

HOW TO USE THIS DECK

1. **Adapt** the slides to fit the purpose of your discussions.
 - a. Keep things light: delete slides you don't need, and keep an eye on the [optional] content
 - b. Fill in highlighted boxes in later slides
 - c. Numbers of **slides to be adapted**
2. **Translate** the content to your language.
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A Beginner's Guide to Movement Strategy

[EVENT NAME/DATE/PRESENTER(S)]



Agenda

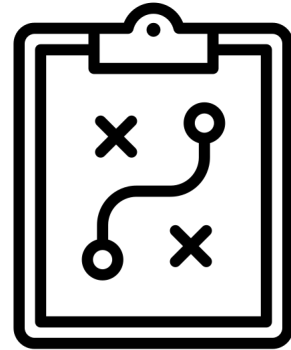


- Overview
- Basics of Movement Strategy
- Current state of Movement Strategy
- Opportunities for [YOUR COMMUNITY]
- Questions & comments

01 What is Movement Strategy?

What is “Movement Strategy”?

- A **plan for structural change** in the Wikimedia movement, to define its future until at least 2030
- A **collaborative process** for the Wikimedia Foundation, affiliates and communities to achieve this change

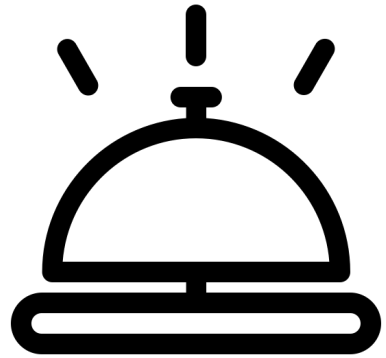


Created by Eko Purnomo
from the Noun Project

Movement Strategy is a process to figure out what change needs to happen in the Wikimedia movement towards the future. The “movement” includes all Wikimedians, and is usually described as three major stakeholder groups: online communities (e.g. English Wikipedia community), affiliates (including chapters and user groups, e.g. Wikimedia Indonesia), and the Wikimedia Foundation.

What makes it special?

- **First process of its kind** in the Wikimedia Movement
- **Led by and for** the Wikimedia communities, affiliates and Foundation **together**, regardless of where they are based



Created by Arthur Shlain
from Noun Project

Movement Strategy (MS) is a way for all Wikimedians to work towards the same goals: whether they are based in Iraq, Ghana, Peru or anywhere else, MS gives them a common goal to work towards. It is really about collaboration and coordination for those who want to work together on cross-project, regional, and movement level.

Why a “Movement Strategy”?

- The Foundation, affiliates and communities work for a **common goal**, but without a common strategy:
 - Limited **equity** in decision-making & resource allocation
 - Lack of **collaboration & power sharing** between the Foundation, affiliates & communities



Movement Strategy was inspired by the need for the Foundation, affiliates and communities to work together. This means that the goals aren't only about, say, Wikipedia, but they extend to all the organizations and people working in the movement.

One of the main struggles for the collaboration between those groups was finding a collective way to make decisions. One major example is funding: The funds of the Wikimedia movement belong to “everyone” in the movement (communities, affiliates and Foundation), so who decide how/where to spend them? How do they ensure equity in this process? One of the goals of movement strategy is finding answers **together** to such difficult questions.

Why a “Movement Strategy”?

- The **world is changing**, and the Wikimedia Movement needs to adapt rapidly:
 - **Demographically:** Booms in African & MENA users, aging population, increased literacy
 - **Technologically:** Shifts to mobile devices, audio & visual content, AI and more
 - **Misinformation:** New technological & political challenges



Created by Musmellow
from the Noun Project

Numerous research was conducted in 2017 to show the various changing trends in the world and how they will affect Wikimedia.

See this page for a full list of the research and results:

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2017/Reports#Final_research_reports

Why does it matter to you?

- Two-way exchange - learning from the **experiences and knowledge of Wikimedians everywhere**
- The Movement Strategy encourages us to **build collaborations to help each other**
- Wikimedia Foundation facilitators are bringing **your community's unique perspective** to Wikimedians everywhere



Created by Adrien Coquet
from the Noun Project

What is the opportunity in Movement Strategy? For many Wikimedians, the main objective is doing our daily contributions to projects like Wikipedia, Wikidata, Commons, and others. For those, there is often no significant need for such contributors for a large scale, movement level strategy. Some of these contributors even question the whole concept of movement, which is hard to notice from their standpoint.

