WMUK 2013-2018 Strategic Planning Paper

Peter Williams, Amida Consulting

Purpose of this paper:

Amida Consulting was engaged to gather the views of WMUK Board and staff in preparation for drafting a strategic plan 2013-2018. This paper draws together those views and highlights some emerging issues and priorities. Board and management will need to process the contents of this paper, following further contributions from WMUK members and the community.

Process

Following some initial conversations with WMUK's CEO, Amida drew up a set of questions around the Strengths, Weaknesses, Opportunities and Threats facing WMUK, as well as asking for views on the current changes and challenges impacting on partners, policy makers and the wider public. Respondents also gave their views on where they would want to see WMUK in 2018, and strategic priorities for the coming time period.

The survey was issued through Survey Monkey and the findings were explored further in face-to-face meetings and telephone calls with Board and staff. Views were gathered from all concerned including survey responses from new members of staff. The survey was completed by 14 people (1 incomplete), and 11 interviews took place (+1 cancellation).

EXECUTIVE SUMMARY

The survey and interviews generated many pages of notes and comments – a large body of which is familiar to the staff and Board of WMUK. The activity plans of 2012 and 2013, already contain most of the issues which surfaced. A full list of strategic priorities - both external (i.e. impacting on the world) and internal (i.e. building WMUK's capacity and policies) are set out in the final Section 6, pages 18 onwards.

The rest of the report, Sections 1-5, sets out what was said or written under the various questions - the stages in exploring WMUK Strengths, Weaknesses Opportunities and Threats.

The headline difference proposed is the setting out of WMUK's strategic objectives, the main outcomes which if achieved would show that WMUK is achieving its mission **to help people and organisations build and preserve open knowledge to share and use freely.**

A number of people said that WMUK needs to improve its plans and systems so it can measure its success. It is the writer's firm view that, in evaluation terms, engaging volunteers, recruiting editors, delivering events, forging partnerships are indicators of only 'intermediate' outcomes. Beyond those achievements, however important, the question is raised - to what end will there be more volunteers, events etc.?

How could an observer tell if WMUK had helped people and organisations build and preserve open knowledge? The writer proposes the following formulation, although WMUK insiders will no doubt be able to improve on the concepts and wording:

WMUK will improve & extend Wikimedia projects content, and enable more free knowledge content on the widest range of public sites.

These would be the strategic level outcomes, which would bring about the impact of **more people accessing more free information/knowledge.**

For a fuller exposition see pages 18-19.

A framework such as the above would provide a greater clarity of purpose and enable an assessment to be made as to WMUK's effectiveness and impact, particularly if baselines and targets could be sketched out.

The other headlines are:

(A) Almost all Board and staff are ambitious and confident that WMUK can grow in many ways by more than 50% in the next five years.(see page 15)

(B) Everyone agrees that the numbers of volunteers in particular need to expand exponentially but there are differences about the role of staff and the staff capacity needed to achieve that growth. A trialling phase to find the best model is called for.(see pages 7 & 19,20)

(C) The legal and policy environment in Europe UK and the world on copyright and open access is changing and some people surveyed see opportunities for WMUK to exert a significant influence - and they believe policy work and campaigning should be an essential component in the Strategic Plan.(see page 8)

(D) The international component of WMUK's work requires objectives in order to give shape and focus (see page 23)

SECTION 1: STRENGTHS AND WEAKNESSES

1.1 Strengths and achievements

When asked about WMUK's achievements in the last 2 years, the most frequent responses referred to:

i. Established WMUK as a charity, set up an office, and created a functioning organisation
ii. Employed a strong capable staff team who believe in the mission
iii. Wikimedians in Residence at major institutions e.g. BL ++
iv. Events e.g. Edu-wiki conference, Ada Lovelace event, Editathons, GLAMcamp ++
v. The growth in the number of active partners, primarily through the GLAM and education programmes
vi. Some new volunteers, with better support, including supporting volunteers to deliver events
vii. Train the trainers programme - accrediting editors to train new editors
viii. Wikimeets in Coventry, Manchester, Liverpool, Cambridge ++
ix. Monmouthpedia - and the wikitowns developments

The following achievements were only mentioned once, but both require consideration for the coming time period:

- Governance review
- Innovation - such as the Virtual Learning Environment and other approaches to on-line learning

1.2 Weaknesses and Shortfalls

When asked about the weaknesses or shortfalls, responses can be grouped as follows:

i. An over reliance on a small group of core volunteers, and a failure to establish volunteer networks or grow volunteer numbers as expected particularly not for the "heavier" positions; leading to e.g. concerns about whether we will have good quality candidates for Wikimedians in Residence. WMUK lacks tools to measure whether we are succeeding in volunteer engagement.
Key volunteers have sought paid positions within WMUK which could diminish our volunteer base and risk disappointing members.

ii. Though the charity has about 270 members, discussions are dominated by a handful of vocal people, and often we have not listened to WMUK members, instead listening to 'community members'. Our culture is perhaps too 'wide open', when instead it would be best to be 'honest and friendly open'. We suffer from a culture of criticism rather than encouragement from some of our louder voices

iii. Governance has been ineffective, attracted criticism and undermined reputation and, though now making progress still not fully resolved. Problems have included Board and Chair turnover, and lack of clear, timely, strategic decision-making from board; also micromanagement of staff. Currently there is a very heavy workload on Trustees.

iv. On the whole we are not particularly good at producing verifiable plans of activities or measuring our impact.

v. Limited number of new editors engaged and not tracking new editors engaged or following up

vi. Slow to deliver on working formally with organisations, because of a lack of structure in how we manage the partnerships

vii. The relative roles of board, staff and community are still not well defined and the balance between staff and volunteer ownership of delivering not found yet

viii. Inability to use its resources owing to lack of capacity – under-spending has meant limited delivery

There were a number of perceived weaknesses mentioned only once:

- Institutions such as universities are still wary of Wikimedia
- Retaining membership
- Handling bad press
- Not participating in 2012 Wiki Loves Monuments
- Gibraltar debacle
- Staff numbers have increased but without a credible resource plan.
- Our website is poorly designed, and key initiatives such as microgrants get little traffic.
- Nothing happened in Scotland
- Heavy reliance on one source of income (Wikimedia Foundation) for its operation.
- Leadership
- Furthering the Wiki movement
- Follow-up on events
- Most of our activities, relationships and effort have been towards the south of England, with little to none elsewhere in the country.

