April 2021
Version 0.9 (NOT READY FOR WIDE DISTRIBUTION)

Funding the fun

– Increased sustainability and brand awareness through local fundraising

TL;DR: The work with developing and maintaining tools, services and more on a global scale demands significant investments. Currently the main fundraiser in the movement is Wikimedia Foundation (WMF) who collects funds and they are then distributed globally. For a thematic hub to not use up a too large part of the funding collected by WMF, and to bring in *more* funds to the movement investments in localized fundraising is needed.

For donation fundraising from the hubs mainly make sense if: (1) They are located in wealthy countries; (2) They can generate funds in a way that not only supplements the global banner fundraising, but actively supports it and makes it stronger. It is crucial to ensure that the local fundraising is not creating risks for the banner campaigns; (3) They have dedicated professional staff working on it, but in a way that keeps overhead and duplication of work from other fundraising teams to a minimum.

So called *Face2Face (F2F) fundraising* (where we have campaigners out informing and getting people to sign up for recurring donations), *social media fundraising* where we use branded content on social media to attract content, and phone calls to companies and organizations are three complementary approaches that have been identified as opportunities that also are likely to support WMF's banner campaign as the fundraising efforts effectively builds brand awareness.

As a specific movement entity, thematic hubs are expected to have some unique opportunities as well. E.g. as expert bodys with a global scope there are multiple avenues for fundraising through different project or programmatic grants.

Concept summary

- Sweden is a wealthy country and local fundraising is suitable. Wikimedia Sverige has the experience and staff with significant fundraising experience to implement it.

- Dedicated Face2Face (F2F) fundraising teams are formed and work in a number of locations in Sweden.
- They do not only convince people to give recurring donations but actively inform them about the work done by the Wikimedia movement. 10,000s of people will have a significantly deeper understanding of Wikimedia.
- Social media campaigns and phone calls to companies to attract donations are complementing the efforts.
- As Wikimedia Sverige's experience in fundraising efforts are limited we would benefit a lot by learning from the experience gained by Wikimedia Foundation and other Wikimedia affiliates. A network for fundraisers in the Wikimedia movement is therefore important to establish.
- As the proposed methods for fundraising are fairly untested in the Wikimedia movement work will be done to share the knowledge and experience gained with other Wikimedia affiliates through the established Wikimedia fundraising network.

Background

Sweden is a wealthy country and Wikimedia Sverige has worked for the last 10 years to self-fund a large part of the organization's activities. Nearly all of the funds collected has been through project grants. This has been successful over the years and has allowed the chapter to increase its staff size to a total of 16 staff members in 2020, of which around half were funded by local means. However, project grants are, by the very definition, limited in time and with a set focus. This means that to maintain tools or initiatives over time the organization has had to look into different alternatives for funding. The association has tried to identify funders that would be willing to cover its general operating expenses but have so far fallen short.

F2F fundraising is a common method used by established organisations to build long term revenue from a donor/member group recruited via direct debit. The organisation does not only grow in funds it also grows in strength by the number of members that donates to the cause.

For a lot of organizations a recurring donor program, where F2F is organized on a yearly basis, have made a significant difference for their financial stability. The fundraising method has had a profound impact on for example one of the biggest NGOs in Sweden. In that organization the F2F program started in 2004/2005. The first years of campaigning on the street were of a smaller scale. Smaller teams tested different approaches, themes, ideas etcetera but as the NGO gained more experience more resources were put into the program. By 2013, their donor/member base had reached 100,000 individuals (90 % were members). The number was reached after five years of a steady inflow of around 10,000 new members recruited per year. Of the 100,000 individuals 80 % came from F2F and signed up via direct debit.

The financial benefits of a recurring donor program is as mentioned long term. Although there is a level of attrition one important KPI to look at is LTV, or Life Time Value, of the donor. This is because the revenue generated is consistent over time thanks to the donors or members being recruited via direct debit, while the majority of the cost of recruiting is happening at the beginning of the campaign. The following years the costs are limited to communication and membership care.

Furthermore, F2F campaigns offer a great opportunity to increase *brand awareness* as the many thousands of individuals that are approached learn the basics about the organization, even if they in the end do not donate money at that time.

However, despite the significant funding these types of campaigns can generate over time for an organization, no F2F campaigns have, to the best of our knowledge, been used at scale by any Wikimedia affiliate to date. The hope is that this approach can be developed into another stream of funding for the movement and allow affiliates across the world to be more bold and ambitious in their plans.

In 2020 Wikimedia Sverige hired a new staff member with nearly a decade of experience around fundraising in Sweden at one of the largest NGOs in the country who led the preparations of the establishment of fundraising capabilities in the organization in 2020. The goal was to initiate early experiments to be able to evaluate the costs and benefits for this type of fundraising for an increase of activities in 2021/2022.

Early experiments were conducted in late 2020 around F2F, social media fundraising and phone calls to companies. All the experiments were small in scale to test the material that had been developed. The experiment gave us important insights and confidence that further experimentation and testing is worthwhile.

