

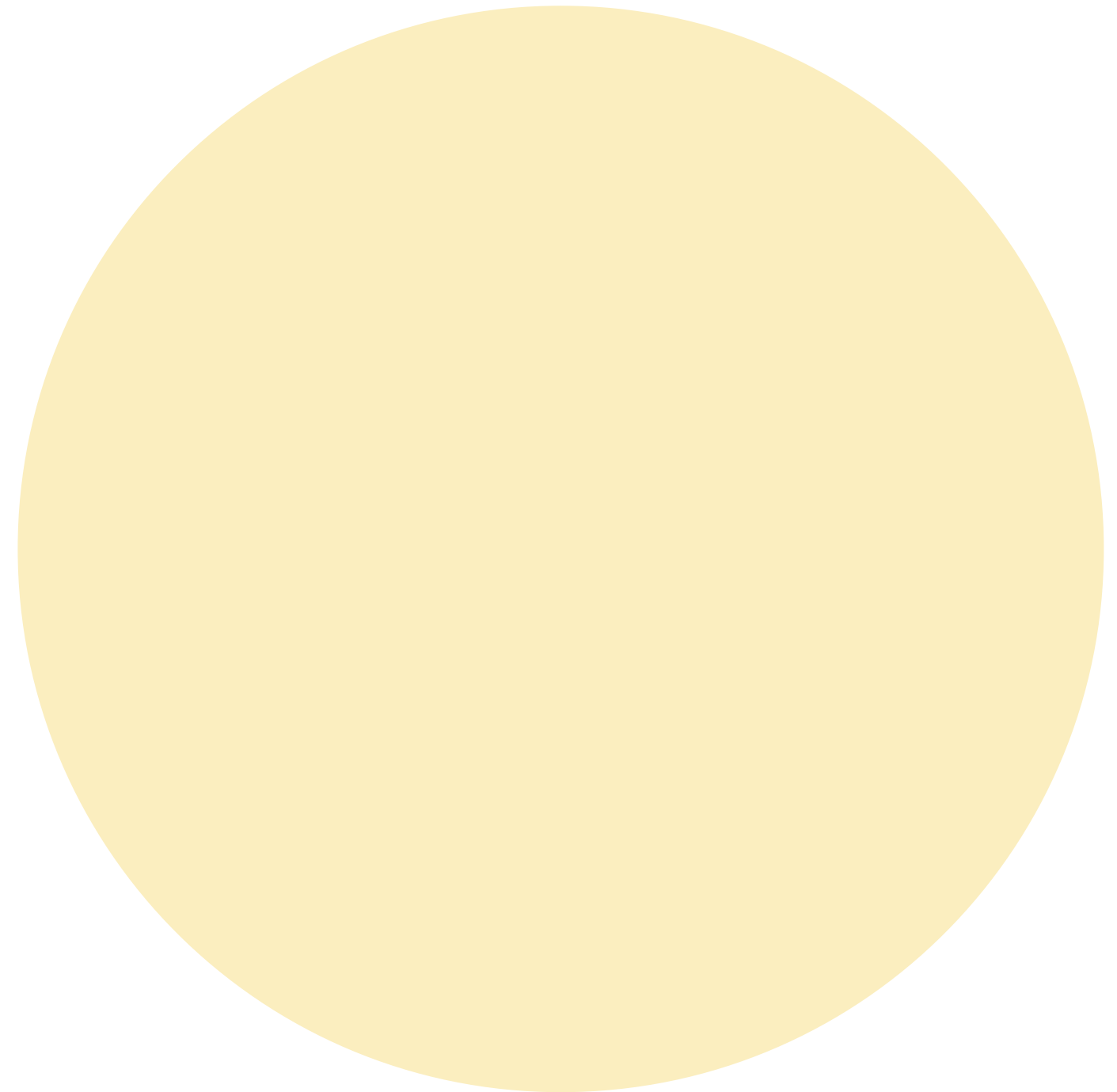
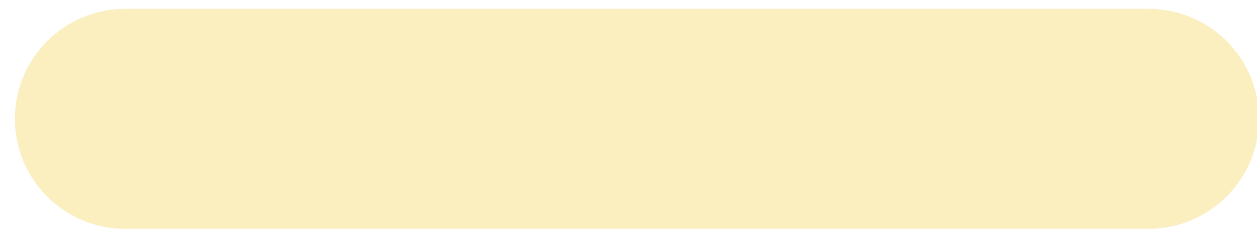
# **Wikimedia Movement Strategy Playbook**