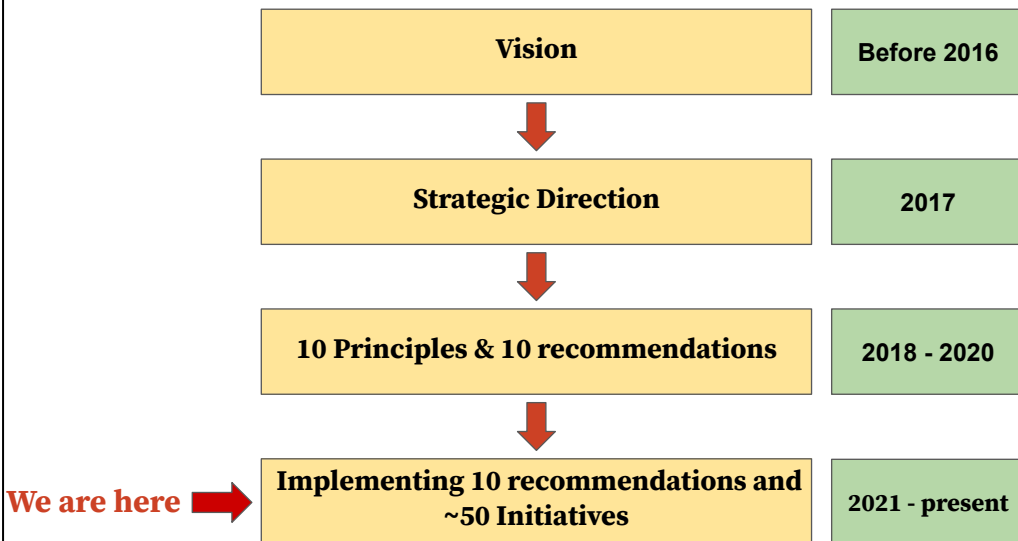
At the same time, we know that no encyclopedia or any wiki project could be built by a single person. The concept of community is at the heart of what we do. The Movement Strategy is calling us to connect our community to others. If you are working on something new in your project, chances are that it is *not* new for others, and someone would already have valuable experience, tools or other resources to share with you.

If we would like to start benefiting from this knowledge and experience that we have across different our hundreds of communities, then we need to figure out how to make

collaborations and exchanges between them to help each other. The opportunity here is to work together to improve the way we do things (like partnerships, content quality, etc.) in all of the Wikimedia communities combined. This has the potential to increase the capacities that we have in our local communities through peer networking and learning and would reduce the energy spent on reinventing the wheel each and every time a single project faces the challenge that many others have already faced.

02 Basics of Movement Strategy

Timeline of Movement Strategy



This is a very broad timeline of the main documents produced as part of Movement Strategy. It also orders them from the least to most detailed. The vision (which existed *before* Movement Strategy) is a single sentence, while the recommendations are over fifty pages long. The upcoming slides will explain what each of those components are.

Vision

“Imagine a world in which every single human being can freely share in the sum of all knowledge. That's our commitment.”

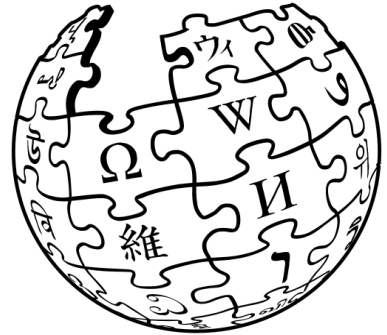


Image: Wikimedia Foundation. CC BY-SA 3.0

This is a famous quotation by Jimmy Wales, which was adopted as [the vision](#) of the Wikimedia Foundation and commonly cited as a shared [purpose statement](#) for the Wikimedia projects.

The need for a Strategy

In 2016, the Board of Trustees of the Wikimedia Foundation asked:

- What does the Wikimedia movement need to fulfill our “vision”?
- What does it mean to be a “movement”?

