technical work on CentralNotice, the MediaWiki extension for displaying those banners.

In the first half of the fiscal year, we focus our efforts on English speaking countries. In the second half of the fiscal year, we run our multilingual campaigns. This involves both translating messages, and tailoring them to make them relevant and effective within different cultural contexts. Our global team works in concert with volunteers to complete this work. In FY 2012-13, we organized more than 1,000 volunteers to assist with translating fundraising messages into more than 100 languages. Lastly, we resolicit past online donors through email campaigns.

### **Major Gifts and Foundations: We raise funds from large donors and grantmaking organizations to support our mission.**

We are responsible for raising funds from large donors and grantmaking foundations. In FY 2012-13, our team raised \$8.5 million to support the global Wikipedia movement. We make presentations to large donors and write grant applications and reports. We describe the story of the movement and the WMF's own work in a compelling, accessible way and detail the work that was done with the funds entrusted to us. Additionally, the Foundations and Major Gifts Team organizes fundraising events and manages our matching gifts program. We also organize our "offline" donors, who give via check, sending direct resolicitation mail to these donors once per year. We also manage in-kind donations, donations of stock, and legacy gifts, when donors include the WMF in their wills.

### **Fundraising Operations: We provide global payment options and customer service to our donors and manage the associated data.**

In FY 2012-13, we enabled more than 2 million donations in 82 currencies using 17 payment methods. This team negotiates the best rates with payment processing providers throughout the world. We also work on fraud prevention and issue refunds when fraud occurs. We provide a contact point for questions, compliments, and complaints by donors. In December 2013, for example, we responded to over 15,000 emails from our donors. This team also maintains our fundraising database and insures that our donors receive timely acknowledgement and thanks. We also research and advise on potential new revenue streams, including the development of a possible endowment strategy.

### **Merchandise shop: We enable our readers and editors to show their support for the movement in real life.**

The Wikimedia shop is the online store that offers affordable, high quality merchandise to project volunteers and the general public, to reward contributors and spread the Wikimedia and project brands around the world. Our team manages the online store, including marketing, product development, order fulfillment, and shipping.

## Legal and Community Advocacy

### Legal

The legal department of the WMF provides counsel for our global Wikimedia websites and projects, and provides legal expertise in community support (which may include assistance in the protection and defense of the community and its values), copyright law, political advocacy, freedom of speech, privacy law, policy development, trademark and brand protection, open source and free licensing, contract law,

and governance counsel for the Foundation's Board of Trustees. The Legal Department's mandate:

*We aggressively steward globally the values of our mission and our community of writers, editors, photographers, and other contributors by building and overseeing good governance where appropriate; by protecting and defending those key values when challenged; and by facilitating initiatives designed to support and grow our community and their various projects, including Wikipedia and its sister Wikimedia websites.*

**Protection, defense, and litigation: We fight aggressively to protect our movement values.**

The legal team pushes back successfully against unreasonable demands by governments and private parties (roughly 150 such demands in FY 2012-13) to alter or censor truthful and legal content, sometimes with public consequences to those who choose not to play fair.<sup>[15]</sup> In all 150 cases handled in FY 2012-2013, we succeeded in pushing back against informal demands to remove or alter Wikimedia content.

We also successfully defend against illegitimate copyright takedown demands -- most of which never evolve into formal DMCA takedown notices. In FY 2012-13, the WMF was required to remove content due to receipt of 15 legally-valid DMCA takedown notices. However, in the same FY, the legal team successfully fought against compliance in 16 cases where we did not believe that the DMCA takedown notice was legally valid.<sup>[16]</sup>

The legal team works to resist the unreasonable scope of government subpoenas requesting information, and provides guidance and counsel for targeted users on how to quash subpoenas or push back on unreasonable government demands for information. In FY 2012-13, the legal team successfully fought back against all of the 15 informal requests for user data from private parties and six government requests for user data that it received.<sup>[16]</sup>

At times, when others transgress our values of free speech and license, we need to resort to litigation, where we typically have five to ten significant cases pending worldwide, and are successful in the vast majority of them.<sup>[17]</sup> The legal team oversees all global litigation for the WMF, with a global network of outside counsel who are considered to be leading in their field, and in appropriate cases we help fund legal defense for our community members when they are threatened.<sup>[18][19]</sup>

**Community support: We provide daily support to our community and its work.**

Every day, the legal team reviews referrals from community members. In 2013, we received about 85 questions through the Open-source Ticket Request System (OTRS), the system that our volunteers use to handle most emails from our readers and the public.

We are often contacted by organizations in our movement, such as chapters or community governance groups, to explain best practices and provide other support as appropriate.

