



# Movement Strategy Final Report

williamsworks  
Phase 1 - September 2017

# OUTLINE

- Objectives, timeline & process
- What we learned
- A new strategic direction
- Next steps & recommendations

*This presentation and its recommendations were created by the williamsworks team; it draws on the past nine months of collaborative work that was done with a multidisciplinary (core & extended) strategy team at WMF, as well as with others from within the WM movement and outside experts.*

# Why create a movement strategy?

In 2001, Wikipedia started as an experiment enabled by what the internet was becoming at the time.

But the **world is changing**, rapidly. Wikimedia needs to adapt to where knowledge sharing is going, and it is part of a larger movement.

The role of the williamsworks team was to **help guide a discovery process to uncover the insights and opportunities** for Wikimedia to evolve in this changing world.

# What we set out to achieve

Our primary goal was to help identify **a strategic direction** for the Wikimedia movement that would **align and inspire** everyone on the path to 2030.

We were asked to help co-architect a process that would **build trust** within the movement by inviting participation from anyone and everyone.

And we were asked to maintain a **global view**, which required elevating voices from underrepresented regions like Africa, the Middle East, Asia and Latin America.

*Who do we  
want to be,  
and what  
are we  
trying to  
achieve  
together by  
2030?*

# What we did

Co-architected a movement-wide consultation process to inform the strategic direction, working with the core team and a steering committee of community members.

Facilitated 3 cycles of community discussion.

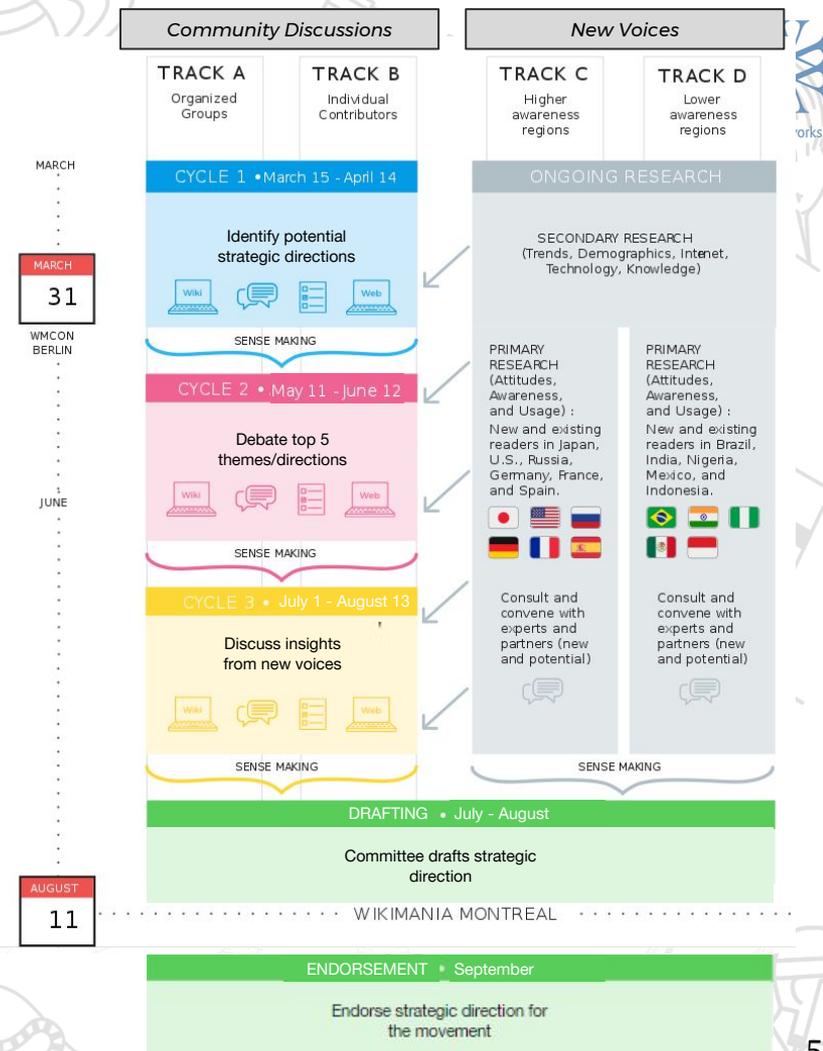
- More than 100 groups and communities held discussions
- Reps from 70 countries at WMCONF 2017 alone

Learned from new voices.

- Conversations with more than 300 experts globally (more than half from underrepresented regions)
- Research on readers across the globe, and trends in demographics, technology and more

Helped craft the strategic direction, working with the drafting committee & community members at Wikimania 2017.

Advised on community endorsement of the strategic direction & upcoming Phase 2.