How to create an open strategy together



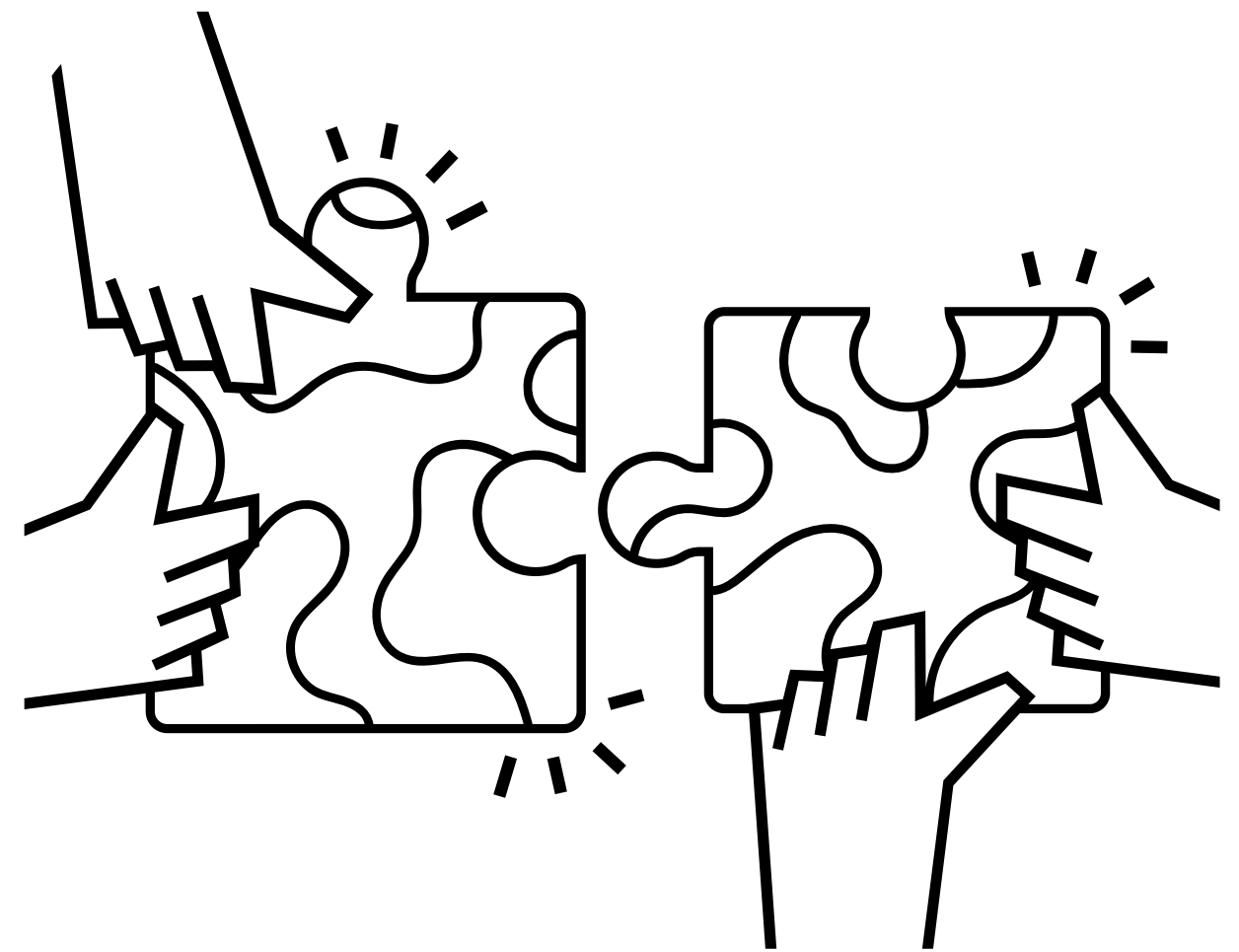


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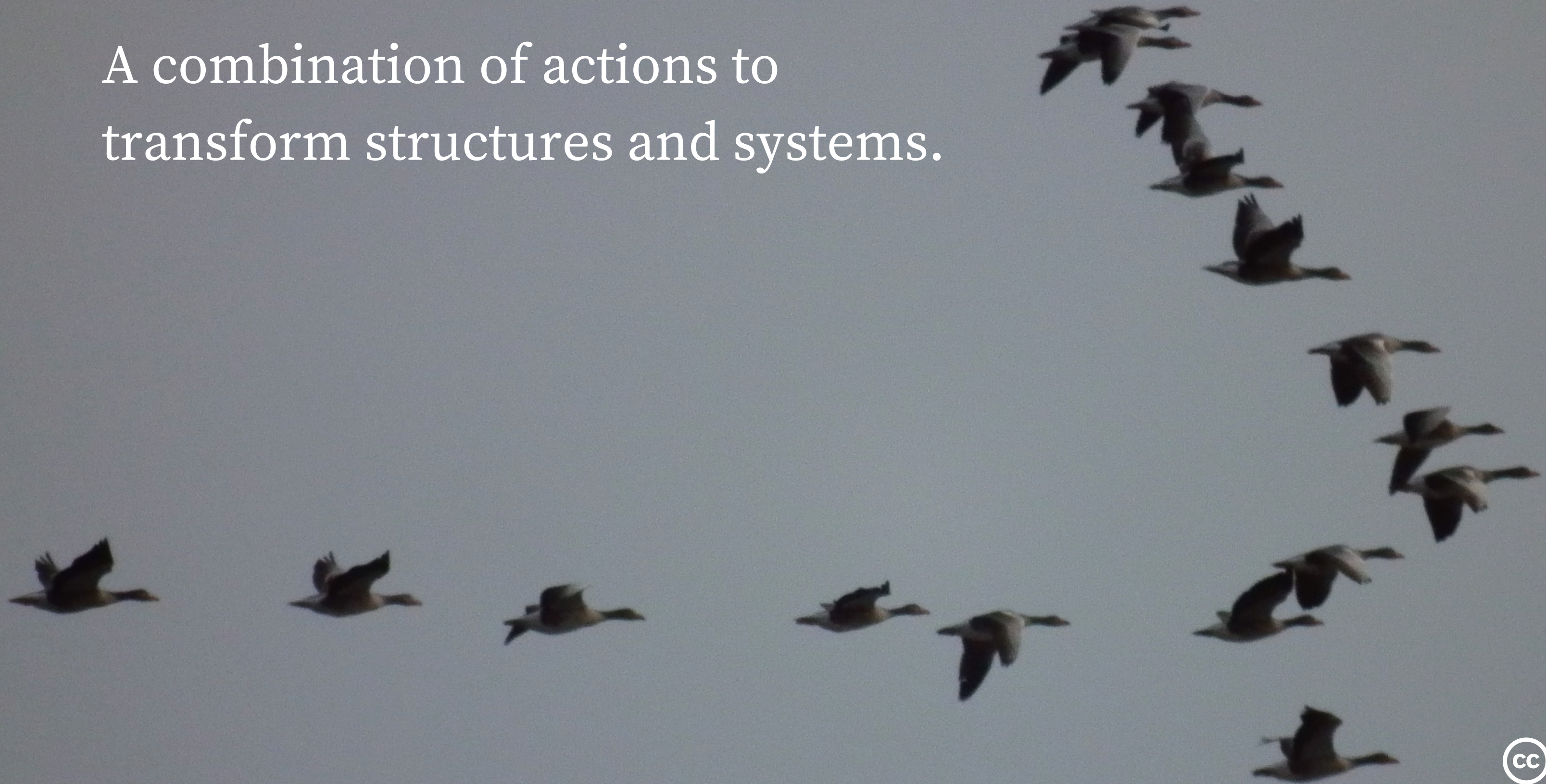