We host a forum on Meta-wiki, called Wikilegal, where one can find preliminary background research on numerous and often sophisticated legal topics, and where the community may engage in discussions on such issues.

**Political advocacy: We ensure our views are known to politicians who threaten our values.**

As a legal department, we oversee the WMF's engagement on policy issues. The department helped respond cross-functionally to the community request for a 2012 blackout to protest the poorly-conceived Stop Online Piracy Act (SOPA) and PROTECT IP Act (PIPA).

We participate in the advocacy advisors list, following or providing input on governmental initiatives worldwide, or initiating discussions about them. We oversee the implementation of the Policy and Political Association Guideline on a variety of political or policy initiatives, such as our responses to the 2013 surveillance disclosures. We are also members of the Digital Due Process Coalition. Our team members have experience doing policy work at the EFF and various advocacy groups.

We ensure that our activities are consistent with laws limiting the role of U.S. nonprofit companies in politics and policy.

**Privacy: We help build privacy protocols to protect the rights of our community.**

Privacy is a core value for our movement. We advise daily on privacy issues and help identify and maintain protocols to assist in the proper governance of user and donor data. In 2014, we plan to launch our new privacy policy, developed together with the technology department and in consultation with the community, alongside other related policies,<sup>[20]</sup> that minimize the collection of data and ensure



transparency of its use.

One of our team members researches digital privacy issues as a Junior Affiliate Scholar at the Stanford Center for Internet & Society. She frequently publishes and presents on privacy and Internet law issues. Her privacy work has been selected as one of the top policy papers in 2013 to be distributed to members of the U.S. Congress, the Federal Trade Commission, and the Federal Communications Commission.

**Policies: We steward policies to support good practices with active and unprecedented community collaboration.**

In 2011, we spearheaded a three and a half month collaboration with the community on the drafting and approval of our terms of use -- generating a discussion with over 4,500 lines of text that resolved more than 120 issues.<sup>[21]</sup> We have since carried out other types of collaboration with respect to many other policies and guidelines.<sup>[22]</sup> As mentioned above, in 2013-14 we sought and received strong and extended community involvement in the drafting of a new privacy policy and related documents, with discussions that lasted almost eight months and reached approximately 195,000 words.<sup>[23][24]</sup> Also in 2013-14, we conducted a seven-month long consultation with our community to develop a new trademark policy, which received almost 550 comments and resulted in over 340 changes to the policy draft. The resulting new policy, approved by the Board in February 2014, is unconventional in how it provides expansive use of the Wikimedia marks while maintaining legal protection.<sup>[25][26]</sup>

**Trademarks: We build and defend our trademark portfolio to promote and protect the brand that our community built.**

Our trademarks identify the Wikimedia projects and the work of our community. Protecting these trademarks is a core reason for the creation of the WMF. We have built and now maintain a global trademark portfolio for our large repertoire of marks and continue to register new brands, such as Wikidata and Wikivoyage.

With inquiries ranging from movie studios to community meetups we were averaging (as of 2012) about 200+ requests to use our trademark each year, many of which require written legal trademark licenses.<sup>[27]</sup> We expect that number to decrease with our new, more open trademark policy introduced in 2014, which allows greater community use of our marks when supporting the Wikimedia mission.

We aggressively retrieve our domain names from cybersquatters through proactive measures, including lawsuits, arbitration, and other mechanisms.<sup>[28]</sup> With the support of MarkMonitor, we survey the web for infringing domain names and misuse of Wikimedia marks while writing cease-and-desist letters, resulting in the takedown of infringing domains and uses.

**Open source and free licences: We advocate for the open source and free license community.**

When appropriate, we work closely with Creative Commons on legal issues involving free licenses that arise in our community. We publish in support of open source and free licensing, and retain close ties with like-minded organizations.<sup>[29]</sup> The team is writing about solutions to reconcile the tension between trademark law and the values of collaborative communities -- work that they presented at the 2014 Works-In-Progress Intellectual Property conference.

Members of the legal team serve in leadership roles outside of the WMF related to the promotion of open source software and licenses. As of 2014, our Deputy General Counsel serves as a director to the Open Source Initiative, chairs that group's license review committee, and also serves on the Open Definition's Advisory Council.

**Fundraising: We support our global fundraising strategy to ensure revenue for the Wikimedia mission.**

We provide daily advice on our fundraising activities, such as approval of banner and fundraising text. We research and ensure compliance with 30+ global fundraising laws as well as maintain our charity registrations in 40+ states and elsewhere. We also drafted and negotiated revised fundraising agreements with chapter organizations and have overseen those agreements since their signing.