1.3   Does WMUK have the right foundations for success in the coming years?

The survey asked if WMUK had the necessary foundations on which to build a successful next five years, specifically:

- contacts/profile
- the money/income
- people
- activity programme

- technology
- support
- reputation

The following table shows their responses:

Indicate how much you agree with the following statements about WMUK's assets
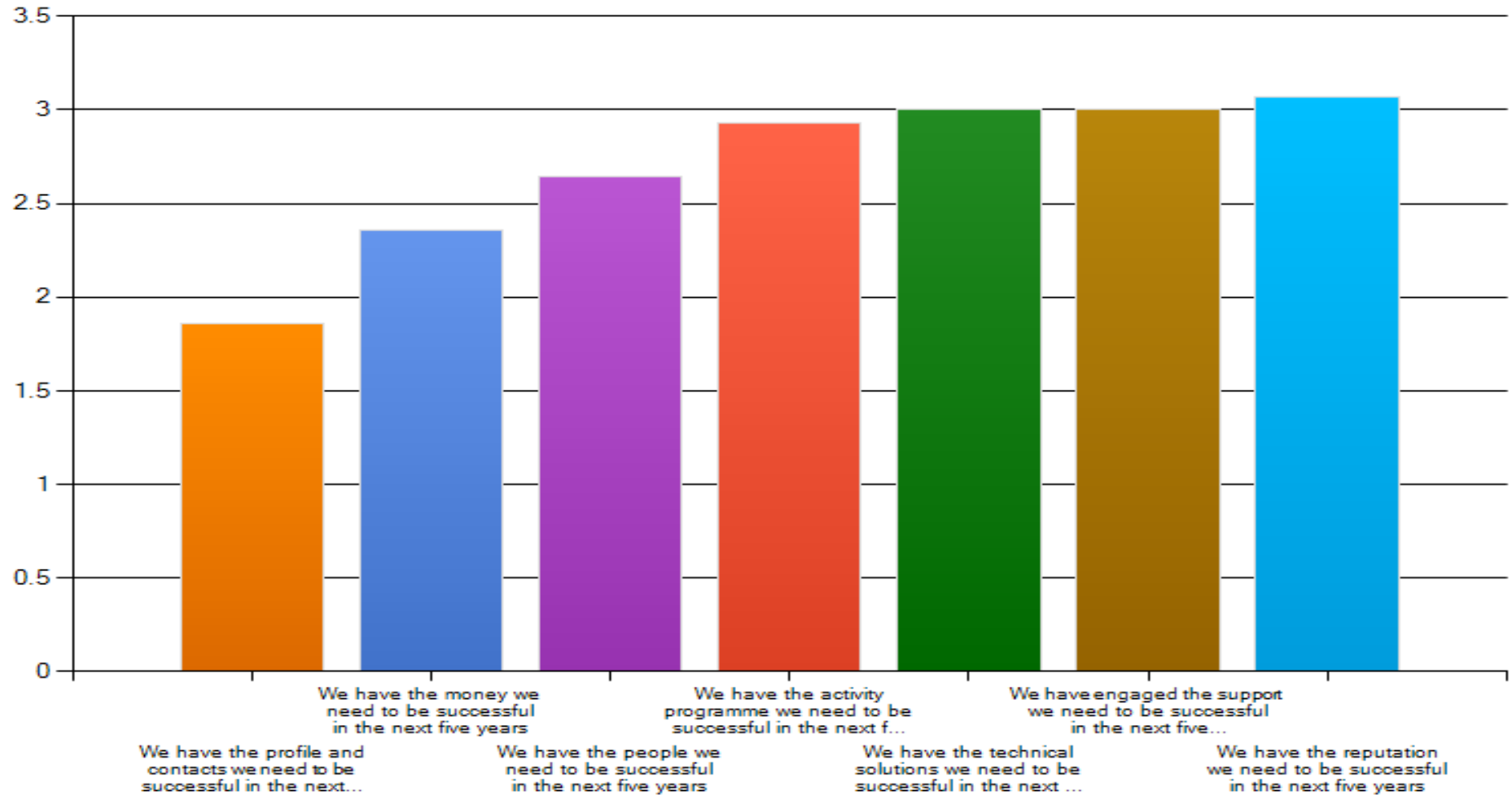
A low score means that there was stronger average agreement with the statement – any score below 2.5 means that on balance the respondents were positive about WMUK's current readiness.

So on columns 1 and 2, Board and staff are predominantly confident that WMUK has the money and the contacts and profile needed for success. However, the right hand column (7) - reputation – reflects that people are quite concerned that WMUK has been damaged by the publicity about governance, conflicts of interest etc.. The next column (6) shows people are concerned that the small pool of active volunteers will impact on success in the near- to mid-term.

On technical solutions, there was a mixed bag of comments, quite a few 'don't know/neither nor'. However one or two people in the know seem to think more is needed/possible.

With regard to the activity programme, there were a number of different comments. Perceptions seem to be divided between the staff who are working on what they see as their programme and Board some of whom are unhappy about what has been presented to them. However, comments also point to a perceived lack of decision-making by Board.

Comments were also mixed about column 3 - does WMUK have the right people? Respondents were mostly positive about staff, there were some concerns about some trustees, and all agreed the organisation needs many more volunteers.

1.4   Discussion on strengths, weaknesses and foundations

Overall, dissatisfaction slightly outweighs pride in achievement but this could just be a reflection of the organisational culture.

In terms of the coming 5 years, a number of issues come to the surface for consideration and inclusion in the next plan:

1. significantly increase numbers and distribution of volunteers, and broaden the profile
2. take steps to improve the communication culture around WMUK
3. complete the governance review actions in this year and develop fit for purpose Board.
4. Further extend partnership working in GLAM, education and other arenas, in a managed and strategic manner
5. Further develop a successful events programme
6. Rebuild WMUK's reputation

SECTION 2: VALUES AND CULTURE

2.1   What do we need to make sure we take forward with us into the future?

The responses can be grouped as follows:

i.   Passion for our mission. Commitment to open knowledge. Providing free information is the core principle of Wikipedia and associated projects and moving away from that would lose us much of our support. The belief in sharing knowledge
ii.   The belief in seeing volunteers as the front-line in creating our websites and delivering our programme An understanding that a strong core staffing element will empower our work and support volunteers in what they want to do. The huge pools of genuine enthusiasm and good will irrespective of where it comes from, trustees, volunteers or staff.
iii. Senior management with strong skills and experience in management, such as strategy formulation, analysis, programme management, risk management and excellent reporting skills.
iv.   All the values of the Open Society ethos and a commensurate awareness of the charity law constraints that determine what we can or cannot do in working with our beneficiaries
v.   Dedicated staff (which we have), consistent funding (which we currently have but are at the mercy of the WMF for), a Board which focuses on strategy and governance, a credible work plan that everyone can get behind and good leadership from the Chair and CEO (which I believe we have).
vi.   The passion and enthusiasm to be involved in the community and push the movement forward.