# What we learned

## **Cycle 1** *Identify potential directions*

83 groups  
1,846 summary statements

Five themes emerged: (1) Community **health**, (2) innovation in **technology**, (3) **global** inclusivity, (4) **quality** content and (5) **partnerships** in education, GLAM, and beyond

## **Cycle 2** *Debate top 5 themes*

51 groups  
2,710 summary statements

- Inclusive, diverse, **healthy community** seen as most important theme, while the rest were close in importance overall
- **Nuances among subsets** (Track A talked more about global than tech; Africa and Asia mostly discussed partnerships)

## **New Voices** *Learn from those not yet included*

330+ experts  
16 salons and convenings

- Need **new ways to experience knowledge** beyond encyclopedia / knowledge = social
- **Future tech** could radically change how knowledge is created, processed & shared
- Should be **greater influence** in shaping world policy for access to knowledge

## **Cycle 3** *Discuss insights from new voices*

27 groups  
827 summary statements

- Keep encyclopedia model strong; add **other projects for new models of knowledge sharing**, and leverage **social media**
- Promote **oral history** as project if it can be verified
- Set **guidelines on reliable sources** to fight misinformation

## **Wikimania** *Review the draft direction*

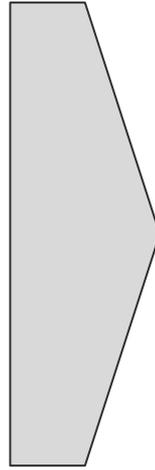
80+ people representing over 30 groups or communities

- General support, but still **trying to do everything**; vague language lacks boldness
- Take a greater stand for more **global participation** and **advocacy**
- Unclear how **individual contributors** can participate in this

# Cycle 1 summary

*What do we want to build or achieve together over the next 15 years?*

## TOP FIVE THEMES:



### Healthy, inclusive communities

By 2030, the Wikimedia volunteer culture will be fun, rewarding and inclusive for both existing contributors and newcomers.

### The augmented age

By 2030, the Wikimedia movement will actively use technological innovations to help volunteers be much more creative and productive.

### A truly global movement

By 2030, we will be a truly global movement. In particular, we will turn our attention toward regions we have not yet served well enough: Asia, the Middle East, Africa and Latin America.

### The most respected source of knowledge

We will work toward ever more accurate and verifiable content. By 2030, Wikimedia projects will be seen as the most high-quality, neutral, and relevant source of knowledge.

### Engaging the knowledge ecosystem

We will build relationships with a wide variety of organizations dedicated to the ideals of free knowledge. 7

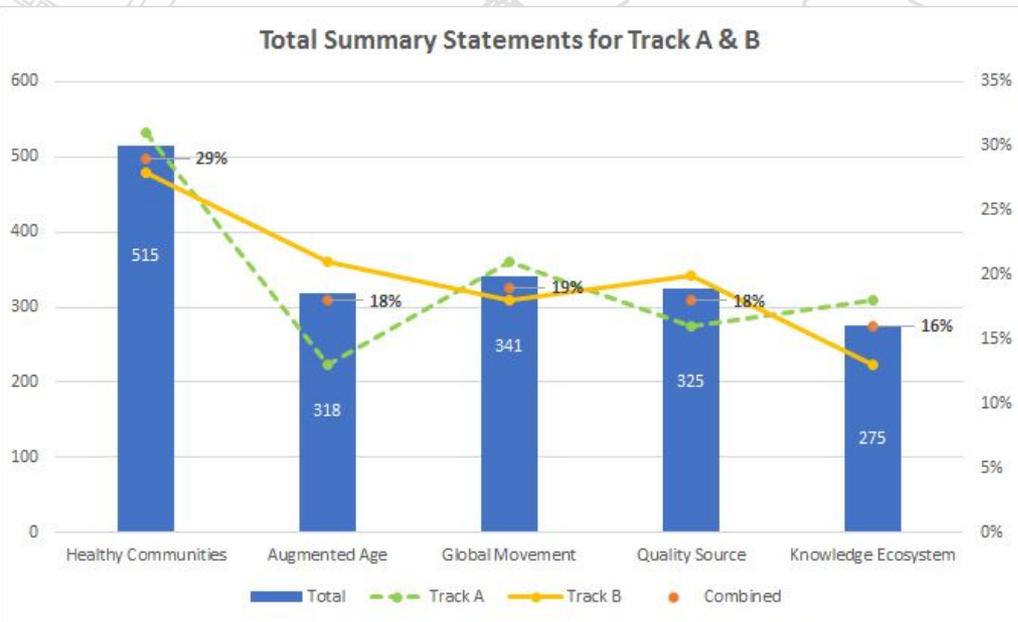
References categorized as 'other' were tagged with the top level theme, but did not cluster into any of the sub-themes

★ *Some comments were more relevant to feature requests, values and/or the means of achieving the direction.*

# Cycle 2 summary

Discuss the 5 core themes

Total Summary Statements for Track A & B



- 51 discussion groups, 2,710 summary statements
- 40% from Track A (groups), 60% from Track B (individuals)
- Results were adjusted to normalize the participation of WMF staff & the online survey (which together accounted for 36% of all responses)