**Contracts: We negotiate and approve hundreds of contracts every year that promote our mission.**

We negotiated, reviewed, and approved more than 260 contracts per year as of 2013 (while seeing a significant increase in numbers year over year).

Received almost daily from all departments, these agreements vary vastly in complexity. They can relate, for example, to technology and data centers, events, maintenance, global mobile projects, fundraising, leases, service needs, international consultants, and surveys.

Our work is often seen internationally through Wikipedia Zero partnerships, where we play a critical role in finalizing complex agreements that allow for distribution of Wikipedia content to parts of the world that otherwise would not have access.

**Daily legal guidance: We provide ongoing advice to ensure the legality of our operations.**

The legal department is called upon daily to provide legal advice worldwide on the many projects and issues tackled by the WMF, including, for example, editor retention initiatives, creation of new sites like Wikidata and Wikivoyage, intellectual property questions (moral rights, copyright, personality rights, DMCA takedown notices), technology law issues, and internal policies. With three members of our legal team having programming experience themselves, we also regularly provide advice on technical issues, including open source licensing, user interface design questions, mobile device regulations, patents, and on the wide variety of other ways in which software code can interact with legal code.

**Governance: We build governance models to ensure community and donor trust.**

Our movement includes a network of organizations (including the WMF, chapters, thematic organizations, and user groups) that requires the building of solid governance models. Movement governance is about valuing those who support our mission. Without good governance, donor dollars are wasted, misspent, or simply stolen, and the community's work is squandered. The legal department is vigilant, along with these other organizations, in ensuring that our governance values and standards are upheld.<sup>[30]</sup>

We engage with the community to draft, review, and set best governance standards, such as our Guidelines on dealing with potential conflicts of interest. We oversee the conflict of interest processes and protocols for senior WMF staff and the Board. When circumstances require it, we work globally with ethics consultants and manage ethics inquiries.

**WMF Board of Trustees: We support our Board in their strategic decision-making and leadership.**

Our General Counsel serves as the Secretary of the WMF Board of Trustees, supporting the Board's operations.

We ensure that Board processes are consistent with non-profit corporate law. In 2013, we helped the Board draft a new handbook, totaling about 50 pages, which the Board published as a guide for its operations and as a publicly-accessible best practice guide for the community.<sup>[31]</sup>

We help draft resolutions to ensure proper governance.<sup>[32]</sup> We attend Board meetings, provide training on fiduciary duties (i.e. responsibilities of trustees), help prepare agendas, and draft minutes for the Board's approval. We also help propose updates to the bylaws to reflect legal requirements and best practices.

**Movement roles: We help support movement roles and its mission.**

We draft and negotiate agreements for recognized chapters, thematic organizations, and user groups. We advise on movement organization issues, such as the use of Wikimedia trademarks. We assist in reviewing and updating the charters of the Affiliations Committee and the Funds Dissemination Committee, and often advise on procedural issues. We have developed best-in-class agreements to manage the various types of grants falling under the Funds Dissemination Committee (Annual Plan Grants) and the WMF Project & Event Grants Program.

**Our home team: We support our WMF employees and contractors to help create a great workplace.**

In close coordination with our Human Resources department, we assist with employee and contractor agreements. For example, we review employee guidelines, write or review work policies, and help protect our people against outside harassment.

## **Community Advocacy**

Community Advocacy serves the WMF and our community of readers, writers, editors, photographers, and other contributors by providing support on the WMF initiatives with a focus on community consultations, governance, and training. We do this by ensuring proper communication with multilingual communities and Wikimedian leaders, building feedback mechanisms so we can hear from members of the community on these projects, and ensuring constructive and supportive dialogues with our various communities in different geographies.

**Change management: We support communities in the rollout of major site changes.**

We support the rollouts of major WMF initiatives -- such as software changes or site policy updates - by ensuring proper communication with multilingual communities and leading Wikimedians, building feedback mechanisms to hear the community voice on these projects, and ensuring constructive and supportive dialogues with our various communities in different geographies, speaking different languages. In 2013, several major projects were supported, among them the VisualEditor beta launch, an overhaul of our OTRS email system, a renewal of our privacy policy (with nearly 174,000 words of community discussion), and an update of our trademark policy (52,036 words).