Others

i.   WMUK was established on the basis of openness and transparency, in a member led setting. This has on a number of occasions been forgotten or ignored.
ii.   Appreciation of challenges faced by staff and volunteers. Sense of humour :) Willingness to apologise/admit mistakes
iii. Holding a leading role amongst EU chapters

2.2   What do we need to leave behind?

Again, grouping the comments:

i.   Stroppy emails or wiki postings, micromanagement, and a sense of confrontation, wherever we find it. Much of the charity's interaction - usually between members and the board - is online, in part because Wikipedia originated online. Discussing things online strips away many of the ways people interact and sometimes discussions can get needlessly hostile. Overcoming this is not easy, but getting people to meet face to face occasionally would be a start. The consistent culture of nit-picking, criticism and petty point scoring. The negative parts of the Wikimedia ethos - public bickering and the habit of stroppy online communication

ii.   The mindset that confuses voting membership of a charitable company with "ownership" as if it were a private club for the benefit of the Wiki Community, and which is thus blind to the charity law duty of the Board to act only in the best interests of all our beneficiaries, the class of which is worldwide and far exceeds the boundaries of the Wiki Community, but which is not enfranchised and therefore depends somewhat on the goodwill and understanding of our voting members

iii. The tedious debates on every little thing that stop things happening and dissuade people from having ideas. Trustees being too focused on operational detail

iv.   Our Board difficulties and the legacy they have left.

2.3   Differences of opinion

The following comments reflect different points of view:

a)   'Leave behind a feeling that the Foundation is an enemy of the Chapter' VERSUS '(Leave behind) Interference from externals like WMF and Wikipediaocracy'.

b)   'Being unrealistic about what volunteers will deliver, and relegating staff to a 'supporting' role in delivering the programme. Staff are passionate and want to drive and deliver things alongside volunteers, not merely do all the dirty work' AND 'An idea that while volunteers are necessarily good staff are necessarily bad. The suspicion that the old ways (pre-staff) were wonderful and that the development of the charity is evil'. VERSUS 'Everything that is not volunteer-centric'. AND 'The belief in seeing volunteers as the front-line in creating our websites and delivering our programme'. AND 'Can we continue to support such a huge bureaucracy as well as an encyclopedia'?

c)   Transparency based on sharing our decisions and having open debates about important issues. VERSUS 'We need to leave behind the madness about being 'completely open'. An organisation should not live-webcast its board meetings - they should put the good running of the charity first, and openness second. Some transparency is bad when it goes against the operation of the charity'.

2.4   Discussion

There is much that unites and inspires Board staff and no doubt the wider community, and this is reflected in the values and dedication to mission reflected in the above comments. There is some measure of agreement about what needs to be left behind, and it would be helpful to move the consensus forward even if unanimity cannot be achieved. Recognising and respecting others' points of view is helpful, even if they cannot immediately be argued away.

The tensions around 'staff versus volunteers' might be 'parked' by seeing the next 2 years as a test bed for different and innovative approaches to finding volunteers, engaging them and enabling active volunteer groups. Some action research on how many volunteers or groups a staff

member might achieve and sustain, in comparison with volunteers leading the same process to build more volunteers might yield useful knowledge to take WMUK forward. Are local or regional networks the way ahead? Or groups based on interests – art, science, local history? How to engage different age groups, genders, ethnicities? What is the shelf-life of a group? A whole range of innovative approaches might be trialled and this would take the discussion from one about contrasting beliefs into one about effectiveness and contribution to mission.

The differences around open-ness and transparency may be harder to resolve, because the values are so fundamental to WMUK. A mood of acceptance that complete transparency can cause some difficulties might be a way of acknowledging each other's points of view. Periodic review by for example a governance sub-committee might also explore any necessary changes to boundaries.

Of similar complexity is the issue around e-mail traffic that can sometimes get excessive and negative. Other organisations have 'protocols' around this issue, and although members and the community could not be expected to be 'held to account' for excesses and negativity, Board and staff should try to make a commitment.

Culture change usually takes time, but a sense of direction is important. WMUK is still a 'young charity' – maturity and growth will inevitably bring change.

Culture change is relevant to the strategic plan in the sense of re-confirming or adapting core values. Identity is an important strategic asset.

SECTION 3: ENVIRONMENT - OPPORTUNITIES - CHALLENGES

What is happening in WMUK's environment and how should those developments shape its strategic plan? The following section includes comments grouped together and discussion notes.

3.1 Digitisation and open access

This was the issue that attracted most comment – and is directly relevant to WMUK's mission.

Board and staff largely share the view that there is a gradual sea change happening where institutions are starting to be convinced of the value of open licensing. This move towards digitisation, and the greater awareness of the possibilities and benefits of creative commons licensing presents WMUK with a significant opportunity to exercise influence towards its mission. People noted that GLAM institutions are recognising value of working with WMUK.

However, many partners/potential partners are in an uncertain funding environment: they are often public bodies whose budgets are cut and are under increased scrutiny. Comments pointed to other obstacles and resistance.

A number of strategic questions arise which WMUK has not yet resolved in relation to this opportunity:

- What should be WMUK's objectives in relation to this movement? Are they responsive and piecemeal or is a vision of new knowledge hubs realistic?
- What should be WMUK's role? Leading? Influencing? Backroom? Technical? Political?
- Which activities make most difference? Wikipedians in residence? Informal or formal partnerships? Lobbying? Events and conferences?
- How much resource should WMUK allocate to this? What about e.g. Co-funding?
- How to balance the contributions of empowered volunteers and paid staff?
- How to make available (even marketize) WMUK's knowledge and expertise?
- How would WMUK measure success or failure in this field – numbers of institutions providing significant open access? Numbers of files/volume of data opened to the public? Numbers of files imported to WP?
- How much to concentrate on some arenas – GLAM, education - and how much to cast the net wider - to cover e.g. science, law, community, government?

If these questions could be coherently answered, and put into a plan, this would form a major plank in WMUK's 5 year strategy.

If this were clear, partnerships would be seen to be instrumental and not an end in themselves. Different types or stages of partnership with WMUK could be defined in relation to WMUK's objectives, and they could be managed more strategically. This would resolve some of the concerns about partnership work heard in the consultation.

3.2 What is changing in the 'eco-system' of other open-knowledge, cultural and educational institutions - both allies and competitors?

Many respondents noted that WMUK is becoming better known as a national body in the field, but the area is increasingly crowded - other organisations are growing and possibly starting to do things better than us. There is a struggle for resources amongst open source people. The 'industry' are becoming more aware of protecting their property.

