

Reap the benefits of strategic planning

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Strategies

or:

Who am I, where am I, and what am I
doing here?

Strategic planning steps



- Step 1 - Situation analysis
- Step 2 - Core organizational values
- Step 3 - Vision statement
- Step 4 – Mission statement
- Step 5 - Strategic goals
- Step 6 - Organizational capacity and potential
- Step 7 - Strategic objectives
- Step 8 - Strategies
- Step 9 - Activities
- Step 10 - Indicators and means of verifying indicators
- Step 11 – Planning
- Step 12 - Budgeting

- Why bother?

What is a strategy?



Strategy is a high level plan to achieve one or more goals under conditions of uncertainty. (Wikipedia)

A method or plan chosen to bring about a desired future, such as achievement of a goal or solution to a problem.

<http://www.businessdictionary.com>

Characteristics of a strategy



- multi-year
- contains a vision and mission
- based on an analysis of organisation and environment
- identifies goals as well as objectives - not so much targets and activities
- based on a theory of change

A theory of change



- a theoretical pathway of **action steps**
- that direct your mission and programming activities **toward change**
- through **logical cause and effect** relationships.

A strategy means:



- stop doing the fun things
- saying no to people - and to yourself

Strategy is a way to promote strategic thinking



- knowing the organization's purpose,
- understanding the situation
- knowing what to do and why it needs to be done,
- always questioning whether the right thing is being done

Types of strategy



- **operational excellence**: provide ‘products’ in the best way
- **customer intimacy** : delivering what specific customers want.
- **product leadership**: innovation, state of the art products, applying new technology and ideas

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Mission and vision



Vision: the goals and desired middle to long-term future state of the organization

Mission: the reason of existence and identity of the organization and the (customer) needs the organizations aims to meet

Wikimedia Nederland



Vision:

- a world in which every single human being can freely share in the sum of all knowledge.

Mission

- Wikimedia Nederland, as part of a global movement, provides an environment where volunteers and organisations can work together to collect and distribute free knowledge throughout the world.

Goals, objectives, targets...



- 1. Goals:** clear statements of the **overall purpose** of your program or organization
- 2. An objective** is a **small component of a goal**.
- 3. Targets** attach a **number** to the program's goals and state expectations
- 4. Output:** direct and measurable **products** of program activities and participation.

- goal : to have more women edit Wikipedia
- objective: to organise a series of editor trainings specifically aimed at women
- target: in the next 2 years at least 6 trainings organized, attended by at least 50 women
- output: 5 training events organised, 65 women attended, 15 still active after 6 months
-

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SWOT ANALYSIS



Strengths

- The capacity to develop appealing activities.
- Sound collaboration with active and knowledgeable volunteers.
- Robust back office and knowledgeable staff.
- Growing understanding of the make-up and motivation of editors, and of public appreciation for the Wikimedia projects.
- Trust from and good relations with WMF

Weaknesses

- Narrow base of active volunteers.
- Impossible to provide partners/financiers with guaranteed results on Wikipedia.
- Major financial dependence on WMF.
- Large-scale public fund-raising activities not possible without CBF certification
- Measurable impact of activities on Wikimedia projects disappointing

Opportunities

- The positive image of Wikipedia helps to open doors and set up new activities to benefit free knowledge.
- Interest in free knowledge is increasing.
- Willingness of funding bodies to support projects for Wikipedia.

Threats

- Financial contribution from WMF could be lowered.
- Some active editors on Wikimedia projects are negative about both WMF and WMNL

Strengths + opportunities. There is a chance - and you know what to do.

Weaknesses + threats. You don't have the skills to deal with the threats

Weakness + opportunity - There is an opportunity but you do not yet have the competency. Could be risky

Strength and threat- There is a risk, but you can deal with it

Confrontation matrix

		<i>Internal Factors</i>	
		<u>S</u> trengths	<u>W</u> eaknesses
External Factors	<u>O</u> pportunities	Internal Strengths Matched with External Opportunities 1. 2. 3. 4.	Internal Weaknesses Matched with External Opportunities 1. 2. 3. 4.
	<u>T</u> hreats	Internal Strengths Matched with External Threats 1. 2. 3. 4.	Internal Weaknesses Matched with External Threats 1. 2. 3. 4.

Confrontation matrix WMNL		Opportunities			Threats	
		Positive image of WP helps in setting up new activities	Interest in free knowledge is increasing	Willingness of funders to support WP projects	Financial contribution from WMF could be reduced	Some active editors are negative about WMF and WMNL
Strengths	Capacity to develop appealing activities	1	1	5	1	
	active and knowledgeable volunteers	5		1		
	Growing understanding of /insight in the editor group	3				5
Weaknesses	Major financial dependence on WMF					3
	Impossible to guarantee results on Wikipedia to partners/financiers		3	3	5	
	Narrow base of active volunteers		5		3	1

Goals



- What am I going to do?
- Also do a SWOT for free knowledge/Wikipedia in your country/region

Strengths

- .Community of very loyal and knowledgeable editors.
- The editors are constantly developing new activities and projects to improve content.
- Large number of articles.
- editors active internationally in multiple languages.