### **Direct community support: We step in to facilitate interactions among volunteers, the WMF and the public.**

The Community Advocacy team supports volunteers in our community in the day-to-day governance of the Wikimedia sites through approximately 15 workflows:

- **OTRS support.** Community Advocacy (CA) provides significant support to the OTRS volunteer response team, which handles more than 48,000 substantive emails from the public yearly (as per 2013). The team takes responsibility for approximately 10 inquiries or escalations a week (which can take between 20 minutes and 20 hours to resolve). Examples include requests to respond to users unsatisfied with past responses, or requests to address genuine problems that OTRS is not equipped to handle. They also provide an entry point for OTRS volunteers who wish to access the WMF staff in the performance of their tasks.
- **Child pornography reports.** When reported to the WMF, and pursuant to our internal written procedures, the CA team manages child pornography reports and follows up with law enforcement. With close cooperation from the Legal team, the CA team works within a defined set of steps to determine whether images should be reported to the U.S. National Center for Missing/Exploited Children (as is often required by law), and uses our internally built tool to manage that report. In 2013, CA determined that 14 alerts required reporting to the National Center for Missing/Exploited Children.
- **Emergency@Wikimedia.** CA provides support to the community in the surprisingly frequent event that a user threatens online to harm themselves or someone else. Between July 2013 and March 2014, the team evaluated and reported 19 incidents to law enforcement as potentially viable. CA supports an infrastructure for handling international threats in multiple languages.
- **DMCA takedown and notification requirements.** For the last three years, the team has worked in close cooperation with the Legal team to process and remove content that was added to our sites in violation of the Digital Millennium Copyright Act. Despite millions of contributions to our projects, we have been forced to comply with takedown orders only about 15 times a year. When Legal is not able to credibly fight a takedown notice, CA steps in to execute that takedown quickly, while protecting the rights of those involved. They notify the contributor and the community, delete the file, file a report with the Chilling Effects database, and serve as a contact for the community. In FY13-14, the team developed a specialized tool, cutting the processing time for each takedown by about 75%.
- **Supporting Jimmy.** The CA team responds to 35+ requests from Jimmy Wales a year (as of early 2014) to put people in contact with appropriate WMF staff members, to respond to particular community members, and to generally provide requested advice and feedback.
- **Supporting the Executive Director.** When the ED is contacted by a member of the public with a concern about an article, an editor, or a policy, she often forwards that correspondence to CA for action. CA either responds to it, or has a volunteer do so. CA will track and follow-up as appropriate. As of early 2014, CA received about 35+ such correspondences a year.
- **Liaison to the Election Committee.** The CA team serves as the WMF contact and support to the Election Committee, which manages the bi-annual elections to the WMF's Board of Trustees and Funds Dissemination Committee. CA ensures that the systems are in place (both socially and technically) to support the committee in this work, and takes a leading role in crafting the election and ensuring turnout.
- **Liaison to the arbitration committees.** CA serves as the liaison to the arbitration committees on the Wikimedia projects. These are community-elected committees that frequently serve as the final appeal on user conduct or project content. CA's most frequent interactions are with the ArbCom for the English Wikipedia, which probably averages two hours per week (and sometimes much more).
- **Liaison to the stewards, checkusers, oversighters, and other global functionaries.** Various community groups serve different roles in project governance; CA's job is to liaise with them and act as the staff voice to ensure they are properly supported. Such assistance,

for example, may consist of advocacy for a new technical tool or staff resources to address a legal challenge. In this way, the team serves to support the (i) stewards -- i.e. cross-wiki, globally elected trusted members of the volunteer community who oversee the wikis; (ii) the checkusers -- i.e. trusted users with access to a specialized tool for identifying IP addresses behind a username to help combat abuse; (iii) oversighters -- i.e. users with the ability to remove content from the view of the public and administrators; and (iv) other global functionaries.

