

Building strategic processes within the movement

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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



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



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

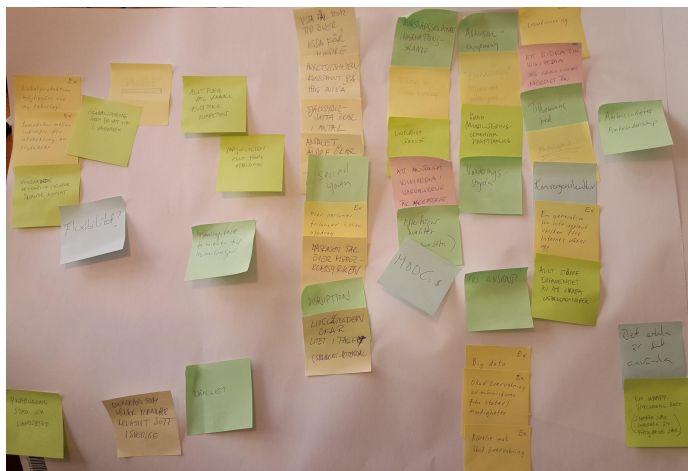
- Involve the community and members of the affiliate
 - Questionnaire to active members of the community
 - Questionnaire to all members of the affiliate (Note: There is an overlap between the two group.)

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



From Board workshop Wikimedia Sverige
By Jan Ainali (Own work) [CC0], via Wikimedia Commons

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



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>
- Netherlands:
https://nl.wikimedia.org/wiki/Strategie/Strategie_2017-2020/English
- Germany:
https://meta.wikimedia.org/w/index.php?title=Kompass_2020/en&uselang=en
- Austria: <https://mitglieder.wikimedia.at/Projekte/Strategy2017%2B>
- Norway: https://no.wikimedia.org/wiki/Strategy_2016-2020
- Find out more about other chapters and affiliates:
https://meta.wikimedia.org/wiki/Wikimedia_movement_affiliates