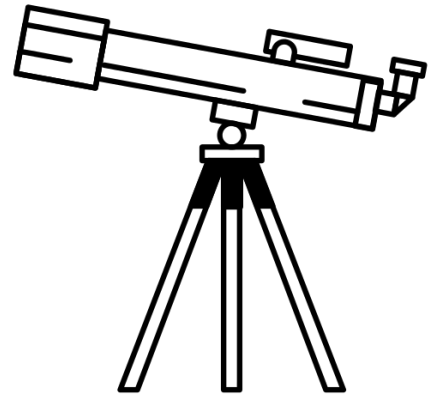


Image: Outstandy- Own work, CC BY-SA 1.0

Until 2016, the Wikimedia Foundation organized half a [dozen movement strategy processes](#) (in 2004, 2006, 2009, 2010-2015 and 2016). In 2016, the Board [approved](#) a new process, which is still ongoing. This current process of Movement Strategy was new in two ways:

1. Its sheer and ambitious time span of 15 years (the process was proposed after Wikipedia reached its fifteenth anniversary).
2. [Its goals](#) that extend beyond the immediate priorities for the Wikimedia projects (which were often tied to “participation” or “quality”), and which aiming towards a long-term vision of a global movement. This shows in the focus of this process on setting a guiding Strategic Direction that is aligned with the Wikimedia vision, and that is oriented towards the “movement” rather than individual wikiprojects or Wikipedia.

The Strategic Direction

“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.”



Image: Svenja Kirsch, Anna Lena Schiller, CC BY-SA 4.0

The [Strategic Direction](#) is the first product of the Movement Strategy process (see previous slides). It tells us what the Wikimedia Movement aims to achieve together by 2030.

The Direction was the result of months of consultations in which over 100 communities and affiliates participated, and who contributed 3,000 statements ([report](#)). It was [endorsed](#) by 99 affiliates and ~150 Wikimedians.

The Strategic Direction Twin Goals

Knowledge as a service: To serve our users, we will become a platform that serves open knowledge to the world across interfaces and communities.

Knowledge equity: As a social movement, we will focus our efforts on the knowledge and communities that have been left out by structures of power and privilege.

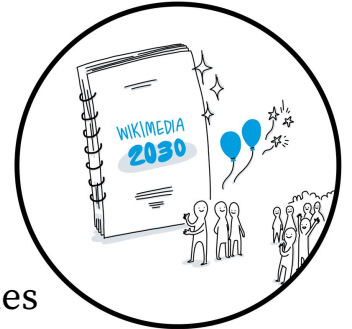


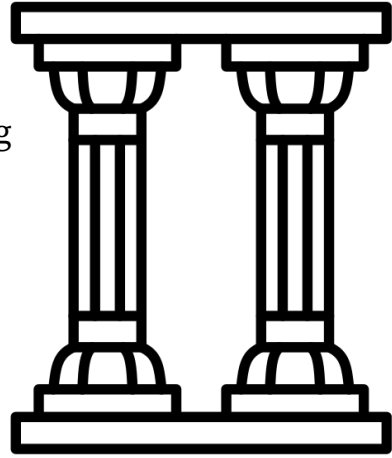
Image: Svenja Kirsch, Anna Lena Schiller, CC BY-SA 4.0

The strategic direction unites and inspires the Wikimedia Movement on our way to 2030. [Two goals](#) guide this direction. In a simplified language, they are:

- **Knowledge as a Service** - Become a platform that serves knowledge in many formats and builds tools for allies.
- **Knowledge Equity** - Focus on the knowledge and communities that structures of power and privilege have left out.

The Principles

- People-centredness
- Safety and Security
- Inclusivity and Participatory Decision-Making
- Equity and Empowerment
- Subsidiarity and Self-Management
- Contextualization
- Collaboration and Cooperation
- Transparency and Accountability
- Efficiency & Resilience



Created by SAM Design from the Noun Project

The Principles are the fundamental beliefs that guide work across our Movement. **They are integrally connected and together speak to what it means to be a Wikimedian.**

The Principles were created to help guide the Movement Strategy recommendations' implementation. For example, when creating a regional hub (according to the recommendation #4), this hub shouldn't exclude any community (Inclusivity principle), nor leave small communities unrepresented (Equity principle), nor work behind close doors (Transparency and Accountability principle), and so on.