- **Staff sponsor for Ombudsman Commission.** CA acts as the staff sponsor and liaison for the Ombudsman Commission, a role delegated by the Board to oversee privacy issues. The team runs an annual Ombudsman selection process, calling for candidates from the community and evaluating them. Selected candidates serve on a committee that represents the diversity of the movement, in terms of gender, geographic location, and language. The team serves as a first point of entry for the Commission when they need to speak with staff members in the course of their work as guardians of the privacy policy's implementation.
- **Answers@Wikimedia.** CA manages the answers@wikimedia.org mailbox, which is an entry point for users and the general public with questions for the WMF. Some frequently asked questions are archived to our website for future use. The team handled about 1,400 emails in 2013 with about 850 requiring responses.
- **Responding to postal mail.** CA evaluates and responds to or redirects postal mail sent to the WMF by readers, community members, and others. Working jointly with legal or other teams, CA evaluates what, if any, response is required and coordinates that response. This process happens for about 150 pieces of mail per year.
- **Advanced privileges and user rights:** The CA team manages requests for advanced user rights required for a staff member's work. This includes working with the staff member and their supervisors to find the right level of access, and liaising with the stewards in our community to assign those rights. CA also works with the community to answer questions about a staff member's use of their account, or to remove unneeded rights when, for example, an employee leaves the WMF. They also randomly audit the use of these rights. This amounts to around 35 requests a year as of early 2014.
- **Mailing list product ownership.** CA acts as the non-technical product owner of the mailing list system. This includes overseeing the creation of lists by authorized community members (and helping as needed) and responding to any request requiring use of the master password. As of early 2014, there are about 50 requests per year in relation to this workflow.
- **Onboarding new staff.** CA has experimented through the years with multiple methods for onboarding staff and introducing them to the Wikimedia community. As of early 2014, onboarding is primarily done through video presentations and occasional one-to-one training sessions.
- **Search warrant and subpoena compliance.** Our Legal team aggressively defends against search warrants and subpoenas requesting information about our users. However, when a credible challenge is not possible under the law, CA assists in responding to these warrants and subpoenas. Under the direction of the legal team, they seek to notify the subject of the warrant or subpoena when possible, provide guidance when appropriate to challenge the order, gather technical information from the projects while using specialized tools, log the release of this information, and assure that evidence is preserved as appropriate.
- **Contact management database.** CA uses the open-source product SugarCRM as a case management tool for our team and Legal (as well as others). They conduct user audits, and assure that technically-privileged information remains separated and accessible only by those who should have access. As of early 2014, the system houses almost 8,000 contacts and several thousand case histories.
- **Internal-I mailing list and Internal-wiki.** Internal-I is a list used to communicate with key volunteers in chapters. Historically, it occupied a larger role in governance than it does today. CA assists with the moderation of this list, including adding and subtracting members as each chapter updates their governing board. There are approximately 75 requests per year related to these lists.

### **International community advocacy: We help bridge the language gap to non-English speaking communities.**

The Community Advocacy team is tackling the language barrier that exists between the WMF and non-English speaking project communities with a small, multilingual team of international community advocates. We build and maintain contact with leading Wikimedians around the globe to better understand the perspectives of their communities, and to get their advice on the WMF initiatives as

they develop. For example, in 2013 our first international advocate was hired in Germany; the advocate has also developed broad contacts with the Spanish language wikis and chapters, including with Iberocoop. As of early 2014, we also maintain close relationships with the Portuguese and Indic language encyclopedias. Nearly 200 new contacts were added to our contact management system in support of this initiative through 2013.

## Communications

The Communications teams leads the WMF's efforts to openly and effectively share information -- about the movement, the Wikimedia projects and the WMF's work itself -- with a global audience of volunteers, readers, users, and other stakeholders.

### **Answering media requests: We support the credibility of our community and projects by fielding the questions of international journalists.**

As the operator of the world's fifth most visited website, supporting a collaborative project that is unique in history and continues to amaze and puzzle the public, the WMF receives a great deal of media requests (handling more than 350 direct media contacts in 2013). Communications works to increase the credibility of our projects by collaborating with a global network of reporters on stories in the world's most-respected media outlets. We anticipate complex public and media relations issues within the Wikimedia movement, and support the WMF spokespeople and our global network of communicators in terms of messages and communications strategy.

### **Proactive media outreach: We bring the Wikimedia story to journalists.**

We work closely with every part of the WMF to develop communications plans, products, messages, and briefs to launch new products; to channel other news and changes to the public; and to support a thriving global conversation about the Wikimedia movement. We extend our services and support to volunteers and organizations in our movement to promote and communicate about new initiatives. Besides promoting major news in the form of press releases (18 in 2013) that are sent out to a subscriber base of more than 2,000 journalists, we also ran 11 major targeted media outreach efforts in 2013. Sometimes this involved very targeted outreach (e.g. on the topic of black hat editing in 2013), at other times more large-scale outreach to our 2000+ email list on topics of general interest (e.g. Wiki Loves Monuments) and in some cases doing outreach to trade press (e.g. profiles of our leadership team). In 2013, more than 370 calls were placed in the course of the 11 proactive outreach efforts.

### **Wikimedia blog: We operate the largest hub for news from the Wikimedia movement.**

We run [blog.wikimedia.org](http://blog.wikimedia.org), which has evolved into a hub communicating the stories and narratives of the wider Wikimedia movement--beyond the activities of the WMF--to thousands of readers. Besides news from the WMF, we are regularly publishing updates from volunteer Wikimedians and Wikimedia chapters, as well as profiles of Wikimedia project contributors, Wikimedia Commons photographers, MediaWiki developers, and more. In 2013, the WMF blog team wrote or edited around 400 blog posts, about a quarter of them multilingual. Most posts are prepared in a transparent, public editorial process on Meta-wiki.