People also noted that other organisations and institutions are working together a lot more often, and that the next few years will be pivotal - there is an opportunity to build a unified movement.

At strategic level the key decision will be around what WMUK seeks to achieve in relation to these other organisations and the open-knowledge movement. It could be that once issue 1 above has been clarified that these relationships will become instrumental and therefore easier to see in context.

3.3 The battle between openness and censorship (SOPA, PIPA, Digital Communications Bill)

A number of people noted the importance of the current commercial and political debates around this topic for the open-access movement.

WMUK needs to decide:

- What will be its objectives and role in these debates?
- Who will lead on it and how much resource should WMUK commit to it?
- Who will WMUK work with and what will be the tactics?

3.4 Other environment issues for the public and potential partner organisations
- Pressures to have a public engagement agenda / have a bigger online presence
- Digital divide - certain groups not engaging with technologies on offer
- If there is broader participation - how will that change the culture of the open knowledge community
- MOOCs

Biggest issues and challenges facing the global Wikimedia movement

Comments are grouped under 4 headings.

3.5 Editor numbers and diversity
Many respondents reflected on the decline in the number of editors and how to stop it and attract a more diverse contributors base. Diversity includes geography, gender, language and ethnicity.

Decreasing editorship may result in smaller number of volunteers and decreased quality of Wikipedia. Some people felt that lack of editor profile diversity is leading to systemic bias in content and approach on the sites. Some pointed to a drop off in established editor participation, while others pointed to failures in signposting new editors to productive areas and to ways of participating in the projects

A couple of comments raised the possibility of paid Editing emerging e.g. via PR interest in their pages – how should the movement respond?

As well as being a global issue, this clearly has a UK dimension and needs addressing in the strategy.

3.6 Renewing and sustaining the movement
A number of comments were made about a possible generational issue – e.g. the rise of the millennials to a stage where they're no longer the last new generation, and the frequency of negative interactions on WP between established editors and new recruits. Two people noted the issue of 'entrenched users' having more weight in the community than newcomers – 'entrenchment'.

Could the sites become irrelevant as other projects become more successful/easier to engage with? Will everyone find something more interesting to do with their time rather than wikilawyering? What if Wikipedia becomes passé or loses its credibility?

This issue needs to be factored in to WMUK plans to increase numbers and change the profile of volunteers and editors.

3.7 Foundation and Chapters
The vast majority of respondents referred positively to the current Foundation Strategy Plan (to 2015) and its value as a sound analysis of the global movement's challenges and strengths. The Foundation's five strategic priorities were accepted as being a useful prism through which to view WMUK's plans. WMUK's future in their eyes is inextricably linked to the movement, and finalising the restoration of good relations with the Foundation is a priority for 2013/14.

There was a single voice raised to challenge that consensus – seeing a different future as an independent open-access organisation, rejecting the Foundation's leadership and merging into a European movement in the coming years.

Of wider concern were questions about the emerging role of Chapters - how will they cohere and how will the relationships between national Chapters and the Foundation develop? How will funds be distributed over time within the Wikimedia movement?

One Board member pointed to the absolute necessity for WMUK's strategic plan to reflect its personality as a Chapter as well as a UK Charity. If this were accepted, plans would need to be included linked to a vision for the UK Chapter in 2018.

The final version of the Strategic Plan should clarify the above issues with clear statements setting out WMUK's position.

What are the major changes and challenges facing WMUK?

Responses are listed and grouped here in simple bullet point form. Some have already been covered in previous sections.

3.8 Social change
- Shift in relationship between higher education and employment.
- More and more people online and using Wikipedia, digital literacy increasing

3.9 Technical change
- Need to work harder to have a technical committee to deliver on the promise of easier access for editors
- Improvement to the software systems WMUK uses to improve workflow.
- Semantic web
- Accepting more closed-source technologies where needed
- Need to update to Visual Editor!
- Making editing easier for everyone
- Failure to lower barriers to participation; using technology to deliver our mission efficiently
- An increasing number of people are accessing Wikipedia from their phones.

By the range and quality of responses, this is clearly an area requiring attention in order to improve quality and extend reach. The Strategic Plan should have a technical section, setting out WMUK's major technical objectives as well as the part to be played in global developments.

3.10   Political change
- WMUK is a-political, so for political change to influence us it would have to be through legislation. Acts similar to SOPA in the US would be problematic.
- Restrictions of web content / increase in censorship
- Open Government agenda
- Changes in government can mean swings in attitudes that need to be minimised. Need to build up cross-party consensus.

The policy of UK government with regard to open access, copyright and censorship is an important area. What should WMUK's strategy contain to deal with political change? A number of interviews raised the question of how politically active WMUK should be? How freely should it campaign in comparison with other UK charities and other WM Chapters? There is much at stake over this Government and the next.

3.11   Economic or financial change

A number of responses addressed the issue of WMF and non-WMF fund-raising.

- What if WMF withdraw support and funding from Chapters?
- Or if we aren't allowed back in the fundraiser?

Or more generally in relation to funding:

- Seeking out non-WMF source of funding in the present economic environment would be a challenge
- What if there is a drop off in income from donors, or our grant from WMF being reduced?
- With such a large number of readers in the UK and a persistent fundraiser every year, economic financial change that effects the whole country would have less of an impact on the charity.
- Partner organisations may have less money to cooperate - continuing recession could affect our partner institutions seriously and our fundraising ability.
- However, we are learning that we don't need to operate on a small budget anymore

In General:

- Harder times economically mean it will be harder for volunteers to commit
- Rise of new major economies - China, India, etc.

Once the Strategic Plan has been agreed, a funding plan will be necessary to match the Plan's requirements. Many of the above issues will be reflected in that funding plan, including the avoidance and mitigation of funding risks.

What are the risks and threats to WMUK over the coming years?

Points are listed in order of frequency of response

3.12   Threats to Identity and Existence

- WMF revoking our chapter status/Major crisis leads to Foundation taking away our status
- If the Foundation pull the plug on the chapter (or chapters generally)

- Internal arguments/if we suffer a crisis of confidence and leadership
- The resistance to move forward and to keep a club house mentality.
- Successful attempt by its vocal critics to hurt the organisation.
- Delay in Athena launch.
- Drifting away from the mission. The current board is closing down transparency and openness in reaction, rather than focussing on the core values.
- Charity Commission removing charity status?