## KEY TAKEAWAYS:

HEALTH

- **Critical precondition, most important of 5 themes**
- Inclusivity, diversity & representation are crucial
- Tools to limit abuse, discrimination & vandalism

TECH

- **Argument for other platforms (like social media)**
- Consensus is pro-AI and smart tools
- Multimedia & new non-text platforms are essential

GLOBAL

- **For new regions, we need new knowledge forms**
- Language and translation services/tools are vital
- Resources should be allocated with global priorities

QUALITY

- **Reliability & content quality are key to reputation**
- Engage experts to participate within open process
- Emphasis on standardization & citation guidelines

PARTNERS

- **Collaborator to advance partner orgs**
- Academia, schools & teachers are key pathways
- Partnership strategy for engaging new institutions

# New voices summary - Activities

*Learn from those not yet included*



8K

internet users surveyed in France, Germany, Japan, Russia, Spain, the UK and the U.S about Wikipedia attitudes, awareness and usage

124

people interviewed in Indonesia and Brazil about knowledge-sharing behaviors, building on prior research with 138 people in Nigeria and India

330

experts consulted, including through 7+ affiliate-led events

3

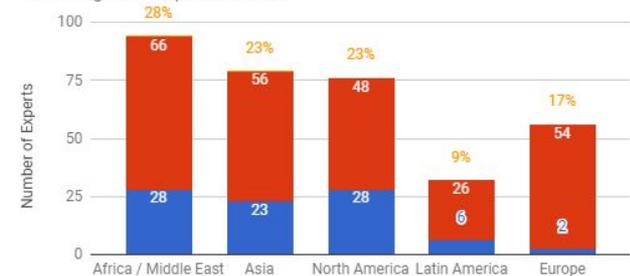
research briefs on trends in technology, misinformation and global demographics

*Some research is still forthcoming*

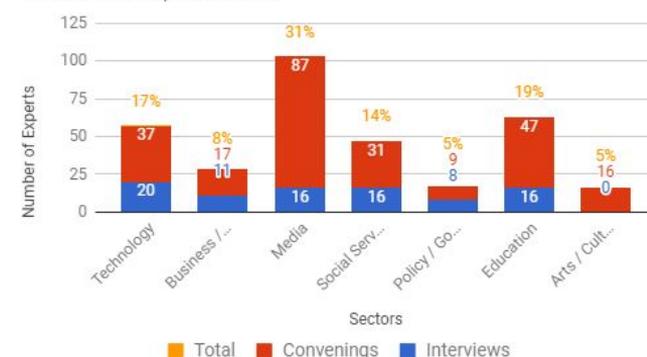
## EXPERTS SNAPSHOT

Track C: 39%, Track D: 61%

Total Regional Representation



Total Sector Representation



# New voices summary - Insights



Blogtrepreneur / CC by 2.0 (July 2016)

Knowledge sharing is **highly social**, especially for youth



Nickelbabe / CC0 (July 2014)

Wikimedia needs to think **beyond the encyclopedia** and expand to fit the needs of new users



JOSBORNE / CC0 (Dec 2015)

The existing Wikimedia **platform is limiting**



Lane Hartwell / CC by SA-3.0 (Oct 2009)

Perceived tension between **credibility and inclusivity**



Youngson / CC by SA-3.0 (Aug 2016)

Wikimedia should be more of an **advocate for free knowledge**



Amanda Paul / CC by SA-3.0 (Feb 2009)

