

Introduction to the process of strategy making

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Preliminary remarks



- This is not an extensive guideline
- We just want to share our own experiences
- And provide a kick-off for the discussion

Why design a strategy?



- To develop a common view for the future
- To provide continuity & stability
- For your members & for the community, for your staff and for your partners
- Framework for annual plans and FDC application

The first steps



- Discuss necessity and scope within your board
- Search examples that are comparable with your needs and/or wishes
- Act as if it is an official process (it should be managed): appoint a project leader, write down the steps to be taken
- Conduct analysis: scan environment 360°, compose a SWOT

What should be in it



- Think of the different areas that you have to cover and formulate goals

<https://se.wikimedia.org/wiki/Strategi/en>

- Consider what's in the strategy and what's in the annual plan, e.g. goals can be more specific in the annual plan

https://meta.wikimedia.org/wiki/Grants:APG/Proposals/2015-2016_round1/Wikimedia_Sverige/Proposal_form

How to involve the community



- This is a key point: your members play a decisive role in strategy making: organize feedback sessions (in person, online)
- Clearly separate feedback sessions from decision making session
- Final acceptance in general meeting to make it an official document

Questions for discussion



- **Was it hard to design a strategy?**
- Who took the lead at your affiliate?
- How did you inform your members?
- **Did you involve the broader community?**
- **What did you actually do with your strategy?**
- For how long is your strategy valid (one year, x years)?
- Have you refined/improved the strategy one or more times?
- **What is the value of the strategy?**
- Do you have a long term vision?
- **What would you recommend to others?**

Hands-on part



- Write down your own ideal *process* or the improvements that you want to make for your chapter, including: sources for content, who to approach, participants, planning / timeline.

Learn from other affiliates



● Examples

–**Sweden:** <https://se.wikimedia.org/wiki/Strategi/en>

–**Netherlands:** [https://nl.wikimedia.org/wiki/Bestand:WMNL Strategy 2013-2015_english.pdf](https://nl.wikimedia.org/wiki/Bestand:WMNL_Strategy_2013-2015_english.pdf)

–**France:** [https://meta.wikimedia.org/wiki/Grants:APG/Proposals/2013-2014_round2/Wikim%C3%A9dia France/Proposal form/Strategic plan](https://meta.wikimedia.org/wiki/Grants:APG/Proposals/2013-2014_round2/Wikim%C3%A9dia_France/Proposal_form/Strategic_plan)

–**Germany:**

[https://meta.wikimedia.org/w/index.php?title=Kompass 2020/en&uselang=en](https://meta.wikimedia.org/w/index.php?title=Kompass_2020/en&uselang=en)

–Find out more about **other chapters:**

https://meta.wikimedia.org/wiki/Wikimedia_movement_affiliates