3.13   Threats to Reputation

- Board unstable, renewed trustee issues
- Rogue representatives of Wikimedia (we need to have a clear voice and messenger)
- Any more controversy related to board members, staff or well-known volunteers.
- More stories like the issues over conflicts of interests.
- People will always be a risk, particularly in a creative and innovative environment.
- Conflicts of interest
- A serious reputational issue involving one or more of our outreach projects

3.14   Threats to Performance

- Not recruiting enough volunteers
- Decision making process
- Staff satisfaction/motivation.
- Competence of senior management in basic management functions - procurement, reporting, risk management, planning.
- Failing to measure impact effectively
- Not getting a five year plan sorted out
- Unclear goals
- Inability to delegate to staff

3.15   Threats to Income

- Relationship with WMF not being able to be repaired or arguments with the foundation
- An unfavourable decision by the WMF Funds Dissemination Committee.
- Further upheaval in global financial climate.
- Inability to manage relationships.
- Our continued ability to justify our impact.
- Another trustee disaster
- Fundraiser stops being successful
- Loss of reputation
- Membership dwindling

3.16   Threats to Projects and Activities

- Decline in volunteer base
- Replacing volunteers with employees; lack of interest of personnel to support and deliver projects on behalf of volunteers.
- Trying to do more than we can with the resources at hand.
- Not getting a five year plan sorted out!
- Not enough staff/volunteers

3.17   Discussion

The perceived threats and risks are very similar to those in the current Risk Register. The two major themes of substantially increasing the volunteer base and their engagement (and differences about how to achieve that), and mending/managing relationships with the Foundation are shown again.

Also many people are keen to put Board troubles behind them, and to move to a point where good plans lead to timely decisions and to actions well delegated and well reported.

SECTION 4: WHAT'S SPECIAL ABOUT WMUK AND WHAT'S OUR VISION, AMBITION?

This Section is reported largely verbatim, so that the actual words used can be crafted into statements about WMUK and where it is going.

4.1   What is unique about WMUK? Why should people and funders support us?

Comments reproduced here in full, in the order made

- It is a fantastic organisation that helps to break down barriers and walls to knowledge. People should fund it because it is the only organisation helping to push the ideals that knowledge for one and all should be a right of every person.
- Our activities are carried out in a very open environment with not just our successes but also failures for the world to see.
- Not too sure about this one yet, but WMUK can probably be(come) the European "face" of English Wikipedia, which is the most popular non-commercial English language website in Europe.
- We happen to be lucky and people confuse us with Wikipedia. There is little more that is unique in terms of mission, skill or experience. We could easily disappear within 3 years using the current strategy.
- We're the only Wikimedia charity in the UK - we work with a remarkably deep and passionate community, and our work can have a remarkable impact thanks to the scale of Wikipedia and its sister sites.
- We are the biggest *charity* in the UK supporting Wikipedia and we have a volunteer community behind us
- In a word Wikipedia. It is free, balanced and not in the pocket of any government or company. Its mission, to promote the websites on the ground, is important and exciting.
- Because we are committed to sharing free and open knowledge for the benefit of everyone. Because our projects are unique in scope and ambition. Because Wikipedia is the largest reference work ever created. Because they believe in our mission and values. Because we demonstrate good value for money.
- We are here to deliver the Wikimedia mission in a way that is appreciative/celebrates UK history, culture and the involvement of UK based individuals in all aspects of our work. WMF is not set up to achieve this to the same level of quality, and we are having real and appreciable impact with bringing UK institutions and people into the Wikimedia mission with roles like Wikimedians in Residence, Train the Trainers and Education and GLAM activities.
- It could be argued that internationally WMUK isn't unique as it's part of a community. What makes it unique within the UK is its access to a group of volunteers who write one of the busiest websites in the world. Wikipedia is enormously influential, meaning we should be attracting donors and that people should be eager to work with us.

4.2   What is your vision for WMUK in 2018?

All comments are included here:

- I want WMUK to help bring expertise and new content into Wikipedia, to be at the centre of a thriving programme that demystifies the Wikimedia projects. In short I want us to be making a significant contribution to the Wikimedia vision of bringing free knowledge to the world.
- We will be the key organisation in the UK supporting Free Knowledge for All
- We will be a model WM Chapter from which other Chapters can learn, having grown through the teething pains of the governance review.
- I'd like to see WMUK as active and well-organised as for example our German colleagues.
- We will no longer exist as WMUK, we will have merged into a much larger and EU wide initiative for the preservation of open knowledge and cultural access.
- We will have much bigger capacity - a larger staff meaning we could support more volunteers and take on more projects.
- Evolve Wikipedia beyond text into an even richer medium of information, learning and communication.
- A sensible educational charity that runs like any other charity. No governance issues, trustees maintaining an official (and polite) tone in all conversations. No grandstanding. Staff being trusted to lead a wide-ranging programme which volunteers thoroughly enjoy.
- We will have our own home base, open to volunteers with a constant programme of activities throughout the UK
- To have facilitated the creation of an open access UK cultural information network/hub, linking all major institutions.
- Seen as indispensable by the community in the UK and internationally. Representative of the UK population, especially in terms of gender.
- To be known as a major player in education and GLAM (Galleries, Libraries and Museums sector).
- Active groups of community wikipedians in every neighbourhood
- To have more and more engaged volunteers – 500 active, happy and creative volunteers by 2018 (compared with 100 now)
- To be the first port of call for any media and opinion formers, represented on committees and institutions at the heart of Whitehall , Westminster and the EU.
- To be a beacon on the Digital Engagement landscape
- To quadruple the UK editor community and blow open the demographic – all ages, genders, classes, cultures, languages
- To be stable, strong, credible. To be inclusive in our projects and our work.
- Our programmatic work to expand dramatically and the impact to be noticeable in terms of geographic reach - regular, well attended events across the UK rather than in pockets, supported by devolved funding.
- We will have 40+ Wikimedians in Residence, funded and delivered in a range of different ways.
- Deliver Wikimania 2014 so well that it becomes a springboard to a whole new level of recognition, reputation and engagement.

4.3   Ambition and appetite

The survey asked for an indication of what scale of increase the next 5 years should bring. It is clear that Board and staff see the next five years as one of significant growth – the majority want an over 50% increase in :

- Donors & income
- Volunteers (up to 500% more! From 100 to 500)
- Activities
- Influence

People have less appetite for comparable big growth in staff numbers - ref. the discussion about whether staff 'displace' volunteers, or are needed to engage and support larger numbers of volunteers.

A number of respondents thought the maximum 50%+ column was set too low - that by 2018 many aspects of WMUK would have grown beyond that – up to a doubling of size?

The following chart shows the percentage of respondents who ticked the 50%+ box on the 6 dimensions.

How ambitious should WMUK be?

Board and staff members were asked what % growth they want to see in different aspects of the organisation. What proportion wanted to see growth of 50% or more in five years?