Wikimedia is stronger when it **invests in partnerships**

# Cycle 3 summary

Discuss insights from new voices



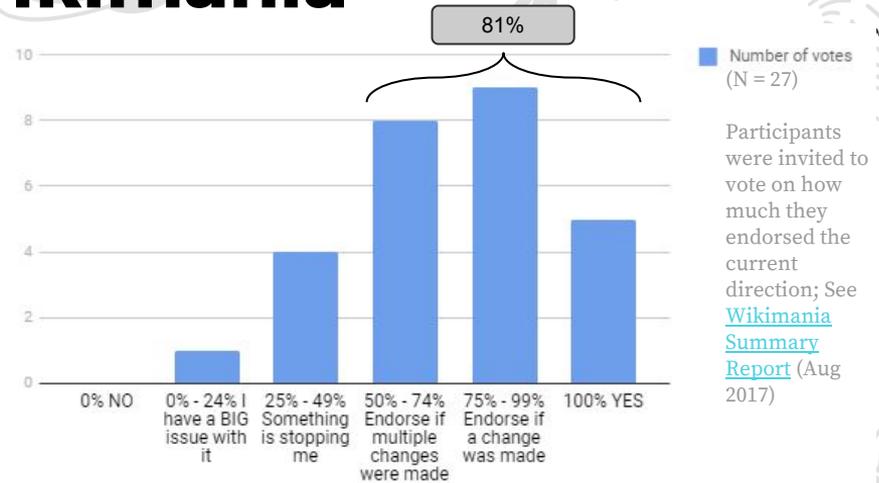
★ Indicates top points

Insights from new voices research	# groups, statements	Key Themes
#1: New ways of sharing knowledge beyond encyclopedia	31, 376	<ul style="list-style-type: none"><li>★ - Bolster current encyclopedia model with new <b>sister projects</b></li><li>★ - Create <b>social media functionality</b> or collaborate with existing platforms</li><li>- Develop new <b>technology</b> and products (search, Q&amp;A, chat, multimedia)</li></ul>
#2: Verifying new forms of knowledge	26, 154	<ul style="list-style-type: none"><li>★ - Establish best practices for classifying sources as <b>reliable</b></li><li>★ - Promote <b>oral history</b> as Wikimedia project if it can be verified</li><li>- Involve <b>experts</b> in the verification of sources</li></ul>
#3: Increasing misinformation	24, 137	<ul style="list-style-type: none"><li>- Create guidelines on reliable sources and make them more <b>accessible</b>.</li><li>- Stay current on fact-checking methodologies for <b>verifiability</b></li><li>- Better integrate <b>AI tools</b> to reinforce reliability of content</li></ul>
#4: Technology trends	15, 74	<ul style="list-style-type: none"><li>- Invest in new technological <b>features</b> (3D, VR, AR, translation)</li><li>- Enhance ability to edit and create content on <b>mobile</b> devices</li><li>- Pursue <b>partnerships</b> in tech sector to strengthen movement</li></ul>
#5: Population shifts	14, 86	<ul style="list-style-type: none"><li>- Attract <b>new users</b> through training and awareness campaigns</li><li>- Increase <b>representation</b> with respect to language and geography</li><li>- Engage new readers with <b>language pluralism</b> and translation</li></ul>

# Draft feedback from Wikimania



Strategy space participants showed **general support** for the draft direction presented at Wikimania



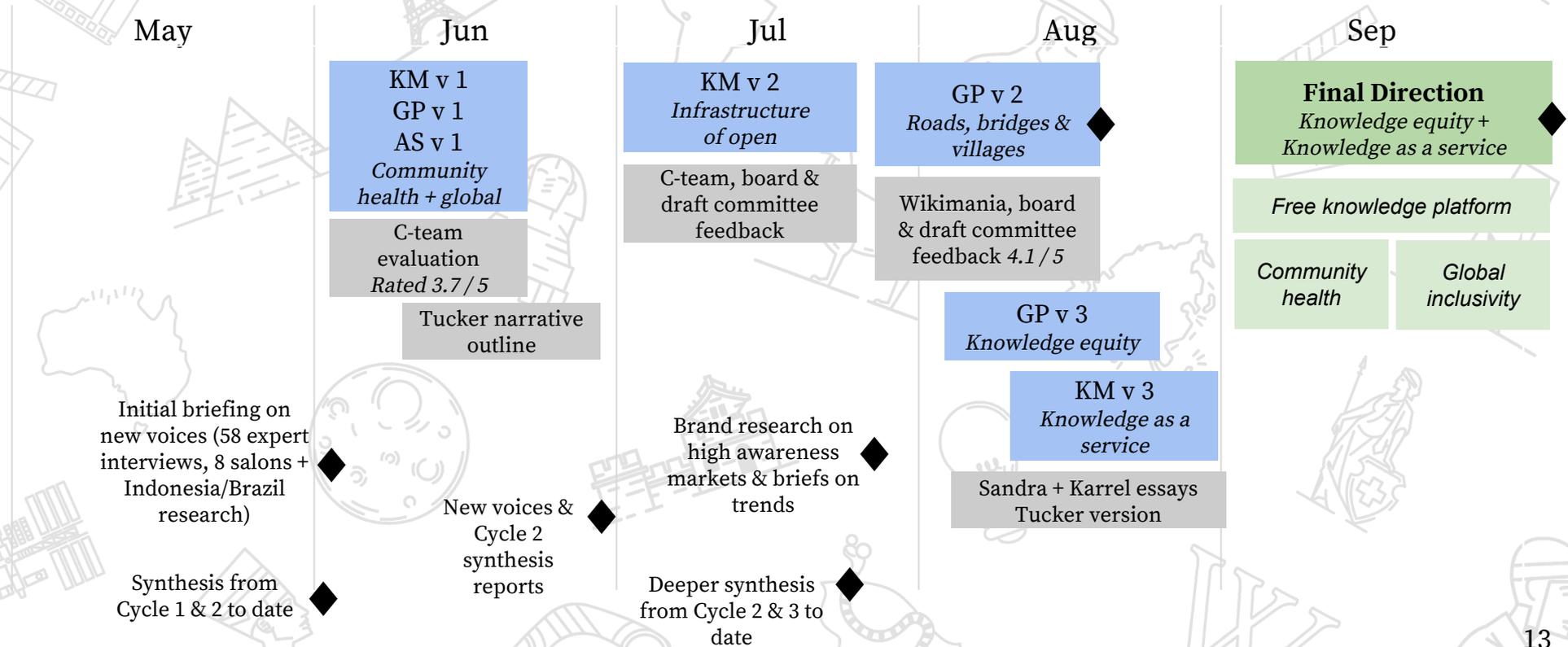
FEEDBACK:



- Still trying to do everything; vague language, lacks boldness
- Take a stand for **global participation** and **advocacy**
- Unclear how **individual contributors** can participate

# Our journey toward a strategic direction

The iterative process of drafting combined the efforts of many writers, contributors & editors.