### **Social media: We make the Wikimedia voice heard by millions of followers on social media sites.**

We operate the official accounts for Wikimedia and Wikipedia on social media sites such as Facebook, Google+ and Twitter. With more than a million followers combined, these social media sites have become essential for promoting news and activities from the WMF and the wider movement. For example, during January 2014, the social media team posted 89 tweets or retweets on the @wikipedia Twitter feed. These are drafted and reviewed in an open, transparent process (carried out on a public mailing list and a Meta-wiki page) that invites community participation.

### **Monthly and annual reporting: We keep the WMF transparent and accountable by publishing regular, comprehensive updates on our work.**

We edit and publish the monthly Wikimedia Foundation reports, which are a basic instrument of transparency and accountability for the WMF. Together with the monthly engineering reports, they enable our community and the public to stay up to date on the ongoing work of the WMF's 200 or so employees and contractors, and provide updates on core financial data and usage stats. We provide a separate version optimized for translation, the Wikimedia Highlights, which combine an excerpt from the WMF's report with news from the entire movement. Volunteers translate or partially translate it into more than 10

languages each month (often, it is the only source of news about the WMF and the global movement for a particular language community in their own language). We also prepare the WMFs annual reports, which tell the story of each past year to the public, and in particular to our supporters.

**Communications design: We create and sustain open and collaborative visual identity and design solutions for the movement.**

Communication design provides design development to any WMF department outside of Tech to assist with building, explaining, and evaluating projects, organizing online information, creating assets, holding brand identity, and developing and supporting discussions and relationships in the community surrounding projects and Wikimedia design issues. Responsibilities include:

- Research, design, building, and upkeep of on-wiki department projects on wiki, including community involvement (roughly 15-20 projects per year, with continuous upkeep)
- Posters, postcards, other print-ready materials for any department (roughly 10-15 per year)
- Presentation assistance, slides, and other media
- Special design projects that include sourcing vendors and asset creation (roughly 15-20 per year)
- Holding (with Legal) trademark and brand identity

## **Human Resources**

The Human Resources department develops organizational culture and leadership, and is responsible for personnel administration, in service of the ongoing maturation of the WMF. The WMF employees and contractors experience being supported in doing mission-critical work within a healthy work environment. Our focus areas include employee and contractor relations, organizational and employee development, compensation and benefits, payroll, recruiting, and compliance.

**Infrastructure: We manage human resource processes that allow our employees to support our community and the Wikimedia projects.**

We oversee typical HR procedures that range from hiring practices, the processing of vacation and sick time requests and exemptions, immigration needs, the hiring of domestic and internal contractors, changes in titles and reporting relationships, and the administration of payroll and benefits plans.

- **Payroll:** Making sure U.S. employees are paid accurately twice a month, including all payments, deductions, and taxes according to regulations of various U.S. states. On average, we make 260 payments per month.
- **Contractor payment processing:** Making sure project work and international staff get paid timely & accurately (on the average 324 payments per month via oDesk as of December 2013).
- **Benefits administration:** We choose the benefits providers and maintain the plans that offer the WMF staff the best comprehensive personal care we can get for themselves and their families. As of early 2014, we administer 12 different insurance policies, four pre-tax benefits plans, three health/wellness programs, and 10+ time-off programs.
- **Performance evaluation:** We design and manage the staff performance evaluation protocol and structure.
- **Immigration:** We support bringing in employees who come from other countries to live and work in the United States. As of early 2014, we maintain 21 H-1B visas, four TN statuses and one J-1 visa, and support 14 ongoing green card applications.
- **Compensation:** We determine the overall WMF salary structure and benchmark with external entities.
- **Policies:** We design HR policies and practices.
- **Organizational structure:** We are the stewards of the structuring of the WMF's workforce into departments, teams, and reporting lines.

**Recruiting: We find and hire new staff and contractors who will effectively support our community and Wikimedia projects.**

We handle the nuts and bolts of recruiting -- from job publication, to sourcing, to managing candidates through each step of the candidate pipeline.

- **Job publication:** We make sure that talented people know when we have open positions by posting jobs in high-traffic places, using social media, and attending and organizing recruiting events.
- **Sourcing:** Our recruiters actively source candidates from other organizations who may be great fits for roles that we need.
- **Candidate handling:** We work to create a responsive recruiting experience for prospective employees. On the average, each month we have around 10 active requisition numbers for new employees. To fill these, each month on average, we screen around 750 resumes and schedule around 130 candidate interviews, resulting in around five new hires each month, for which we provide onboarding and setup. Conversely, we ensure graceful and secure departures for employees who leave the WMF (for the first seven months of the 2013/14 fiscal year, the turnover rate was 9.8%, which is well within the usual rates for our area).
- **Contractor management:** We partner with the rest of the organization to bring onboard people with specialized skills for specific projects. On average, we support the hiring of about eight new contractors or temporary employees each month, and the renewal of more than 15 such contracts. As of February 2014, there were 102 contractors, 52 of them based outside of the U.S., in 23 different countries.