# What is Movement Strategy ?





A combination of actions to  
transform structures and systems.

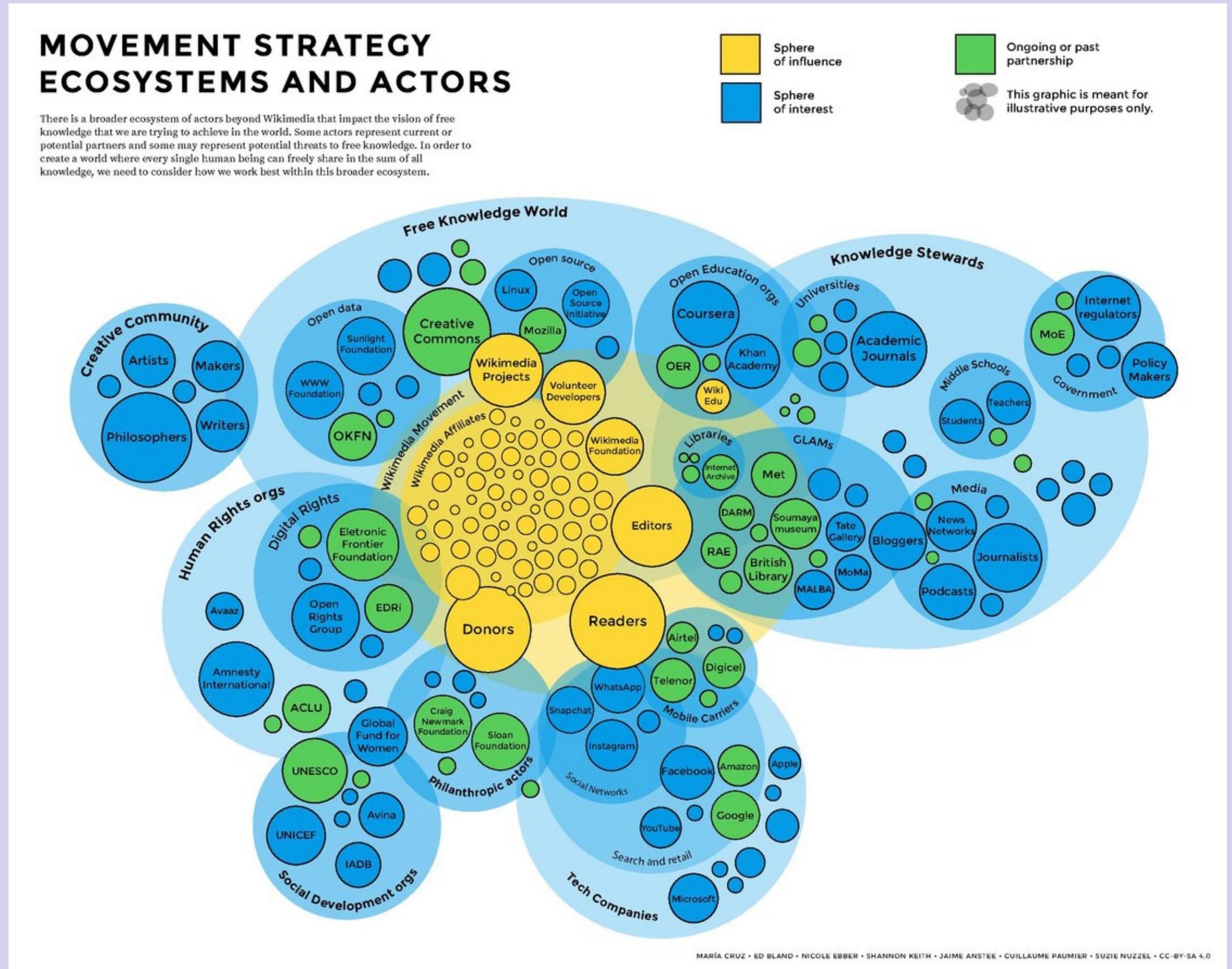




# Structures and systems

How does the Wikimedia Movement's strategy structures and systems currently look like?

More detailed image at:  
[https://commons.wikimedia.org/wiki/File:Strategy\\_Graphic.pdf](https://commons.wikimedia.org/wiki/File:Strategy_Graphic.pdf)



# From the community to the community

In March 2017, the global Wikimedia movement embarked on an unprecedented experiment: they began crafting a 10-year strategic plan together. Out in the open. All conducted through an open, participatory process that brought together hundreds of people from diverse backgrounds.



# What it's made of?

What elements compose the Wikimedia Movement Strategy?