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Movement_Strategy_Principles

The Recommendations

1. Increase the Sustainability of Our Movement
2. Improve User Experience
3. Provide for Safety and Inclusion
4. Ensure Equity in Decision-making
5. Coordinate Across Stakeholders
6. Invest in Skills and Leadership Development
7. Manage Internal Knowledge
8. Identify Topics for Impact
9. Innovate in Free Knowledge
10. Evaluate, Iterate, and Adapt



Image: CC BY-SA 4.0 Riesenspatz / Svenja Kirsch, Anna Lena Schiller

The recommendations are the changes that we need to make in order to reach the Strategic Direction. They focus on ten broad areas of change in the movement. Each recommendation in turn contains a list of “Changes and Actions”, which we call “[initiatives](#)”. Initiatives are the detailed steps that we will need to take to achieve the goal of each recommendation.

The next slides will briefly introduce each of the ten recommendations and some of its main initiatives. Not all initiatives are listed here, because there are about fifty of them.

For more:

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations

1. Increase the Sustainability of Our Movement

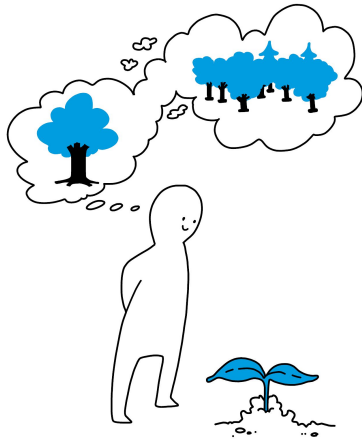


Image: CC BY-SA 4.0 Riesenspatz / Svenja Kirsch, Anna Lena Schiller

Increasing our movement's sustainability:

- Focus on underrepresented communities
- Recognizing volunteers
- Awareness about Wikimedia
- Local fundraising capacity
- Environmental sustainability

This recommendation aims at sustainability of the movement in different ways, including:

1. People (who need more support, recognition, etc.).
2. Money (which needs to be diversified, e.g. through local fundraising support).
3. Environment (e.g. by reducing plastic waste at events).

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Increase_the_Sustainability_of_Our_Movement

2. Improve User Experience

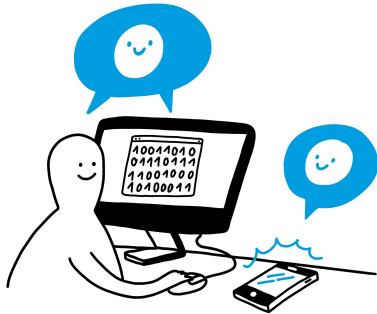


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Addressing the usability and accessibility of our products:

- UX research, testing, and dissemination
- Adaptability to various devices
- Resources for newcomers
- Peer spaces
- Cross-language tools

This recommendation is all about the Wikimedia projects. It calls to continuously improve the experience of users, whether readers or contributors, by providing a better interface, tools, and experience for all. It especially aims to include newcomers and to support users in multiple languages. One of the proposed outputs, for example, is creating tools (e.g. templates) that can be used in any Wikimedia project without having to duplicate or recreate them.

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Improve_User_Experience

3. Provide for Safety and Inclusion



Image: CC BY-SA 4.0 Riesenspatz / Svenja Kirsch, Anna Lena Schiller

Addressing harassment and providing for safety:

- Universal Code of Conduct
- Reporting harassment
- A safety assessment and execution plan
- Privacy tools
- Advocacy for free knowledge

This recommendation aims to keep the Wikimedia projects, organizations and movement as a safe and inclusive environment. It addresses internal problems in communities, like harassment or conflict, and also external problems, like the privacy and safety of contributors in certain countries and public policy.