# Strategic Direction: Service + Equity

By 2030, Wikimedia will become the essential infrastructure of the ecosystem of free knowledge, and anyone who shares our vision will be able to join us.

We, the Wikimedia communities and organizations, will advance our world by collecting knowledge that fully represents human diversity, and by building the services and structures that enable others to do the same.

We will carry on our mission of creating content as we have done in the past, and we will go further.

**Knowledge as a service:** To serve our users, we will evolve our underlying infrastructure to become a platform that serves open knowledge to the world across interfaces and communities. We will build tools for allies and partners to organize and exchange free knowledge beyond Wikimedia. Our infrastructure will enable us and others to collect and use different forms of free, trusted knowledge.

**Knowledge equity:** As a social movement, we will focus our efforts on the knowledge and communities that have been left out. We will welcome people from every background to build strong and diverse communities. We will break down the social, political, and technical barriers preventing people from accessing and contributing to free knowledge.

See [full version on Meta](#)

# Next steps

Phase 2 is about determining **how** best to achieve Wikimedia's 2030 vision and making org. & resource **commitments** towards those goals:

- (1) **Map competencies** that the movement has and the ones that still need to be developed to achieve the direction.
- (2) **Discuss roles and responsibilities** among the organizations in the movement to see which ones are best equipped and most interested in fulfilling the identified needs.
- (3) Each organization builds their own **3-5 year strategic plans**.

*For WMF:*

Define **economic logic** or how to generate the resources needed to fulfill its role in the new strategic direction.

Develop an integrated **product and programmatic strategy**.

Set **top goals / metrics** that will indicate success.

Make concrete **commitments**.

# Top observations & recommendations

## CHALLENGE

WM's structure (unconventional volunteer authorship model) and culture (independently minded contributors) is inherently resistant to traditional leadership.

While the WM culture is a proven system for building and growing projects like the encyclopedia, there is a serious limit to growth and opportunity beyond the encyclopedia without strong vision and leadership.

## SOLUTION

A hybrid model is called for, wherein WMF sees that its job is to:

- 1. make some tough decisions**
- 2. be courageous and innovate**
- 3. commit resources and be accountable**

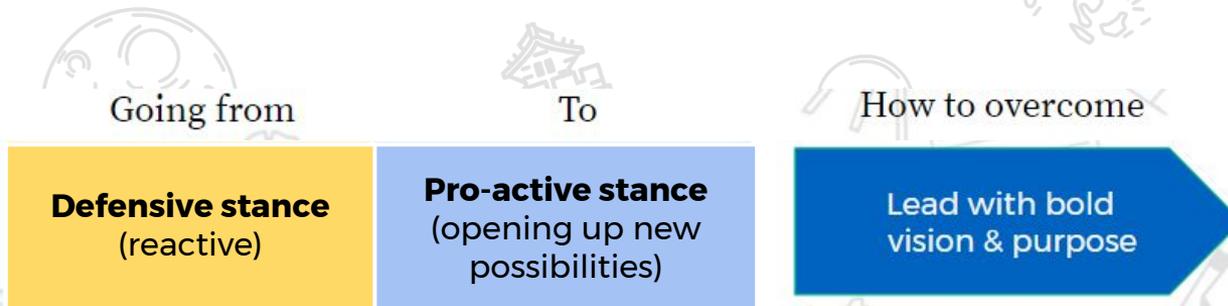
Building a conscious, intentional model that maximizes respect, governance and efficiency should be a primary goal going forward.

This is not a small task, but we believe it is the single most important area to improve.

# 1. Make tough decisions

The Wikipedian dynamic of radical decentralization and endless iteration should be respected -- it is what has built the largest body of free encyclopedic knowledge in the world -- but should not undermine **accountability**. [WP: no deadline.]