1 strategic direction

1 twin goal

10  
recommendations

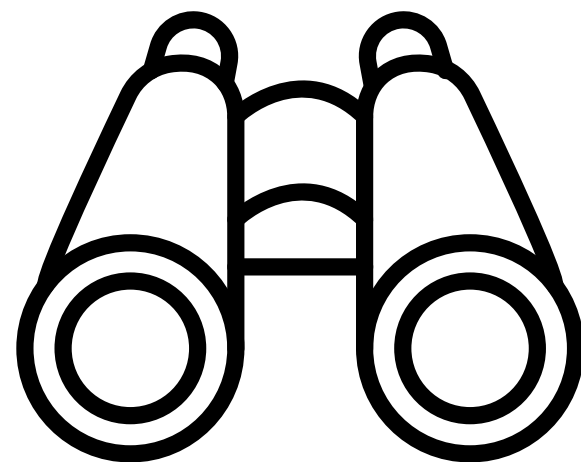
10 principles

40 initiatives



# Strategic direction

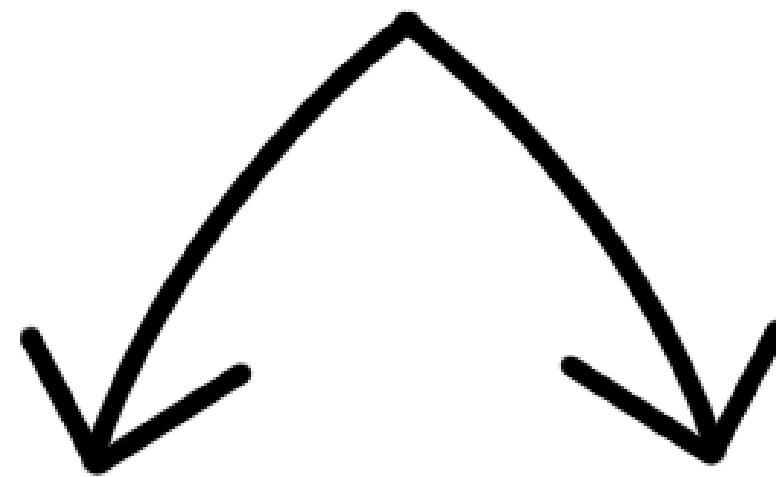
"By 2030, Wikimedia will become the essential infrastructure of the ecosystem of free knowledge, and anyone who shares our vision will be able to join us."







# Twin goal



Knowledge as a service

Equity in Knowledge



# Principles



- People-Centeredness
- Safety and security
- Inclusivity and participatory decision-making
- Equity and empowerment
- Subsidiarity and self-management





- Contextualization
- Collaboration and cooperation
- Transparency and accountability
- Efficiency
- Resilience





# Recommendations

- 
- Increase the sustainability of the Wikimedia Movement
  - Improve user experience
  - Provide for safety and inclusion
  - Ensure equity in decision-making
  - Coordinate across stakeholders

- 
- Invest in skills and leadership development
  - Manage internal knowledge
  - Identify topics for impact
  - Innovate in free knowledge
  - Evaluate, iterate, and adapt



# Initiatives

1. Increase movement sustainability	2. Improve user experience	3. Provide safety and inclusion	4. Ensure equity in decision making	5. Coordinate across stakeholders	7. Manage internal knowledge	9. Innovate in free knowledge
1. Support volunteers	9(a). Platform UX methodology	16. Code of Conduct	22. Movement Charter	28. Living documents to define responsibilities	34. Culture of documentation	39. Identify policy barriers to knowledge equity (notability)
2. Underrepresented communities	9(b). Community engagement for UX	17. Private incident reporting	23. Interim Global Council	29. Better communication & collaboration capacities	35. Movement wide knowledge base	40. Promote experimentation for knowledge equity
3. Increase movement awareness	9(c). Adaptable UX for various devices	18. Baseline of community responsibilities	24. Global Council	30. Technology Council	<b>8. Identify topics for impact</b>	41. Technology, partnerships, formats, devices
4. Revenue and fundraising strategy	10.. Accessibility	19. Safety assessment and execution plan	25. Regional and thematic hubs	<b>6. Skills and leadership development</b>	36(a). Identify impact of Wikimedia projects	<b>10. Evaluate, iterate, adapt</b>
5. Enterprise-level API	11. Newcomer resources	20. Develop local capacity for legal/regulatory advocacy	26. Flexible resource allocation framework	31. Global approach for local skills development	36(b). Identify and track high impact topics	42. Learn and evaluate progress towards strategy
6. Third party ecosystems	12. Peer communication and collaboration spaces	21. Platform mechanisms for safety (anonymization)	27. Guidelines for board functions/governance	32. Leadership development plan	36(c). Misinformation	43. Develop a comprehensive evaluation system
7. Revenue generation for movement	13. Platform functionality and documentation			33. Skills development infrastructure	37. Bridge content gaps	44. Iterate change processes
8. Environmental sustainability	14. Cross-project tool development & reuse				38. Initiatives for underrepresented communities	45. Adaptive policies for structures, budgeting, et al
	15. Partnerships to develop Wikimedia API					

## Wikimedia Movement Strategy

## Summary of recommendations & initiatives

Derived from: [https://meta.wikimedia.org/wiki/Strategy/Wikimedia\\_movement/2018-20/Transition/List\\_of\\_Initiatives](https://meta.wikimedia.org/wiki/Strategy/Wikimedia_movement/2018-20/Transition/List_of_Initiatives)



# What did we learn from the experience?



We have summarized the collective learning from this experience in 4 categories:

- PLANNING
- COLLABORATION
- COMMUNICATION
- PARTICIPATION



# Planning



Participants discussing or participating in discussions during Wikimedia 2030 Harmonization Sprint, 2019 in Tunis, Sailesh Patnaik / CC BY-SA 4.0

WHAT WE LEARNED ABOUT PLANNING WAS THAT TOGETHER WE NEED TO:

- Inspire and align
- Connect strategy to the everyday
- Invest in up-front planning
- Normalize learning



# Inspire and align

Any **open and participatory** process runs on the collective collective enthusiasm and energy. So it is very important to understand people's deeper **motivation**. These are often varied, surprising, and involve different languages and assumptions than we imagine.

