Building strategic processes within the movement

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Wikimedia Conference 2017, Berlin, 31st of March 2017
Rough Outline

- **Introduction (5 min) - Mattias & Philip**
  - Difference between strategy and operational processes

- **SWOT analysis (15 min) - Philip**
  - Work in teams of 3-4 (depending on attendance size)
  - Deriving strategic goals from the SWOT analysis

- **Presentation of the results (15-20 min) - Teams**

- **Creating a strategy for your organisation (10 min) - Mattias**
  - Steps towards building a strategic process
  - What does the yearly cycle (first year and following years) look like?

- **Q&A session (10 min) - Mattias & Philip**
  - How to proceed? Next steps when you get back, etc.
Introduction of Mattias & Philip

- **Mattias Blomgren**
  - Background in Systems Analysis
  - IT Architect in Transport & Logistics Business
  - Member of the Board of Wikimedia Sverige since 2012, Chairman since 2013

- **Philip Kopetzky**
  - Background in business and computer science
  - Consultant (business software for big companies)
  - Member of the Board of Wikimedia Austria since 2016 (Agendas: mainly international relationships and strategic development)
Introduction to strategic processes

- Strategic process in order to establish a strategic plan that will outline your community’s goals for the next 2-3 years
  - It gives a common view: What kind of organisation should Wikimedia xyz be in 2-3 years?
  - How can we further the goals and mission of the organisation?
  - Usually undertaken by the top level management and board, i.e. the board and key staff members (in most cases probably the ED)

- Establish and reevaluate
  - Establish a strategic plan by consulting everyone close to the chapter (community, partners, etc.)
Vision - Strategy - Annual plan

- **Vision**: What we want to achieve - a future state
- **Strategy**: Determination of the long-term goals
- **Annual plan**: Operational activities to achieve the goals
Examples for strategic and operational processes

**Strategic:** We want to become the leading GLAM-NGO in our country in 2-3 years time

**Operational:** Planning this year’s GLAM activities according to the strategy

**Strategic:** Strengthen our position within our country’s society

**Operational:** Plan 3 new partnerships in the upcoming year, planning steps to establish your organisation within society
Examples for strategic and operational processes (2)

**Strategic:** Support the creation of audio and video knowledge

**Operational:** Contact organisations who are knowledgeable in creating audio and video content, specifically support volunteers who are interested in these topics

**Strategic:** We want to acquire 25% more members in our chapter by 2020 from outside the movement

**Operational:** Plan a membership campaign focusing on specific groups like donors or partners
SWOT Analysis: Wikimedia Antarctica needs you!

- Create a SWOT diagram for Wikimedia Antarctica. Here are a few facts:
  - Wikimedia Antarctica is a chapter run by penguins for penguins in the penguin language (pen.wikipedia.org)
  - Penguins have very special, narrowly focused interests
  - This is a real chapter, including all the rights and obligations (simpleAPG, quarterly reports)
  - Current budget is 50,000 USD
  - Penguins don’t like to write reports and can’t stand polar bears
- Make assumptions!
- Formulate 3-4 strategic goals based on your SWOT diagram
- Present your findings to the other groups!
Christopher Michel, Penguin in Antarctica jumping out of the water, CC BY 2.0
Creating a strategy for your organisation

● Involve the community and members of the affiliate
  ○ Questionnaire to active members of the community
  ○ Questionnaire to all members of the affiliate (Note: There is an overlap between the two group.)
Creating a strategy for your organisation

- The board works with the strategy based on the input from the members

**Trends in the surroundings**
- Financials
- Legal
- Politics
- Society
- Technology

**Impact on us**
- Impacts most
- Impacts rather much
- Medium impact
Creating a strategy for your organisation

- Invite to a member meeting
  - Input and feedback on the strategy

- Approve the strategy
  - Let the annual meeting decide and approve the strategy

From Member meeting workshop Wikimedia Sverige August 2015
By Jan Ainali (Own work) CC BY-SA 4.0, via Wikimedia Commons
Follow-up the strategy for your organisation

- The strategy shall be valid for several years
- Do a follow-up the following years and make necessary updates
  - Do it when you work on the annual plan
  - Let the annual meeting approve the updates
Q&A
Questions & Answers

- Was it hard to understand what strategy work is about?
- How to proceed? Next steps when you get back, etc
- Will you create a strategy for your affiliate?
- What do you expect the most common issues to be when designing a strategy for your community?
Learn from other affiliates (examples)

- Sweden: https://se.wikimedia.org/wiki/Strategi/en
- Austria: https://mitglieder.wikimedia.at/Projekte/Strategy2017%2B
- Find out more about other chapters and affiliates: https://meta.wikimedia.org/wiki/Wikimedia_movement_affiliates