**Leadership & culture: We develop leaders capable of handling the complexity of our operating environment, and maintain an organization in which people thrive.**

- **Training:** We increase the level of skills and capabilities of staff at the WMF, and also ensure completion of government-required trainings (like sexual harassment prevention).
- **Onboarding and offboarding:** We manage the WMF's onboarding program for new employees, and also support organizational transition out of the WMF, including exit interviews.
- **Leadership development:** We run the WikiLead program (for directors and other WMF management) and other initiatives, such as a coaching program and retreats for the WMF Board as well as the C-level executive team to support the development of leadership in an incredibly complex environment.
- **Issues management:** We deal with crucial personnel issues, especially where challenging interpersonal dynamics occur at the team level in the organization.
- **Events:** We host events that bring people throughout the WMF together. These events include the annual two-day AllHands meeting, the annual holiday party, and various forms of informal group support. For example, we support the "incubator group" -- employees who want to make the workplace better -- and the "aliens group" -- U.S.-based employees who are foreign nationals.
- **Internal change management:** We support key organizational shifts, such as departmental restructurings, leadership transitions, and changes in strategy that significantly impact staff.

## Finance and Administration

We are responsible for the WMF's money, and provide the infrastructure for staff work.

The Finance and Administration department is responsible for both the timely and professional overview of all financial processing as well as for over-seeing the physical space and technological/infrastructure needs of the WMF staff.

**Core financial responsibilities: We process financial transactions and report them, to ensure transparency with our community.**

The core responsibility of the Finance team is to accurately and promptly process the WMF's financial transactions, and to manage financial reporting, which is essential for the organization's strategic decision making. The top outcome is the successful completion of the annual audit (where the team supports the Board's Audit Committee) and the publication of the WMF's 990 form, as required by law. The team also coordinates the work on the WMF's Annual Plan. Financial processing involves settling accounts with hundreds of the WMF's service providers and contractors. In the 12-month period from December 2012 to November 2013, approximately 2,500 payments were processed for accounts payable and grants. On the income side, millions of small transfers from every part of the world were processed as part of the WMF's continuous fundraising activity (in cooperation with the Fundraising department).

## **Supplemental financial services: We handle the WMFs financial strategies, and provide financial expertise for our grantmaking activities.**

Finance is also responsible for managing the WMF's cash balance of approximately \$55.34 million as of December 31, 2013. We research and choose investment strategies, and undertake risk management strategies (like developing our insurance portfolio) to protect the WMF, its Board members, its employees, and its assets, including the websites. Finance supports the WMFs grantmaking work, for example, ensuring compliance with U.S. federal, state, and international law. Finance carries out site visits to grantee organizations, conducts detailed financial reviews--like those for FDC applications--and provides expert advice to the Grantmaking staff.

## **Office IT and Administration: We provide the physical and IT infrastructure that our staff needs to serve our community and the Wikimedia sites.**

The Office IT team handles the IT infrastructure in the San Francisco office (such as desk PCs, internal servers, networking infrastructure, videoconferencing equipment). The Administration team provides the support staff for each team; as well as the physical infrastructure that the rest of the organization needs for their work, such as planning and managing the office space. We provide travel support to employees, Board members, and others working for the WMF: in 2013, we issued 815 flight tickets and booked 1,931 hotel nights.