% Board and staff wanting 50% + in 5 years

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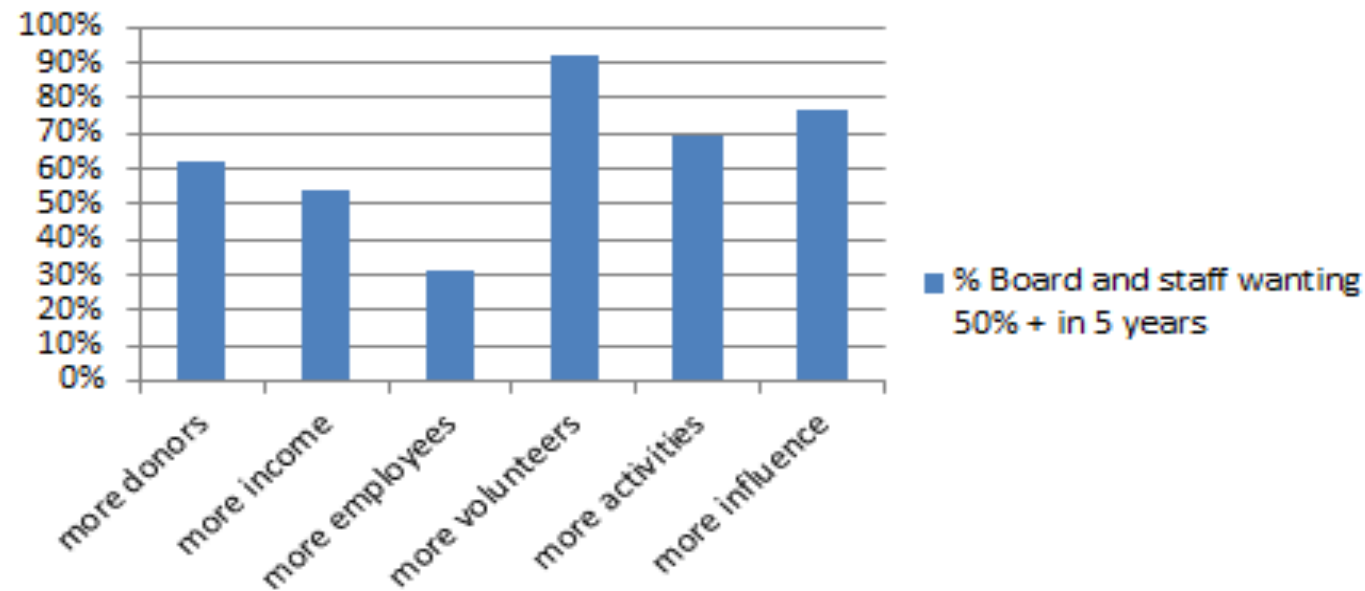
SECTION 5: STRATEGIC PRIORITIES 2013-2018

Responses grouped under headings, ranked to reflect the numbers of responses

5.1   Increase volunteer participation

- Growth of Volunteer base x 5
- Build a strong active volunteer base
- Focus outside London and Manchester - we have almost no contacts in Northern Ireland.
- Organic growth of volunteer network.
- Create greater diversity in our editor and volunteer base
- Expand members and volunteer base

5.2   Achieve good governance

- Board maturing into an advisory/strategic capacity, with no more than six meetings per year
- Strong governance
- Deliver a stable Trustee board which acts effectively for the charity in line with our movements values
- Improve governance to repair damage and improve reputation
- Complete Governance review actions – within one-two years

5.3   Strengthen management

- Credible senior management team
- Build management practice at many levels and, where necessary, structures
- Transparent and accountable programme management
- Succession planning for CEO

5.4   Build effective staff team

- Have a happy and confident staff team that works closely and in harmony with the community

- Ensure staff capacity meets the requirements of all our projects
- Create a core staff team that seeks to empower volunteers to deliver operational work in partnership with them

5.5 Decentralize WMUK to improve the approach to Wales, Scotland, Ireland, and English regions

- Expanding our coverage into other languages eg Welsh, Scots, Manx
- Expand activities into other areas of the country

5.6 Increase and professionalise relationships with key Education/GLAM institutions

- Have firm relationships with leading GLAM institutions (already in progress)
- Menu of levels and types of partnerships
- Most universities aware
- Most major cultural institutions aware

5.7 Deliver successful events

- Wikimania 2014 – especially important, if we get it
- GLAM WIKI
- Deliver more 'real world' events that impact on the projects in terms of content
- Ongoing (yearly?) conferences which are known throughout the field
- Ongoing (yearly?) competitions and grants which the Wikipedia Community know and use

5.8 Be financially secure and sustaining

- Diversify sources of income

5.9 Reverse the decline in editors

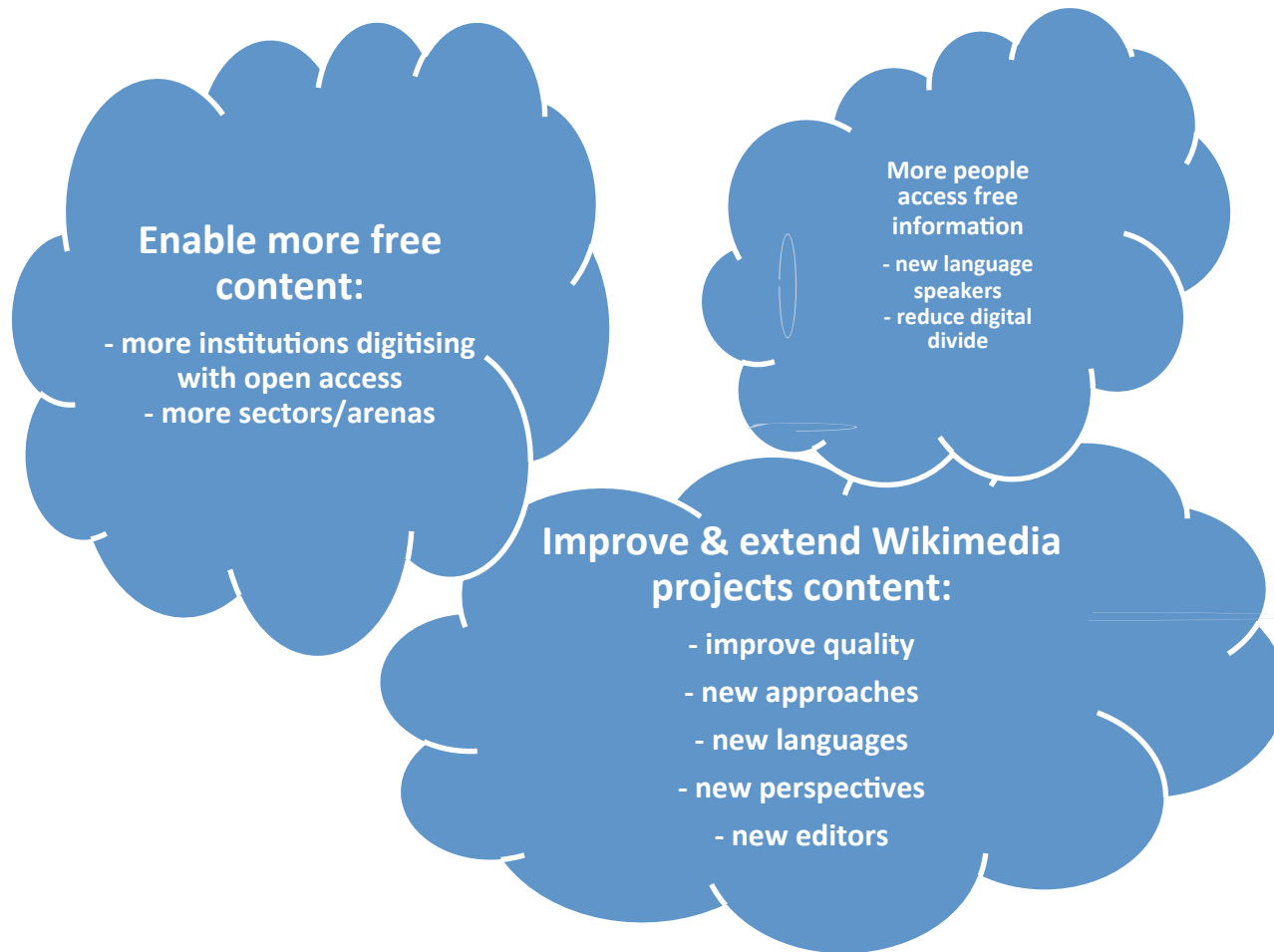- Recruit more new editors and evidence their impact on the projects