Wikimedia Sverige is a member organization in Giva Sverige, the Swedish Fundraising Association, which is a professional membership body for fundraising organisations in Sweden. From them we receive regular updates around fundraising trends which allow us to adjust to best practice and adjust our plans until we launch our campaign.

Over the years Wikimedia Sverige and the Advancement team at the Wikimedia Foundation have had the opportunity to work together at a number of occasions. On a yearly basis Wikimedia Sverige's staff has supported the Advancement team with proofreading of the planned banner texts. The teams also worked together in 2018 to create an email campaign inviting the donors to create user accounts, do their first edits, contact mentors, visit meetups and eventually become regular wikiholics.

The Advancement team at WMF and Wikimedia Sverige initiated a cooperation between May and December 2020. A number of meetings and discussions were held and the Advancement team shared material and their experiences with Wikimedia Sverige's fundraiser who integrated it into the processes and material that was being developed during the period.

Wikimedia Sverige also worked to build its presence on social media platforms and utilized events such as Wikimania 2019 in Stockholm to do so. The amount of followers increased by nearly 300 % in 2020. An active work on social media during 2021 is planned and the amount of followers is expected to increase significantly. Social media and F2F campaigns can be organized to support each other by building brand awareness in a given geographical area before the campaigners are sent there.

Discussions to form a fundraising network with EDs at different Wikimedia affiliates were initiated as early as in 2018 with a very positive response and strong interest; but to date no affiliate has stepped forward to dedicate the time needed to coordinate such a network. Many

are however currently working to scale their fundraising capabilities and are struggling with the same issues.

Connection to the strategic recommendations

This initiative is aimed to contribute directly to the fulfillment of the following strategic recommendations:

- 1. Increase the Sustainability of Our Movement, especially achieving the envisioned change and action “Increase awareness about the Wikimedia Movement, its values, achievements, projects, and communities worldwide – to secure the attention, trust, and interest of knowledge consumers, volunteers, partners, and donors.” as the fundraising efforts outlined in this concept paper are designed around direct contacts with potential donors, both people and organizations; and the action “Explore new opportunities for both revenue generation and free knowledge dissemination through partnerships and earned income.” as Wikimedia Sverige’s experiments around fundraising will have the potential to increase revenues in many countries if replicated.
- *4. Ensure Equity in Decision-making*, especially achieving the envisioned change and action "Supporting organizational growth through tailored advice and peer support", as the knowledge exchange between Wikimedia Foundation’s advancement team and Wikimedia Sverige will support the growth of the organization.
- *5. Coordinate Across Stakeholders*, especially achieving the envisioned change and action "Create and keep updated shared documents defining clear responsibilities and expected capabilities for specific activities ...", as this will be a key focus to agree upon between the fundraising teams taking part in the fundraising network.
- *6. Invest in Skills and Leadership Development*, especially achieving the envisioned change and action "Create a systematic, global approach to skill development for local communities, their people, and their organizations", as the envisioned fundraising network between multiple Wikimedia movement organizations (and later perhaps also other free knowledge organizations) will allow for people involved in fundraising to share and learn from each other.

The fundraising efforts are intended to be an integrated part, e.g. one piece of the puzzle, of a larger effort to build capacity in Sweden to support the implementation of the 2030 Strategic recommendations.

What is the Funding the fun concept? What opportunities does it bring?

Fundraising

1. An experimental set of activities to raise funds for the Wikimedia movement’s work in Sweden.
2. An opportunity to bring in local donations that will allow for subsidiarity and self-management for Wikimedia Sverige as the funding will be without strings attached. This will allow Wikimedia Sverige to work and plan more long-term than before.
3. An opportunity for the Wikimedia movement to increase the amount of money available for activities across the world and to cover the costs of the implementation of the 2030 Strategy – which is likely to be very costly if fully implemented.

4. A way to allow for contextualization of the fundraising efforts to Sweden's specific context. The insights gathered will be shared with Wikimedia Foundation's advancement team to give ideas of other types of messages to A/B test.
5. An increase in collaboration and cooperation between the advancement team at Wikimedia Foundation and Wikimedia Sverige as the increased exchange of ideas and information are likely to create new opportunities to work together.
6. A way to make Wikimedia Sverige more resilient and ready to handle challenges as the organization will have a stronger financial ground to stand on.

Network

1. A structured and coordinated network between Wikimedia organizations interested and vested in fundraising.
2. An opportunity for key staff members and volunteers from free knowledge organizations to learn from each other about fundraising and foster valuable personal bonds through a professional network.
3. A possibility for Wikimedia organizations from across the globe to save resources by being able to learn from each other and by doing so increase efficiency.
4. An increase in collaboration and cooperation with different network members as the regular meetings are likely to lead to new partnership opportunities as the shared needs get clearer.

What is the Funding the fun concept **not**?

Fundraising

- The goal is not to replace or take over the banner fundraising, as this is already highly efficient and well suited to be centralized, but an effort to supplement and contribute to it.
- The tactics used, such as F2F, are not a dedicated branding campaign. The goal is ultimately to generate revenue in the short term – the increase in brand awareness is a positive side effect from the type of fundraising tested.