## **Notes**

1. ↑ <http://www.ohloh.net/p/mediawiki> , <http://www.ohloh.net/p/mediawiki-extensions-wmf>
2. ↑ <http://korma.wmflabs.org/browser/contributors.html>
3. ↑ *RT# 6701 Bugzilla data on WMF staff activity in 2013 (login required)*
4. ↑ <https://en.wikipedia.org/wiki/Special:SiteMatrix>
5. ↑ <http://korma.wmflabs.org/browser/scr-companies.html>
6. ↑ *MediaWiki 1.21-wmf7-12, 1.22-wmf1-22 and 1.23-wmf1-8.*
7. ↑ *This number is tracked in the monthly engineering reports*
8. ↑ <https://blog.wikimedia.org/2014/01/07/tech-news-fighting-technical-information-overload-for-wikimedians/>
9. ↑ [https://www.mediawiki.org/wiki/Technical\\_communications/Tech\\_blog\\_activity](https://www.mediawiki.org/wiki/Technical_communications/Tech_blog_activity)
10. ↑ *Number of hosts reported by the Ganglia monitoring tool. The actual number is slightly higher as this doesn't include offline and spare servers.*
11. ↑ *Wikimedia Foundation 2011/12 Annual Report*
12. ↑ *RT stats: ResolvedAnnually (login required)*
13. ↑ [https://www.mediawiki.org/wiki/Wikimedia\\_engineering\\_report/2013/December#Technical\\_Operations](https://www.mediawiki.org/wiki/Wikimedia_engineering_report/2013/December#Technical_Operations)
14. ↑ <https://blog.wikimedia.org/2013/04/08/intro-to-the-statistics-of-ab-testing-with-wikimedia-fundraising-banners/>
15. ↑ See e.g.: *Kim Willsher, French secret service accused of censorship over Wikipedia page, The Guardian, 7 Apr 2013, (see also Statement from Michelle Paulson); Adi Kamdar, CDA 230 Success Cases: Wikipedia, Deeplinks Blog (Electronic Frontier Foundation, ed.), July 26, 2013,*
16. ↑ <sup>to:16.0</sup> <sup>16.1</sup> *Wikimedia Foundation Transparency Report for FY 2012-13 (draft, to be released in 2014)*
17. ↑ *Examples of successful litigation include cases in Germany, Italy, and the U.S. See Michelle Paulson, Two German courts rule in favor of free knowledge movement, Wikimedia blog, December 4, 2012; Michelle Paulson, In a legal victory for Wikipedia, the Wikimedia Foundation wins lawsuit brought by former Berlusconi advisor, Wikimedia blog, June 26, 2013; Geoff Brigham, A victory for Wikivoyage and free knowledge, Wikimedia blog, February 15, 2013.*
18. ↑ *Defense of Contributors Policy and Legal Fees Assistance Program; see Geoff Brigham, The Wikimedia Foundation Legal Fees Assistance Program, Wikimedia blog, August 31, 2012.*
19. ↑ *Michelle Paulson, Wikimedia Foundation supports Wikipedia user subject to defamation lawsuit in Greece, Wikimedia blog, February 14, 2014*
20. ↑ *Privacy Policy, Access to Nonpublic Information Policy, Requests for User Information Procedures and Guidelines, Data Retention Guidelines, and a Transparency Report.*
21. ↑ *Geoff Brigham: Terms of use, Wikimedia blog, December 31, 2011*
22. ↑ *Apart from the examples described here, these include the Legal fees assistance program, the Guidelines on potential conflicts of interest, and the Policy and political association guidelines.*
23. ↑ *Michelle Paulson, A Proposal for Wikimedia's New Privacy Policy and Data Retention Guidelines. Wikimedia blog, February 14, 2014*



24. ↑ *Michelle Paulson, Developing through Collaboration: A New Access to Nonpublic Information Policy. Wikimedia blog, February 14, 2014*
25. ↑ *Yana Welinder, Announcing Wikimedia's New Community-Centered Trademark Policy, Wikimedia blog, January 19, 2014*
26. ↑ *Yana Welinder, Launching an Unconventional Trademark Policy for Open Collaboration, Wikimedia blog, February 12, 2014*
27. ↑ *Michelle Paulson, Licensing at the Wikimedia Foundation, Wikimedia blog, November 2, 2012*
28. ↑ *For example, the Wikimedia Foundation successfully filed complaints with the World Intellectual Property Organization to transfer domains from cybersquatters. See, e.g., WIPO Case No. D2011-0106 and WIPO Case No. D2011-1592, or Foundation secures cybersquatting domain, Wikipedia Signpost, February 22, 2010, News in brief, Wikipedia Signpost, August 8, 2011*
29. ↑ *Yana Welinder and Stephen LaPorte, Wikipedia Shows the Value of a Vibrant Public Domain, EFF Deeplinks blog, January 14, 2014; Dario Taraborelli, Geoff Brigham, and Kat Walsh, Wikimedia Foundation endorses mandates for free access to publicly funded research, Wikimedia blog, May 25, 2012; Geoff Brigham, Stephen LaPorte, The power of free knowledge, Wikimedia blog, March 29, 2012; Geoff Brigham, Fighting for the Public Domain, Wikimedia blog, June 22, 2011.*
30. ↑ *Geoff Brigham, The recent UK report and movement governance, Mar. 19, 2013.*
31. ↑ *Alice Wiegand, WMF Board publicly rolls out its updated governance handbook, Wikimedia blog, December 26, 2013*
32. ↑ *In 2012 and 2013, such resolutions included the revised Board Governance Committee Charter, the Guidelines on potential conflicts of interest, the Transition committee, and the Audit Committee Charter.*