SECTION 6: ANALYSIS & FINDINGS - PULLING TOGETHER PRIORITIES FROM THROUGHOUT THIS PAPER

6.1   Strategic objectives

The predominance of priorities identified in the survey that are essentially means not ends (or at least intermediate outcomes, not final ones) reveals a block in strategic thinking among Board and staff. If all the above were achieved where would it get WMUK? What would the outcomes and impact be in the 'real world'? If this is not included in the strategy, WMUK's work is just engaging people and doing stuff.

The WMUK mission requires some expansion into strategic objectives and as a starter for discussion this report suggests the following graphic - is this the impact you are trying to achieve? If not this then what?

Enable more free content:

- more institutions digitising with open access
- more sectors/arenas

More people access free information

- new language speakers
- reduce digital divide

Improve & extend Wikimedia projects content:

- improve quality
- new approaches
- new languages
- new perspectives
- new editors

If these objectives or something similar were agreed, it would be possible to set targets:

- How many WMUK partners, perhaps identified under a two/three tier menu?
- How many institutions digitising with open access? and in which arenas or sectors?
- How many gigabytes of new open access information?

- How many new editors UK based?
- How much content added or revised to Wikimedia projects by UK based editors, new and established?
- How many new language pages added in priority languages - e.g. Welsh, Gaelic, Scots, Bengali, Somali?
- How many new readers from priority groups?
- What feedback on quality?

Exact metrics may not be possible on all these questions, but if the scale of WMUK's ambition in relation to these objectives were expressed somehow, it would then focus and prioritise WMUK's activity –

- Which partnerships and how many? What form of partnership?
- What could be achieved in a given sector/arena, and what role should WMUK play?
- Which volunteers, where, and how many, with what skills or interests?
- Which editors, how many and with what knowledge or languages, or interests?
- How much money to invest?
- Which events, where, with what focus?
- How many WiR and where? How much should WMUK invest?
- How much training? How many trainers to train?

For example, entering a range of work with secondary school pupils and institutions is intuitively attractive in terms of WMUK being an 'educational charity' – but what would be the measurable results? New young editors and volunteers? Usage of MOOCs? New campaigns? New content on-line?

Another example is thinking through the desired outcomes for Wikimania 2014? This will be a major commitment if it comes through but also the chance to make a breakthrough for WMUK. What differences would it make - not just for volunteers and reputation – but also for open-access digitisation, Wikimedia Projects, and the readership?

6.2   Extend the partnership arenas and be a more strategic, systematic partner

WMUK has prioritised the GLAM and HE sectors for over two years but even during that time has also worked in the fields of science, medicine and history. A number of other suggestions were made in the course of the consultation:

- The community sector – local history societies, community centres, community action groups of all kinds
- Secondary schools – teachers and pupils
- Young people – especially socially excluded young people,

Better management of partner relationships - databases, communications, prioritising, evaluating – was also seen as essential by many. It would be a step forward to have a simple means of defining a menu of ways in which organisations can partner with WMUK – what is involved, what the outputs and outcomes might be. Then existing and potential partners could be grouped accordingly and priorities set for the coming year(s). Flexibility and responsiveness is of course valuable, when organisations approach WMUK, but a degree of steering is also essential and enables an evaluation of partnership work.

6.3   Influencing the legal and policy environment in Europe and UK on copyright and open access

Board and staff largely share the view that there is a gradual sea change happening where institutions are starting to be convinced of the value of open licensing. Governments are also moving - or considering it. This move towards digitisation, and the greater awareness of the possibilities and benefits of creative commons licensing presents WMUK with a significant opportunity to exercise influence towards its mission. WMUK has an established position and set of partners.

Many of those taking part in the consultation believe policy work and campaigning should be an essential component in the Strategic Plan – though they recognise the reluctance of some Board members to campaign or get too involved in party politics.

6.4   Increase the WMUK volunteer force

Throughout the consultation, the issue which received the greatest attention and support was the need to significantly increase the number of active volunteers:

- From 100 to 500 in 5 years
- Spread around the UK
- Delivering activities and acting as links with partners
- Invigorating the WM movement in the UK

There are however differences about how best to find, engage and support volunteers:

- What is the role of staff in engaging and supporting volunteers?
- What are the relative roles of volunteers and staff in delivering activities?
- Essential to bring volunteers together into groups – geographically or by are of interest

Some of these issues are about beliefs and values about what WMUK is. Rather than resolve these differences by discussion, or vote, a better way forward is to see the years 2013-2015 as a trial period. Let different models be tested out and their effectiveness monitored – and on that basis invest significantly in the best ways of creating and supporting volunteers to deliver the effort and results needed.