For the strategic direction to work, the movement needs a **culture of leadership / management that establishes clear owners who are empowered to make decisions against deadlines**, knowing that perfection is the enemy of the good. Unending debate and criticism can block accomplishments and diminish enthusiasm, but movements find success when they lead with bold vision and purpose.<sup>[1]</sup>

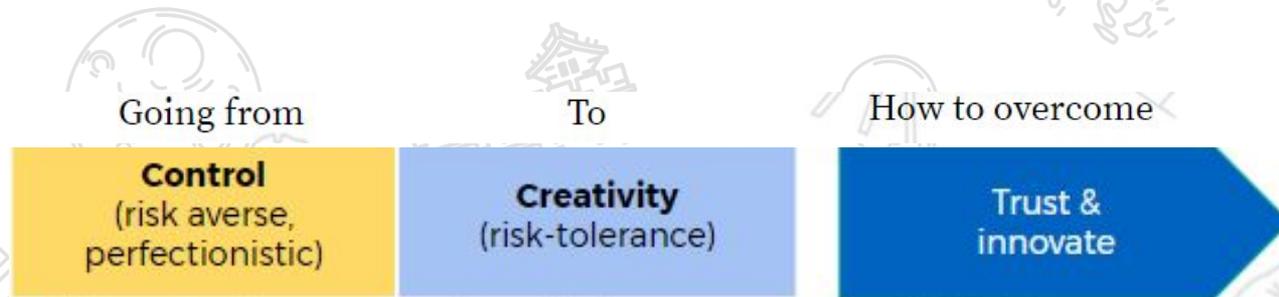


## 2. Be courageous

As Wikimedians reviewed the strategic direction this past month, a common request was made: **be bolder**.

Respect for the volunteers on whom the movement depends is paramount, but the fear of making change that might upset some of those constituents can paralyze WM from **adapting to a changing world**. An overly critical culture keeps people nervous about taking a stand, which is needed to do something as radical as setting knowledge free for people everywhere.

WM can never please everyone, and that is recognized. What it can and must do to move forward collectively is **take risks and test out new approaches**.<sup>[1]</sup> Try new initiatives in emerging markets, and encourage innovation from change-makers within the movement to build a more inclusive, healthy community.



# Launch new initiatives in emerging markets



*Some suggestions/examples...*

**NSIBIDI  
INSTITUTE**

Partner with Nigerian cultural center to explore the collection and distribution of local knowledge through alternative means such as oral history, audio and video.

**NIGERIA  
NATIONAL  
YOUTH  
SERVICE  
CORPS**

Partner with Nigerian gov't/university graduates to collect local stories and design a Wikipedia-based curriculum for use by NYSC participants in local schools.

**MTN  
FOUNDATION**

Partner with Africa's largest telecom company to improve access to digital knowledge with an emphasis on monitoring uptake and onboarding volunteers from university.

**PEOPLE'S  
ARCHIVE OF  
RURAL INDIA**

Support a grassroots initiative to gather and preserve local knowledge in rural India.

**ASHOKA**

Support social entrepreneurs around the world on projects relevant to knowledge sharing.

**GOOGLE.ORG**

Work with Google's philanthropic arm to build awareness of WM and establish robust local "free knowledge" communities.

### 3. Make & keep commitments, re-build trust

WM's progress to overcome a history of disempowerment and mistrust is encouraging but precarious. Potential partners, affiliates and WMF staff **expect and rely on real commitments** to do their work.

Now is the time to clearly say what WM (and WMF) is going to do and then do it. Stepping up to put real **money behind various initiatives** will show the new strategic direction in action.

This might mean **shifting funds and power to communities that have (thus far) been left out** of the free knowledge movement.

Then **execute** - even if the strategy isn't perfect. Leading by example will help rebuild trust, and the strategy will evolve and adjust over the next 5 years.



# Appendix

# References

## Briefing

- [WMCONF Briefing Presentation](#) (and [video](#))

## Summary & Synthesis

- [WMF All-Hands Summary Report](#) (Jan 2017)
- [Affiliate ED Meeting in Lausanne](#) (Jan 2017)
- [Cycle 1 Synthesis Report](#), [methodology](#), and [resulting 5 themes](#) (Mar-Apr 2017)
- [Wikimedia Conference Summary Report](#) (Mar 2017)
- [Cycle 2 Synthesis Report](#) (May-Jun 2017)
- [New Voices Synthesis Report](#) (Mar-Jul 2017)
- [Cycle 3 Synthesis Report](#) (Jul-Aug 2017)
- [Wikimania Summary Report](#) (Aug 2017)

# Goals for this process

As a movement, **identify a cohesive direction** that aligns and inspires us all on our path to 2030.

**Build trust within our movement** through participation in an open process based on shared power.

**Better understand the people and institutions** that form our movement, those we are not yet reaching, and how their needs may change over the next 13 years.

**Build a shared understanding** of what it means to be a movement, how others outside of us can take part, and what it will take to increase our movement's impact.

**Build relationships** to expand and enrich our movement and prospective partners.



# Establish concrete goals (& track to them)

## Recommendations:

- Identify big things you want to accomplish over time with the community (as part of Phase 2)
- Recognize this is where the 2010 strategy fell apart; it is VERY hard
- Re-energize the Metrics discussion

## Examples:

### by 2025

85,000 editors total. 1,000 new editors from emerging markets. 3,000 new female editors.

Three new ideas “beyond the encyclopedia” that we think might scale.