Here are some of the diverse reasons for participation that we heard from the community during this process:

Relationships

Gathering diverse perspectives

Learning

Empowering others

Preparing for the future

Empowering emerging communities

Addressing safety and harassment issues

Career development

To have a voice and belonging

Tackling specific challenges

Democratizing information

# Connect strategy to the everyday

Why bother with something as abstract and future-oriented as a "strategy"?

What does it mean to build a strategic plan, and why should the community care?





All of the big current challenges for the Wiki movement tie back to strategy in some way — the Universal Code of Conduct, API, Brand, etc. All of those touch on fundamental questions of who we are, and where we're going.



# Invest in up-front planning

Participants agreed that investing in planning ahead is essential to avoid delays, confusion, and pain later.

One of the tensions in any iterative process is balancing the need for planning, adaptation, and emergence. Being "iterative" doesn't mean that you can't plan; it just means that you need to build regular moments for group reflection, learning, and improvement in the process.

# Normalize learning

Any iterative process thrives on having regular moments to pause, surface learning, and make small improvements together. Scheduling these **reflective practice** (sometimes called "after action reviews," "retrospectives," or "tuning sessions"), and making them a regular, predictable ritual is crucial. Having a regular pause to absorb knowledge was one of the main points cited for planning.

# Collaboration



East African Strategy Summit 2019 in Kampala, Wikimedia  
2030, Movement Strategy. Douglas Ssebagala / CC BY-SA 4.0

- Clarify roles and responsibilities
- Explicit power and decision-making
- Clear working agreements
- Help newcomers
- Use the right tools

# Clarify roles and responsibilities

Clarity about "who does what" was one of the most frequently mentioned points by the participants. A good definition of roles and responsibilities is important not only for the internal organization of a working group, but also for external communication:

For example: who to ask for a certain task?





# Explicit power and decisions

Decision-making is difficult. But avoiding frank discussions about how power and decision-making will work often back-fires later. So:

- Make it clear when you want to consult a participant's opinion or decision.
- It's better to "disagree and commit" than going back and re-opening previous decisions
- Explain why each choice was made.

# Clear working agreements

- Have a dedicated person in the group who focuses on the HOW : team governance, meetings, roles and responsibilities.
- Make the implicit explicit for the team: the culture, principles, and tools.
- Make room for cultural differences. There are many different ways of working. Be empathetic about other people's work, style, and strengths.

# Help newcomers

Dedicating time to training new people and slowing down the pace at the beginning of the project by offering help was cited as a key way to get the work flowing and accelerating in the future.

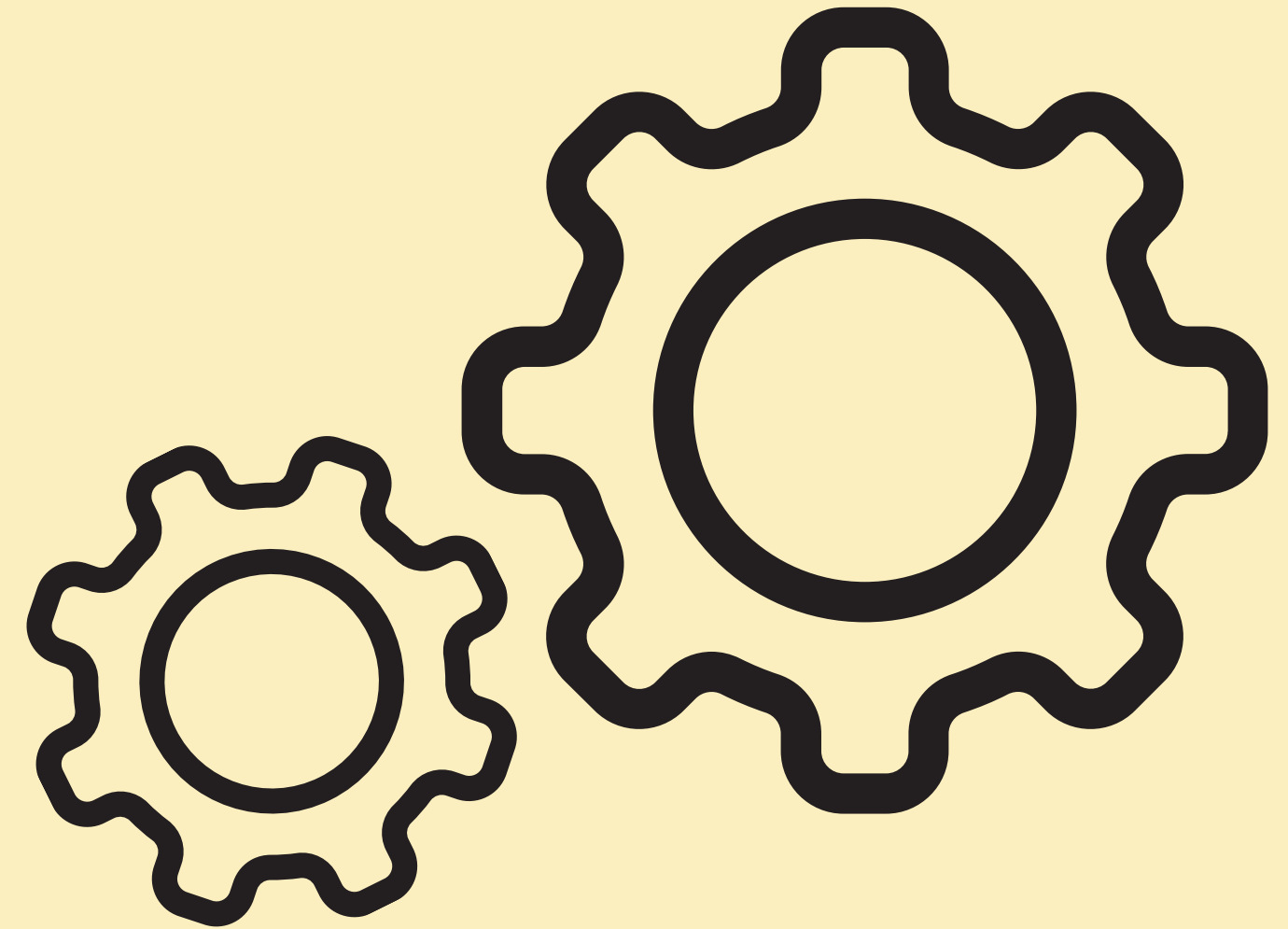
Training and support among wikimedians was cited as a challenge and a necessity by newcomers. It is necessary to introduce people not only to **what** to do, but **how** to do it.