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Provide_for_Safety_and_Inclusion

4. Ensure equity in decision-making

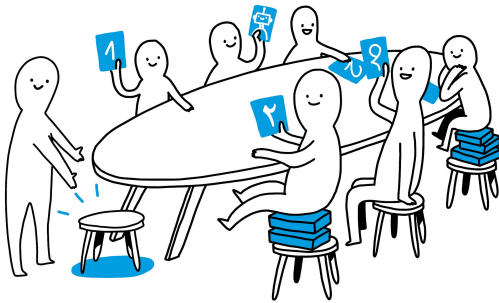


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Equitable representation in decision-making & resourcing:

- Movement Charter
- The Global Council
- Regional and Thematic Hubs
- Resource allocation framework
- Good practice guidelines for governance bodies / boards

This recommendation is about finding fair and collaborative ways to make decisions in the Wikimedia movement. For example: If there's a decision that affects everyone, like funding, how can the Wikimedia Foundation, its many communities and its many affiliates agree on a way to resolve it? And how can the resulting decision fairly include everyone? This recommendation is about establishing new ways to make decisions (through the Movement Charter and the Global Council), to provide more support to emerging communities (through hubs and resource allocation), and to encourage power sharing and equity (through guideline for all Wikimedia boards).

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Ensure_Equity_in_Decision-making

5. Coordinate Across Stakeholders



Image: CC BY-SA 4.0 Riesenspatz / Svenja Kirsch, Anna Lena Schiller

Creating spaces for improved collaboration:

- Clearly defined roles and responsibilities
- Spaces for communication with partners, technical developers & others
- Technology Council

Implementing a Movement Strategy across a movement of one hundred thousand people who speak hundreds of languages and live in virtually every country requires *a lot* of collaboration. This recommendation is about improving those collaborations both within the Movement (e.g. between affiliates from different countries), and outside (e.g. with GLAM, education and other partners).

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Coordinate_Across_Stakeholders

6. Invest in Skills and Leadership Development

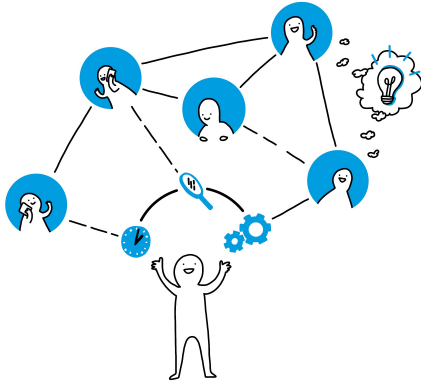


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Developing skills in individuals and organizations:

- Systematic approach to skill development
- Leadership development plan
- Online learning
- Peer networks & mentorship
- Recognition and incentives

Skill development is essential to keep communities and contributors growing, whether in wiki editing skills, technical skills, even organization skills, leadership roles, and so on. This recommendation is about understanding those skill needs and systematically addressing them.

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Invest_in_Skills_and_Leadership_Development

7. Manage Internal Knowledge



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Preserving the movement's internal knowledge:

- A culture of documentation
- A navigable knowledge base with access to learning assets for the whole movement
- Staff for curation, updating, dissemination, etc.

This recommendation is about how Wikimedians can build an institutional memory to learn together. For example, if a volunteer is organizing a Wikipedia edit-a-thon in Egypt, they can benefit from the experience of hundreds of others who already organized such activities in Ghana, Brazil, India, the US, and many other places. How can we store this knowledge and make sure we learn from it and re-apply it together?

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Manage_Internal_Knowledge

8. Identify Topics for Impact



Image: CC BY-SA 4.0 Riesenspatz / Svenja Kirsch, Anna Lena Schiller

Understanding how our content impacts people:

- Research how our content is used - coverage, quality, verifiability, etc.
- Mitigations for misinformation
- Addressing gaps in high-impact content

There are recurrent concerns from the community about losing the volunteer editing autonomy due to the actions outline here. This recommendation, however, is not about “excluding” or disallowing volunteers from contributing to certain topics. Instead, it is about encouraging contributions to others. It is about deciding where to prioritize funding, resources and support for volunteer contributions. Additionally, this prioritization will be based on the “impact” that is perceived by those communities themselves.