## Criteria:

- Applies to the whole movement
- Long-term: requires significant time & effort to accomplish, 7-10 years.
- Sufficiently concrete that you know when they are achieved.
- Attainable but ambitious, a stretch goal

### by 2030

100,000 editors total. 5,000 new editors from emerging markets. 8,000 new female editors

One new idea “beyond the encyclopedia” that achieves scale.

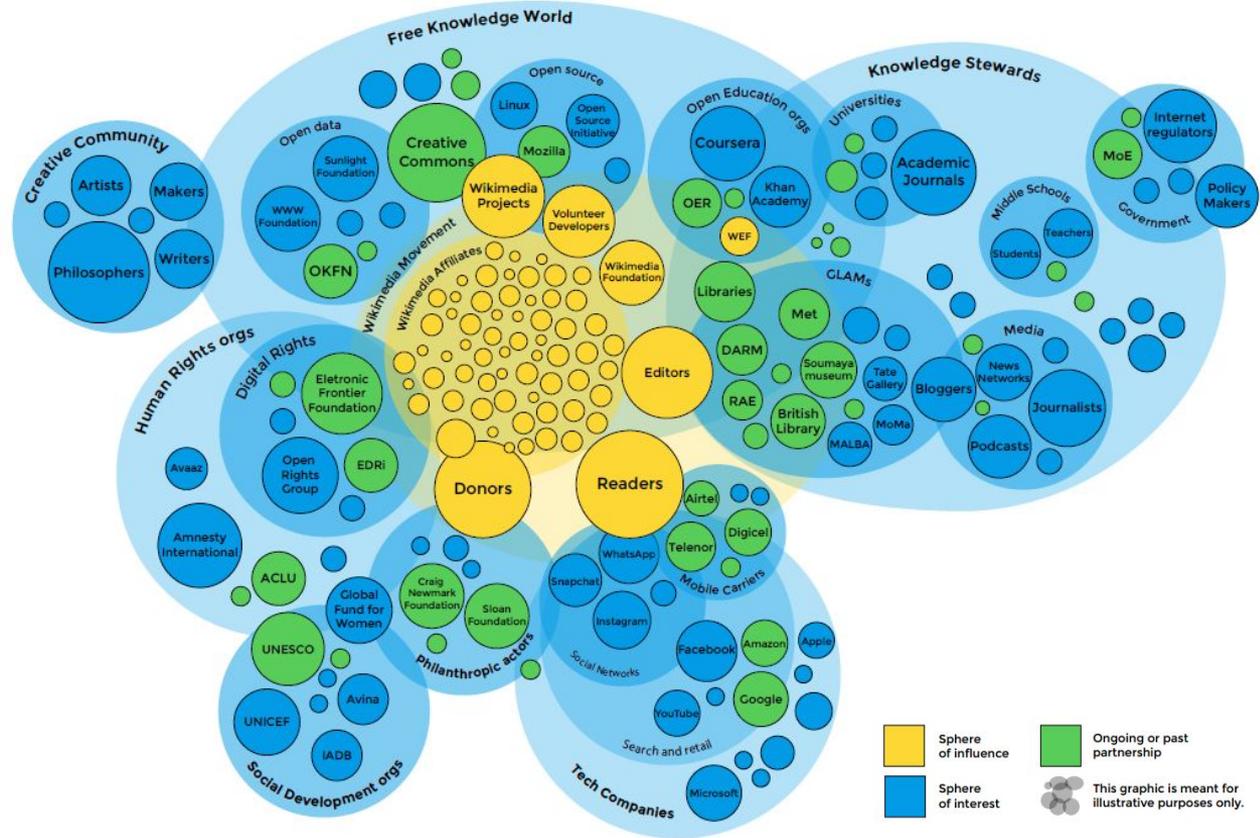
# Continue to build relationships

Remember, WM is not on its own; it is part of a much larger “free knowledge” movement, and has siblings.

So many partners have appreciated discussing these important issues with WM - and want to work more closely with WM. Keep strengthening these relationships.

Become a trusted partner by giving respect, leading by example and following-through on commitments.

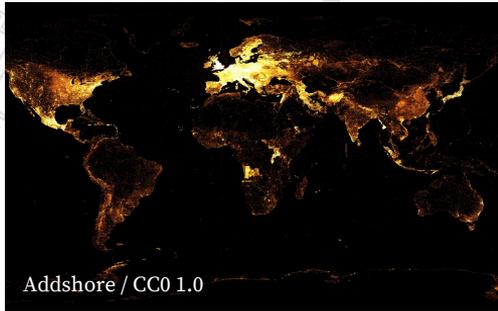
Consider Google, Ashoka and other strategic partnerships.