Network

- It is not an open network for any organization in society that is active in fundraising. It is a dedicated professional network mainly for Wikimedia organizations and, perhaps, for other free knowledge organizations such as OpenStreetMap or Open Knowledge.
- Even though it is a professional network it does not exclude volunteer participants that are responsible for fundraising in their communities.

How will the Funding the fun be organized?

Fundraising

- Regular meetings between Wikimedia Sverige's fundraising staff and Wikimedia Foundation's Advancement team will be organized to share knowledge and insights around messaging, to find ways to share information and material of relevance and, if suitable, also design joint activities such as email campaigns etc.
- Wikimedia Sverige will (re-)hire a small group of campaigners to work part time with continuing the preparations of scripts and to test the different aspects of fundraising software.

- The knowledge gained from the experiments in 2020 will be put to use and in late 2021 or 2022, with the hope that life in Sweden will be back to normal after the pandemic, a larger group of campaigners will be hired, trained and equipped to work part time with the F2F fundraising.
- A partnership format for different partner organizations in Sweden will be developed, where the campaigners will be able to fundraise inside of the organization's venues. E.g. at a museum or at a university. This partnership format, if successful, will be shared to other affiliates in the network as part of the joint capacity building efforts.
- Wikimedia Sverige will continue to produce material for hiring and best solutions for employment for a group of staff that work exclusively with F2F. This includes a Performance management program with Development plans and exit plans. The material will be translated into English for distribution with other Wikimedia affiliates.
- Wikimedia Sverige will investigate the needs regarding more advanced CRM solutions, payments options etc. when the amount of fundraising is increased.
- Wikimedia Sverige will organize a set of experiments to investigate the effects and possibilities regarding crossover fundraising, e.g. to translate/transfering the message used during Face2Face and apply it in other channels, such as social media and with phone calls to organizations to ask for financial or *pro-bono* support.
- Wikimedia Sverige will prepare, plan and execute a few test campaigns where volunteers, instead of hired staff, are leading the work. The experience and all needed material to establish similar initiatives will be compiled and shared with other affiliates.

Network

- Wikimedia Sverige's staff will coordinate the practical parts of the fundraising network, at least during the first year (2021-2022). This will include putting together a list of all the staff working with fundraising within the Wikimedia community.
- Wikimedia Sverige's staff will develop a documentation plan for the network.
- Wikimedia Sverige's staff will coordinate the work and create a space where initial conversations can be held regarding:
    - Objectives for the network.
    - Finding a space where we can share material/chat and have calls regarding fundraising.
    - Make an inventory of fundraising competences we have within the community.
- Wikimedia Sverige's staff will support the network with preparations and follow-up for the digital and physical meetings. The regular meetings can be an opportunity where we share best practices/tools etc. and also extends invitations to outside speakers to get their point of view.
- Wikimedia Sverige's staff will support the organization and follow-up of at least one in-person event per year, if the pandemic allows for it. The event is most likely organized in connection with another Wikimedia event to save the amount of travels in a year, both for financial and environmental reasons.
- The participating Wikimedia organizations share parts of the costs. The affiliates pay for the staff time needed to take part in the network. For the physical meeting the costs for travel are covered through the grant.
- The network will jointly create toolkits for different fundraising methods (within F2F or other fundraising) to lower the threshold for other affiliates to initiate active fundraising campaigns in their areas.

Outstanding questions to solve

- How fast can a fundraising team generate enough funds to be self-reliant?
- What information/knowledge is most valuable to compile and share with underserved Wikimedia communities? What other type of support will they need to be able to scale fundraising efforts locally? Can technical systems etc. be shared/co-developed?
- Who should participate in the network? Are there any costs or demands associated with it?
- What should we evaluate it based on? We need to define what success looks like.

=== DRAFT BELOW ===

OKRs July 2021-June 2022

Fundraising
Objective 1: ?

KR 1: ?

Network

Objective 2: ?

KR 1: 4+ participating Wikimedia organizations have joined in the network.

Timeline

Date	Action	Responsible at Wikimedia Sverige

Budget

Total cost for the exchange program per year

Budget post	**Cost**	**Comment**
Travel expenses		
TOTAL	**euro**	

Mini dictionary

- Campaigners
  - A person that is supporting the association with fundraising out on the street or in busy locations. A campaigner can be either a staff member or a volunteer that has received training from the association.
- ED
  - Abbreviation for Executive Director, the senior operating officer or manager of a Wikimedia affiliate or the Wikimedia Foundation.
- F2F
  - Abbreviation for Face2Face. See Face2Face. Another name for F2F is Direct Dialogue.
- Face2Face
  - A type of fundraising where an organization has campaigners out on the street or in busy locations informing and getting people to sign up for donations to a specific charity or cause. Also known as street fundraising. F2F can also include Door2Door, and field marketing in venues.
- GLAM
  - An acronym for **g**alleries, **l**ibraries, **a**rchives, and **m**useums, the cultural heritage institutions.
- GLAMwiki
  - An acronym for volunteer and staff working to enhance partnerships between **g**alleries, **l**ibraries, **a**rchives, and **m**useums (GLAM) and the **Wiki**media (wiki) communities.