# Use the right tools

**"It can be frustrating to balance the ideals of open teamwork with the realities of bureaucratic processes, systems and tools."**

The use of the right project management collaboration tools to track tasks can dramatically increase group effectiveness, increase asynchronous work, and reduce the need for meetings and e-mails.

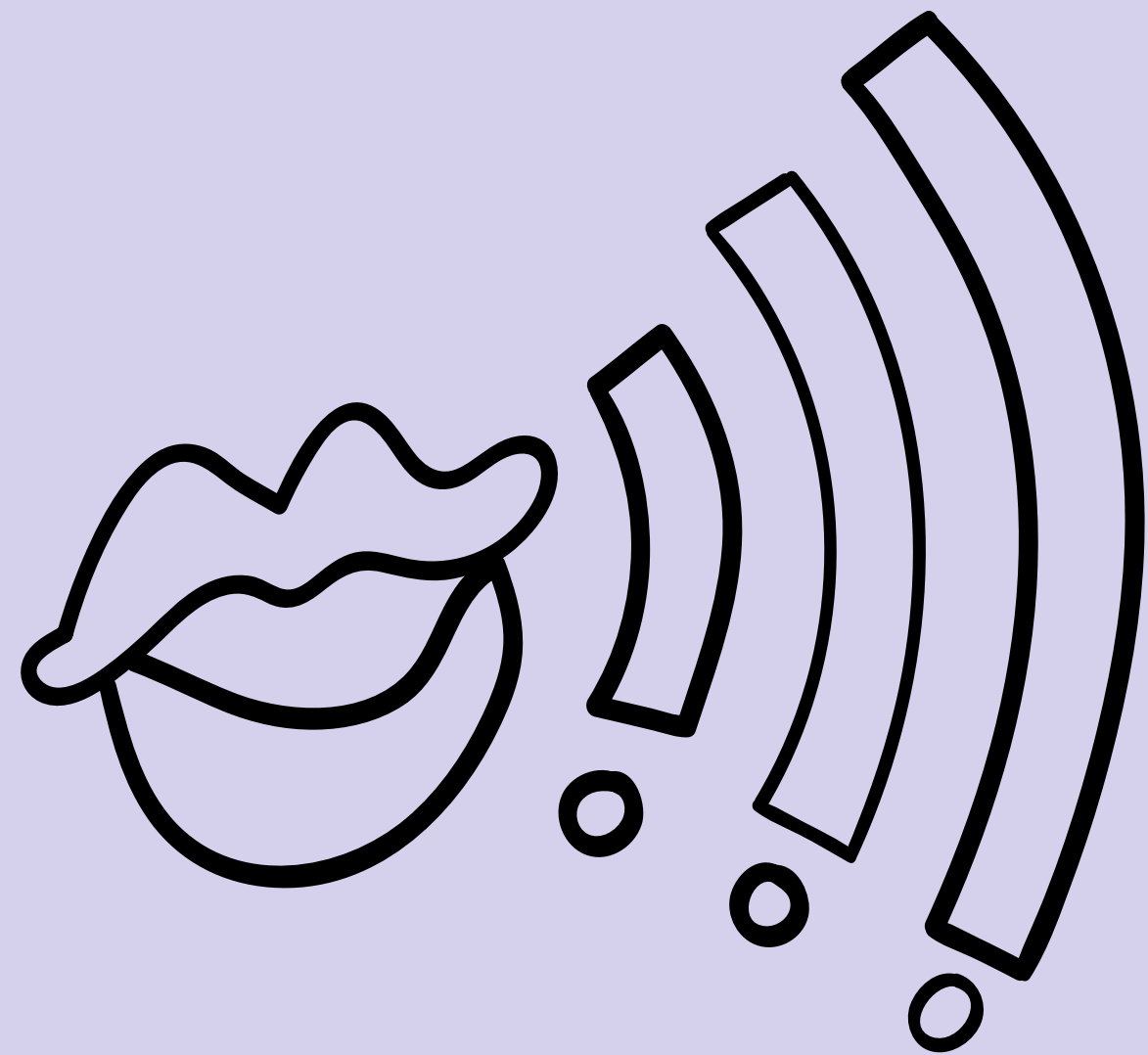




# Communication

- Tell a story, have a strategy
- Connect the dots between projects
- Simplify language
- Make clear asks of participants
- Close the loop: listen and respond





# Tell a story, have a strategy

**How do you tell a clear story with a consistent narrative, given that the pieces and processes in the Wikimedia Movement often change?**

It is important to define in advance what you want to communicate and how often.

The fear of communicating a process that is constantly changing can be solved with predictable cadence communication such as updates and milestones.