> It became clear in talking to Board and staff that the rights, roles and responsibilities of volunteers, members, supporters, donors, editors, partners – and Board and staff too – need to be clarified, and the interactions between them too. This will enable for example better communication with them all. It might be that some definitions may need amending, and connecting.
>
> Better management of relationships - databases, communications, prioritising, evaluating – was also seen as essential by many.
>
> Although not a strategic planning issue in itself, it will support many aspects of the strategy.

6.5   Achieve good governance

The second issue which drew almost unanimous attention was that of completing the Governance Review action plans and establishing excellent governance systems and practice.

Interviews flagged up the following issues, many of them already known to everyone:

- Timely and effective decision-making
- Avoiding micro-management
- Positive tone of communications around the Board

- Avoiding excessive e-mail volume as part of managing the trustees' workload
- Establishing good Board processes and conventions – ways of raising or dealing with proposals, staying on the strategic level, progress reviews, working with CEO and staff.

The prize is clear to all too:

- More effective WMUK
- Repair fences with Foundation
- Re-establish reputation
- Staff motivation

6.6   Strengthen management

A number of points are made about building management capacity

- Currently CEO is the only post with explicit management responsibilities although all staff manage budgets, programmes, projects. As more staff are recruited, questions arise about how to agree priorities, maintain performance etc. it may well be necessary to plan for the
- Build management practice at many levels and, where necessary, structures

Many comments were made about the need for better – i.e. more transparent and accountable - programme management. Board members are looking for reassurance on how to judge the success of work-strands and their main component parts – and staff remarked that there seems to be no link between the time and money Board spend on things and the value of their outcomes.
As a relatively new organisation, the cycle of planning, budgeting, delivering programmes and monitoring outcomes are still in a formative stage. Further iterations should improve practice. How much detail to include? Are plans agreed as a whole? In large chunks? Or detail by detail?
Current year (proposed) activity plan lists strands of work and in a sense gives priority by the amount of budget to be allocated. Responsibilities are very clear but success criteria are not – and a link to strategic objectives (see discussion above) would give it greater coherence.

With a small team there is a significant potential loss of knowledge when someone leaves. Succession planning for the CEO post would be advisable during 2013/14. This is a positive step which might extend to other posts too.

6.7   Build an effective staff team

The vast majority of comments about the current staff team were positive. Going forward the following suggestions were made:

- Have a happy and confident staff team that works closely and in harmony with the community
- Ensure staff capacity meets the requirements of all our projects
- Create a core staff team that seeks to empower volunteers to deliver operational work in partnership with them
- Empower staff so that they do not need to ask permission for every action but can use initiative in confident way
- Build staff capacity around England and UK
- Operate from a branded shop-front base that volunteers and partners access regularly, to reflect an open door.

6.8   Projects & Events

This topic falls slightly below the strategic planning agenda – staff and Board all look forward to a stream of high quality events and projects that support the mission and strategic objectives. Two which drew particular comments were:

i.   Wikitowns

Those who raised the issue of Monmouthpedia spoke of it as an excellent pilot, and a real achievement for WMUK as an innovator. They recognised however that the Foundation had called time on the model used and the use of the brand. A lower-cost, more DIY version for villages towns and cities would be a valid line of activity for WMUK they thought, although communities and local authorities might do their own thing without WMUK.

ii.   Wikipedians in residence

Many people spoke positively about WiR, as high profile developments of partnership between WMUK and major cultural organisations, and as excellent ways to build engagement. Costs are an issue and an expansion in the numbers of WiR could not be sustained by some of the existing models relying heavily on WMUK funding. Temporary posts or rotating individuals might be the way forward and some people looked forward to numbers of WiR positions moving towards 40-50.

Innovation

Many expressed the view that the programme of events and projects should continue to innovate, for example, bringing together communities of researchers, or offering fellowships.

Delivering successful events

- Wikimania 2014 – most important strategically
- such as GLAM WIKI
- Deliver more 'real world' events that impact on the projects in terms of content
- Ongoing (yearly?) conferences which are known throughout the field
- Ongoing (yearly?) competitions and grants which the Wikipedia Community know and use
- Small events that find and recruit new editors
- Fun events for volunteers so that they enjoy their time with WMUK

6.9   Technical developments

Having agreed that WMUK has made some good technical steps forward, a number of people look ahead to see further development:

- A sub-committee review and recommendations e.g. a business case to launch significant software development to 2018 (e.g. MOOCs) and a look at WMUK strengths and opportunities
- Continue to support Toolserver, Europeana mass upload tool and longer term contribute to the development of Wikimedia Labs
- How to ensure enough technical knowledge in-house – e.g. to manage the two consultants?
- Can WMUK help pilot new approaches to knowledge and information as presented on the WM Projects – could women and/or young people be attracted by richer media, greater dialogue, or is the format 'stuck' on text and the occasional still?

6.10   Rebuild reputation
Given the concerns expressed about damage to WMUK reputation in the past year or so, the communications plan growing out of the five year strategic plan should focus strongly on rebuilding that reputation, by for example:

- Communicate the rehabilitation with Foundation and benefits of actions from Governance Review
- Wikimania 2014 to become a big success

- Feature more positive events like presentation to Women of the World March 2013.
- Promote the larger volunteer community who are positive and active to partners and potential new volunteers
- Secure coverage of success stories such as welsh language developments

6.11 WMUK - international dimension

There are three aspects to WMUK's future as part of the global Wikimedia movement.

(A) Re-establishing WMUK's reputation and full status with the Foundation

The agenda for this is clear to Board and staff.

(B) Supporting and contributing to Chapter initiatives

Currently there are four items in 2013 Activity Plan which reflect WMUK's identity as a Chapter

- International Wikimedia movement grant
- Toolserver
- Europeana mass upload tool project
- Wikimedia Chapters Association

It is acknowledged that the success of these projects and activities will depend on how Chapters work together and the ability of certain Chapters, including WMUK to lead the way. The strategic plan should express WMUK's objectives in relation to the Chapters, especially those in Europe.

(C) Linking WMUK's Strategic Priorities with those of the Foundation

The Foundation's Strategic Priorities are broadly reflected in those of WMUK, as set out below.

Stabilize infrastructure: WMUK will improve our technology, build support among institutions, policy-makers and donors, strengthen our governance, management and workforce

Increase participation: WMUK will increase volunteers, support networks and groups, encourage diversity, enable new editors

Improve quality: WMUK will network with more institutions of culture, learning and science, support editor community to increase and diversify

Increase reach: de-centralize WMUK to better engage with Scotland, Wales, and English Regions; support new language contributions

Encourage innovation: WMUK will organise meetings and events for developers and researchers; explore social and technical solutions with volunteers, recognise achievement.

The above list will need to be finalised once the WMUK strategy has been completed.