Weaknesses

- no guarantees that the users are able to manage the entire range of knowledge adequately.
- implementing innovation is difficult.
- conflict management requires improvement.
- Technology and appearance outdated.
- Procedures for recruiting and retaining new editors are not optimal.

Opportunities

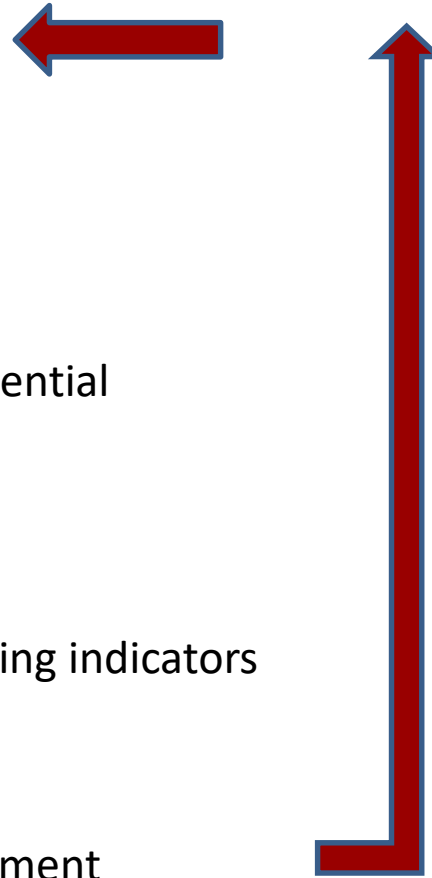
- . Willingness to contribute is potentially high in Dutch society.
- Institutions willing to share knowledge, contribute content and work together.
- Acceptance in the academic world is growing.
- Technological developments in MediaWiki at the international level.
- Strong reputation among large sections of the population.

Threats

- Higher reader expectations.
- Mobile makes it more difficult to contribute.
- Providing factual neutral information unpopular

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- Step 13: Monitoring, evaluation, adjustment



Why bother?



Why do strategic planning?



- It helps organizations have good governance/leadership.
- It creates a sense of ownership
- It allows organizations to distinguish themselves from other groups doing similar work.
- It helps avoid competition and enhances opportunities for partnership with other organizations.
- It provides others with a clear idea of what the organization does.
- It is good for beneficiaries.
- It encourages support from donors and other organizations.
- It helps organizations develop policies. It helps in identifying goals, missions, and visions for the organization
- It gives organizations greater status and integrity.
- It helps organizations be focused and transparent.
- It helps in the evaluation of time and work
- It promotes a commitment to good results
- It allows organizations to be proactive rather than reactive.

When should an organization do strategic planning?



- When starting an organization
- When the priorities, mission, and vision have changed
- When external factors negatively impact the organization
- When an organization needs to be more focused

Once you have the strategy - what changes?



- Basis for
 - annual planning
 - fundraising
 - board development
 - staff planning
 - communications and publicity
 - partnership development
- ensures consistency through all these processes

Strategy and annual planning



- Objectives of the strategy become the goals of your annual plan
- goal : to have more women edit Wikipedia
- objective: to organise a series of editor trainings specifically aimed at women
- target: in the next 2 years at least 6 trainings organized, attended by at least 50 women
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Strategy

goal :

to have more women edit Wikipedia

objective:

to organise a series of editor trainings specifically aimed at women

target:

in the next 2 years at least 6 trainings organized, attended by at least 50 women

output:

5 training events organised, 65 women attended, 15 still active after 6 months

Annual Plan

goal:

to organise a series of editor trainings specifically aimed at women

Objective:

Organise three trainings attended by at least 20 women

Target:

20 women trained, 5 still editing

Activities:

Develop training programme
Develop training materials
Advertise event

How do you ensure that the strategy is not forgotten?



- make sure the document is accessible in a prominent place
- get it out
 - get it out when making a (annual) plan
 - when reporting on progress annual plan
 - when applying for funding
 - during general assembly
 - during board meetings
 - when on-boarding new board members, staff or volunteers

Do volunteers 'do' strategy?



- No, not really.
- Develop strategy in dialogue with community.
- In annual plan keep unallocated time/money/opportunities open to support 'non-strategic' volunteer initiatives

If you are thinking of developing a strategy



- Strategy is not just a formality – it is a different way of thinking and working
- Only do a strategy if you are committed to making use of it – or if you need to
- Participate in movement strategy process!
- Wait with finalising new strategy until WMF strategy has been decided

External links

- <https://meta.wikimedia.org/wiki/Strategy> - strategies of WM affiliates
- <https://meta.wikimedia.org/wiki/Grants:Evaluation/Glossary> - useful info on programming and planning
- https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2017 - Info regarding the movement strategy process
- http://www.thehealthcompass.org/sites/default/files/strengthening_tools/AllianceStrategicPlanningTool.pdf - useful information on how to set up a strategy process