# How can we be most successful - as a movement?

Our challenges	Going from	To	How to overcome
Self-interest & internal power struggles	<b>Competition</b> (self-interested groups)	<b>Strategic direction</b> (for collective impact)	Align & move collectively
Stuck defending against conflict (often on the periphery)	<b>Defensive stance</b> (reactive)	<b>Pro-active stance</b> (opening up new possibilities)	Lead with bold vision & purpose
Tough environment for new communities to enter	<b>Marginalization</b> (even within movements)	<b>Distributed power</b> (among those most impacted)	Listen to people & communities
Limited engagement of those outside Wikimedia	<b>Isolation</b> (narrow focus, fragmented)	<b>Interdependence</b> (unified ecosystem)	Invite broad awareness
Resistance to change	<b>Control</b> (risk averse, perfectionistic)	<b>Creativity</b> (risk-tolerance)	Trust & innovate

# Every single human being...



Bringing new voices to the movement will help it curate **less biased, higher quality** knowledge.

Requires **active outreach** to new places and new partners.

Should resolve the complexity of accepting **new, diverse forms of knowledge** to maintain verification across projects.

Accessibility of free knowledge across **all languages** is key.

# ...can freely share



**Active, empowered communities** are central to the sustainability and future of the movement.

Requires proactive steps for everyone to feel **included and respected**, regardless of gender or geography, socioeconomic status or education.

Should design experiences and tools to better support and **welcome newcomers**.

# ...in the sum of all knowledge



Grow with reliable, verifiable, and **high-quality content** - especially in age of misinformation.

**Partnerships** will make the movement more effective in engaging more people and advocating for more free and open content.

To keep up with evolving times, **advance technology** to match people's' needs.

# Ashoka: Three Proposals for Partnership

## Context Assumptions

- Recognizing WMF's intention to expand successfully in the developing world, its past pilot difficulties, and its desire to learn from Ashoka's experience and collaborate on entrepreneurial activities in various regions, we propose this three-phase partnership:

### Learn

- Coordinate education campaign within WMF around social entrepreneurship
- Organize half-day session with Bill Drayton
- Publish relevant materials to the broader community

### Test

- Work with Ashoka on ~5 new initiatives
- Focus on identifying free knowledge change agents in key regions
- Conduct multi-year initiatives with Ashoka, adding support from WMF

### Scale

- Track metrics on progress for new initiatives & evaluate fully
- Decide on plan for scaling up successful initiatives
- Create roll-out schedule for the most promising & scalable ventures

# Emerging market initiative ideas (NGO)

Partner with institutions like [NSIBIDI Institute](#) an independent knowledge and cultural centre working to retell, rethink and reimagine the Nigerian narrative on “[The Memory Project](#)” a local initiative that collects oral histories of Nigeria in order to preserve and disseminate cultural knowledge.

Why: Reports from the new voices track suggested that in order to gain relevance in emerging market countries Wikipedia would need to identify and explore new ways of collecting and disseminating knowledge. Respondents in focus groups noted strong emotional ties to projects that enhanced knowledge and understanding of local histories largely preserved by oral tradition that are disappearing as older generations die out. By partnering with existing organizations that have local credibility and reach, WMF can effectively explore the collection and distribution of knowledge in EMCs. For example

- 1.) What are the best means for collecting oral histories? (audio, visual entry)
- 2.) How can WMF develop a hybridized verification system for oral histories/video entries
- 3.) How do you train or how can local WM chapters develop effective and replicable systems for “editors” to collect and catalogue oral and video entries
- 4.) What user interfaces allow for the most effective creation and distribution of new content
- 5.) What are the best means of marketing and distribution for these new types of WM entries?

Studies such as this would both be effective in generating new content and structured to methodically examine and create new standardized and replicable processes for entries.

# Emerging market initiative ideas (PRIVATE SECTOR)

The MTN Foundation Nigeria has runs initiatives in Health, Education, and economic empowerment. Their education program includes the [Universities Connect Project](#) which seeks to create a collection of digital resources from different libraries with the aim of assisting university students and lecturers with research work and study.

MTN is the largest telecommunications company in Africa and the largest mobile provider in Nigeria with about 60m subscribers. Piloting concepts that improve access to digital knowledge could provide interesting avenues for exploring:

1. New partnerships that promote access to content -- ex free data for Wikipedia Usage
2. Onboarding of volunteers/editors through recruitment of university students/faculty
3. ME of usage uptake in controlled and targeted populations

# Emerging market initiative ideas (GOVERNMENT)

Partner with National Youth Service Corps in Nigeria to engage recent university graduates in collective action to catalogue the sum of all knowledge in Nigeria.

Every year NYSC enrolls 250,000 Nigerian graduates who are expected to perform one year of service to the nation. Most end up teaching in local schools around the country. WMF could work with NYSC and the Ministry of Education to 1.) devise a Wikipedia based curriculum for use by NYSC participants in local schools. 2.) work with NYSC participants to collect local stories and knowledge for the Wikipedia interface. There is a potential to reach millions of school children in Nigeria and prove concept of how you execute against the direction of knowledge equity.

This program would test the best way to develop new partnerships that are not traditional to the independent WM stance and determine best practices for working with government entities that often have outsized impact in emerging market (particularly SSA) countries.