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Identify_Topics_for_Impact

9. Innovate in Free Knowledge

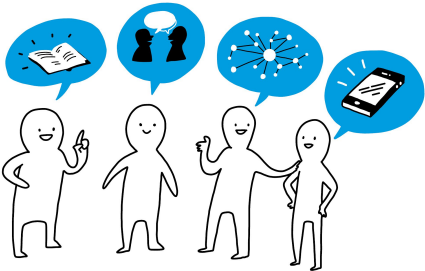


Image: CC BY-SA 4.0 Riesenspatz / Svenja Kirsch, Anna Lena Schiller

Keeping our knowledge projects relevant, diverse and resilient:

- Identify barriers to address gaps in knowledge
- New projects and policies for knowledge equity
- Tools and partnerships for innovation

There are recurrent concerns from the community regarding the intrusion on notability, original research, and sourcing policies. At the same time, there are major barriers in such policies to new kinds of knowledge (for example, oral sources) that hinder equity in the Wikimedia projects. The recommendation aims to address those issues while respecting communities' autonomy.

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Innovate_in_Free_Knowledge

10. Evaluate, Iterate, and Adapt

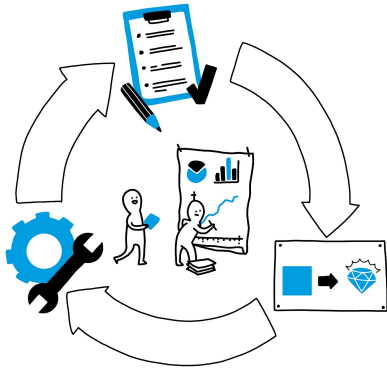


Image: CC BY-SA 4.0 Riesenspatz / Svenja Kirsch, Anna Lena Schiller

Continuous improvement and evaluation of our work:

- Evaluate, monitor, analyze, and learn from activities
- Mutual accountability
- Evaluate and reiterate the Movement Strategy implementation

This recommendation call us not to stop at those 10 recommendations as they are written, but to continuously re-consider what we are doing by course checking, evaluating and improving. The world might change and the recommendations will also have to change (Covid, emerging technologies, etc.).

https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Recommendations/Evaluate,_Iterate,_and_Adapt

03 [OPTIONAL]

Current status of Movement Strategy

This is a completely OPTIONAL section (slides 28-32 in this original file). Please free to remove it if you don't feel like you need it. It focuses on some of the main initiatives that are being implemented through movement-wide committees or collaborations.

Movement Charter

[\(Updates on Meta\)](#)



Image: CC BY-SA 4.0 stefano corradetti

- A document defining the **roles and responsibilities** in the Wikimedia movement, like:
 - The Global Council: A global body representative of the Movement
 - Hubs: Regional and thematic networks for collaboration
- The **Movement Charter Drafting Committee** was formed in November 2021, is expected to work until 2023

Hubs

[\(Meta page\)](#)

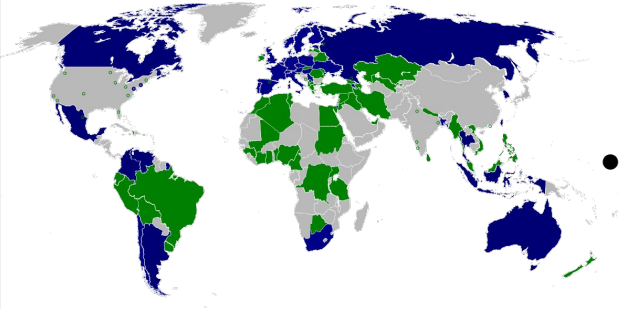
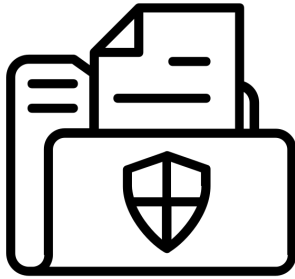


Image: CC BY-SA 4.0 Effeetsanders

- There are about [15-20 hub projects](#) **in-planning or early research stages**
- The Movement Strategy & Governance team held basic **research interviews in what is called “[the Hubs Dialogue](#)”** (see the [findings summary](#))
- Follow the [Movement Strategy updates](#) for **upcoming workshops & events**

Universal Code of Conduct

[\(Meta page\)](#)



Created by ProSymbols

- The Wikimedia Foundation Board of Trustees **approved** [the Universal Code of Conduct](#) on December 2020
- The community voted on its [Enforcement Guidelines](#) in April 2022
- A [volunteer-led Revisions Committee](#) is currently improving the Enforcement Guidelines based on feedback received from the first round and vote.