# Connect the dots between projects

Communication plays an important role in the community's **understanding about where certain projects begin, end, and intersect.**

Often, for those not involved in a given process it can seem confusing when two projects address similar themes but operate in parallel. This can even lead to frustration and delegitimization on the part of those who cannot see the difference between the works.

# Simplify language

Simplicity can be the key to inclusion. Here are some tips from the participants:

- Use language that is easy to translate into other languages.
- Use visual and audiovisual communication to increase accessibility.
- Publish summaries. Highlight what is most important to specific audiences.

# Make clear asks of participants

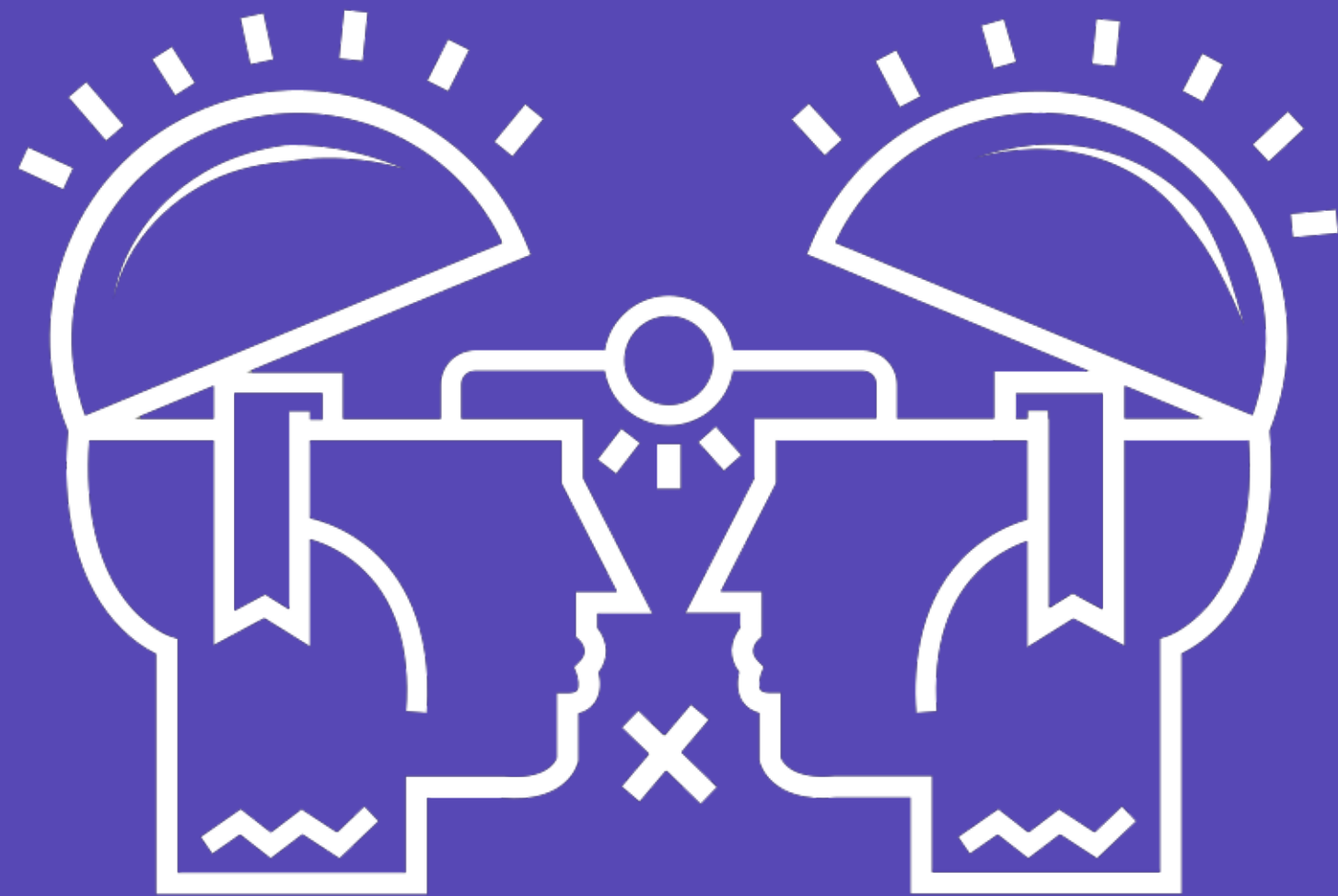
Asking for general feedback in a wide open way like "What do you think?" may seem more inclusive, – but it can often end up frustrating or failing to make the best use of your participants' time. Be specific in your calls to action or requests for advice, and be clear about how it will impact a specific outcome or end result.

It is also important to know **when** people prefer to be consulted and explain **how** this feedback can impact the final results.





# Close the loop: listen and respond



After getting feedback from the community, it is important to be systematic about those comments, and create a cycle of listening and responding in a way that makes people feel heard and with a greater understanding of how we will act on the responses and opinions they have shared.

In addition, it is important to make a triage and know what to respond to and what to ignore according to each goal.



# Participation



- Reduce barriers
- Trust and safety
- Empower liaisons and working groups
- Reduce financial obstacles
- Decentralize decision-making
- Celebrate success
- Publish a “how-to” manual



# Reduce barriers

People don't participate in the same way. There are quiet voices, not just those who can speak loudest. Being inclusive means considering the diverse contexts of the participants and working to **reduce barriers to participation**.

Some of these barriers may be: language, time availability, time zone, access to travel, access to the Internet or technologies, training or experience in the Wikimedia Movement.

# Trust and safety

Working in the Wikimedia Movement can be very personal for much of the volunteering. It can also often be emotional and invisible. This makes criticism hard to take.

That is why it is very important to have **tools for interpersonal work** and a **code of conduct** to establish and set boundaries. It is necessary to prioritize the trust and psychological safety of the people involved.



# Empower liaisons and working groups

Everyone we talked to agreed that using liaisons and working groups was a successful prototype, and that it should be continued to serve as a model for other projects. They also identified the need for improvement and a more systematic approach to performing their roles. The need to bring an organized structure to the decentralized movement was cited.



# Reduce financial obstacles

Financial and administrative tasks and operations are key to diversity and inclusion.

One of the key lessons from this process is that diverse and inclusive participation is closely tied to policies in operations and administration-in areas such as travel policy, how people are reimbursed for expenses, and access to resources. Supporting diversity and inclusion often requires pointing out the hidden barriers in these areas in order to address them.

Diverse hiring practices

Update the reimbursement process

Expand and simplify micro-grants

Expand methods of payment

New models for compensation



# Decentralize decision-making

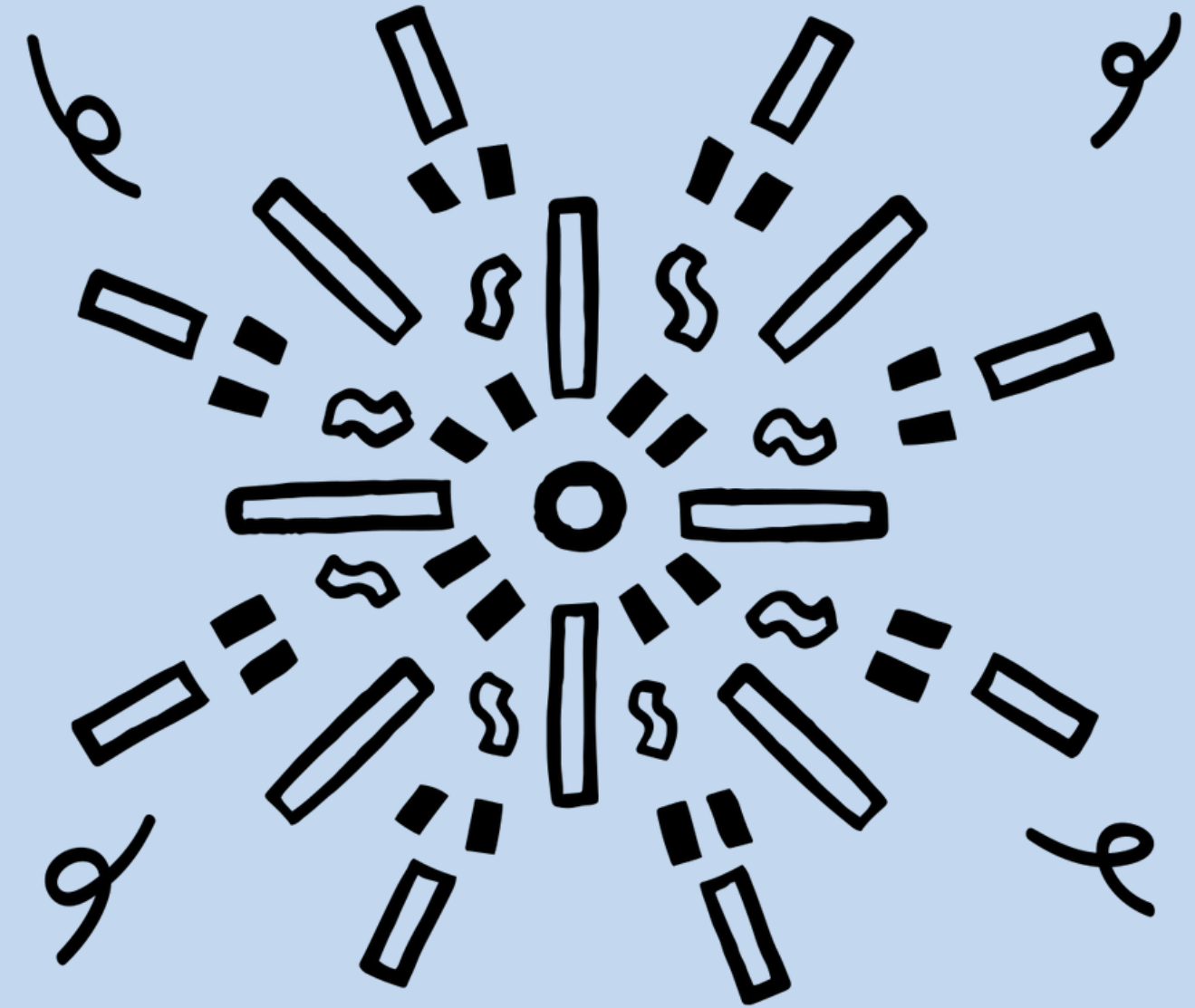
During the experience, there was widespread sentiment from participants that the Wikimedia Movement has historically been composed of movements isolated from each other. And that having greater collaboration and a more holistic view of the whole is vital.

To do this, the global movement needs to look at regions that have not been heard much before, such as Asia, Africa and South America.



# Celebrate success

Throughout the the experience, Movement Strategy participants have shared the many ways in which this work has impacted them. Hearing success stories can also be a strategy for maintaining engagement and motivation during the process.





# Publish a “how-to” manual

This presentation is based on the Movement Strategy Playbook which can be found on Commons by [File:Movement Strategy Playbook.pdf](#)

The Playbook is intended to be a guide to working better together, and a living document that adds more practical materials on this topic. Likewise, any community work can be turned into a manual to help and inspire others.



This presentation was written, produced and translated by volunteer Flavia Doria (user: XenoF) with the support of the Wikimedia Foundation, through a grant from the implementation of the Movement Strategy.

The fonts used were Montserrat Extra Bold and Montserrat Classic. The colors used follow the Brand recommendation on the Meta-Wiki.

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