Leadership Development

[\(Meta page\)](#)

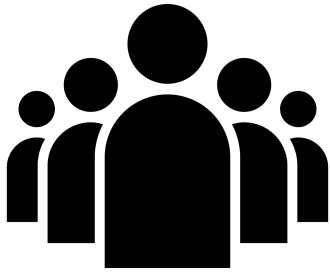


Image: CC BY-SA 4.0 stefano corradetti

- The **Leadership Development Working Group** was formed with 15 members in May 2022
- A volunteer group to **advise leadership development work by:**
 - Drafting a shared definition of leadership
 - Creating a Leadership Development Plan
 - Guiding the implementation of leadership development

04 Why & how you can join?

How is this relevant to you?

- **Supporting existing work:** You may be already working on something connected to Movement Strategy. Consider talking to your community facilitator to get support!
- **Innovating in new work:** Strategy is a opportunity to try your new ideas and turn them into projects
- **Global impact:** Potential to collaborate with Wikimedians from around the globe in implementing Movement Strategy initiatives



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Image: CC BY-SA 4.0 Riesenspatz / Svenja Kirsch, Anna Lena Schiller

This slide explains how all of this (Movement Strategy) can help a community in practice. It show how Movement Strategy can provide support for ongoing and new projects in a community. It connects the previous section of the presentation to this one, but its content is also overlapping with slide #9. Feel free to remove if you don't need it.

Where to start?

Suggested initiatives for [YOUR COMMUNITY]:

- **Regional hub:** Research the possible benefits of a regional collaboration with like-minded communities
- **Skill Development:** Identify the gaps in community skills and develop learning materials for them
- **Topics for Impact:** Investigate which topics on Wikipedia & other projects have the most impact for your community

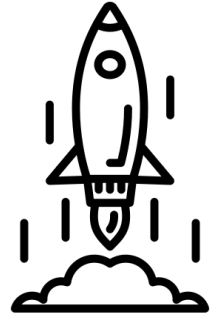


Image: Edwin PM, Noun Project

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This is a section that presenters are invited to completely rewrite in a way that relates to their community. The goal is to select and explain 2-3 [initiatives](#) that may be specifically relevant to the community that this is being presented to, along with an explanation of how those initiatives are specifically important for this community.

Implementation Grants



Image: CC BY-SA 4.0 Noun Project / BLOTJOB

- Supporting projects that directly **push a specific initiative forward**
- Focusing on projects that directly **push a specific initiative forward**
- **See examples** of [funded grants](#) and of [other grant ideas](#)
- **Connect, collaborate and ask questions** [on the MS Forum](#) or Telegram ([join](#))

Movement Strategy implementation grants are a major opportunity to support projects related to the Movement Strategy in any community. Each grant project is required to focus on at least one [initiative](#). There is a lot of useful information and examples on Meta. There are also [facilitators](#) who can also help guide applicants and answer questions.

Interested in engaging?



Image: CC BY-SA 4.0 Riesenspatz / Svenja Kirsch, Anna Lena Schiller

- Not sure how to start? **Read and discuss ideas with other Wikimedians** on the [Movement Strategy Forum](#) (you can have conversations there in your own language!)
- **Learn about events and discussions by** following the [Movement Strategy Updates](#) on Meta

For those who are interested in engaging, feel free to follow Movement Strategy, either on-wiki or through the new Movement Strategy Forum.

04 Summary

Summary about Movement Strategy

- Movement Strategy is an effort to **deal with the upcoming challenges** in the Wikimedia movement and the world **until 2030**
- It includes a broad **Strategic Direction & principles**, and detailed actions for change in the **recommendations & initiatives**
- Movement Strategy implementation **is a collaborative effort for all Wikimedians**: You can implement it locally in your community with the support of grant funds, or globally through discussions and engagement



Quick recap of the three sections of this presentation, which were about:

- What is Movement Strategy?
- Explanation of the basics of Movement Strategy (Direction, recommendations, etc.).
- The available opportunities for your community to take part.

Stay connected, get in touch



For more, we invite you to read the [Movement Strategy playbook](#).

Need assistance? Reach out to the [Movement Strategy & Governance Team multilingual facilitators](#) or email: [**msg@wikimedia.org**](mailto:msg@wikimedia.org)