

Tuning Session Movement Strategy



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MTP Priority slides



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Movement Strategy



Overview

Movement Strategy puts forward structural changes needed to move towards the Strategic Direction and Recommendations across the movement. It contributes to the Thriving Movement MTP priority.

Progress and Challenges

In Q4 the focus of Movement Strategy has been the Movement Charter, considered the cornerstone of the MS process. Discussion about next steps was stalled, and we contributed a well-received proposal to form the Drafting Committee.

Beyond Movement Charter, formal organization of implementation was basically paused. We launched a first call for MS Implementation Grants limited to small proposals to support research and planning, which received a mild response. Independently, some progress was made as part of the Wikimedia Foundation Annual Plan process, where some programs approved were aligned with strategy recommendations, just as some affiliates continue to push forward larger initiatives on their own. The main challenge is to resume movement conversations and start the mapping and organized implementation of initiatives beyond the Movement Charter.



OKRs

| | |
|--------------------------|--------|
| Continued engagement | Yellow |
| Movement Charter | Red |
| Implementation ecosystem | Red |

Actions

- Transfer of the Movement Strategy team from the Office of the ED to Legal department completed
- Building consensus across the movement to get the Movement Charter process going
- First call for Movement Strategy Implementation Grants

OKR slides



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Continued engagement



Objective:

MS stakeholders continuously engaged in implementation conversations throughout Q4 FY20/21

In midst of internal transition of the Movement Strategy team, the interaction with the communities reduced in the end of Q3 FY20/21. As a result, it was a priority to re-establish continuous communication regarding the Movement Strategy and its next steps.

During May, we established a routine of weekly / bi-weekly updates translated into at least 5 languages. For Wikimedia Foundation teams, we were available to provide any support during the Annual Plan Process.

We set up the first call for Movement Strategy Implementation Grants, limited to proposals to support research and planning up to \$2,000 USD. The deadline of the call was extended from June 15 to July 15. Conversations about implementation of initiatives beyond the Movement Charter were postponed, in part to keep the focus on the MC, in part because of the dependency on our Annual Plan, which was announced in mid-July.

Target quarter for completion: Q4 FY20-21



Continued engagement



Key Results

| | Year Goal | Q1 Status | Q2 Status | Q3 Status | Q4 Status |
|--|--------------------------------|-----------|-----------|-----------|--|
| <p>Updates with clear process overview and engagement opportunities delivered to stakeholder groups with a maximum of monthly cadence in at least 5 languages</p> <p>Baseline: Varying cadence, only English</p> | Monthly cadence 5 languages | - | - | - | Weekly / bi-weekly 6 languages |
| <p><i>At least 25 movement groups and all community-facing Foundation departments engaged in MS implementation conversations</i></p> <p>Baseline: 95 affiliates, 53 projects, and 9 WMF departments engaged in transition</p> | 25 groups 5 departments | - | - | - | - |
| <p><i>At least 10 movement groups from emerging Wikimedia communities received funding to continue MS implementation related discussions</i></p> <p>Baseline: 7 grants to emerging communities awarded in the last round</p> | 10 groups | - | - | - | 0 Department: Legal |



Movement Charter



Objective:

Movement Charter Drafting Committee representative of diversity of movement groups and expertise set up by the end of Q4 FY20/21

Creating the Movement Charter Drafting Committee has been our main priority. We converged diverse community proposals and discussions happening on different platforms (e.g. regional calls, SWAN meetings) to a central space on Meta-Wiki, supported by global conversations and Telegram conversation facilitated by the team.

Facilitating consensus across the stakeholder groups took a more intense effort than expected. This milestone was generally achieved by the end of the quarter, and we consider it a success. However, this also means that that actual set up of the Drafting Committee will only happen on Q1 FY21-22.

Professional facilitation in Global Conversations ensured that more voices spoke up during the meetings and created the space for listening and understanding different perspectives. Organizing discussions on Telegram prior to the Global Conversations helped identifying contentious points, areas of agreement, and also to better understand the motivations and concerns of many participants.

Target quarter for completion: Q4 FY20-21



Department: Legal

Movement Charter



Key Results

| | Year Goal | Q1 Status | Q2 Status | Q3 Status | Q4 Status |
|---|-----------------------------------|-----------|-----------|-----------|-----------|
| Definition of scope, participation and (s)election criteria for setting up the Movement Charter Drafting Committee Baseline: Undefined scope, no criteria | Defined scope Defined criteria | - | - | - | 90% |
| Announce and socialize the process of (s)elections of Movement Charter Drafting Committee members in at least 5 languages with engagement from <i>at least 50 movement groups</i> Baseline: | 50 groups 5 languages | - | - | - | - |
| Agree on language support and resources for Movement Charter Drafting Committee to widen the pool of potential members Baseline: No agreement regarding support | Agreement | - | - | - | 25% |



Movement Charter



Key Results

| | Year Goal | Q1 Status | Q2 Status | Q3 Status | Q4 Status |
|--|--------------------|-----------|-----------|-----------|-----------|
| Convene the Movement Charter Drafting Committee, representative of diversity of movement groups and needed expertise to develop movement charter | Committee convened | - | - | - | 0% |
| Baseline: No Drafting Committee | | | | | |



Drill Down: Movement Charter

The situation

Outcomes from the Movement Governance discussions (Movement Charter and Global Council) will have a significant impact to the Wikimedia Foundation.

Establishing the Movement Charter Drafting Committee has been pushed back from the end of Q4 FY 20-21 to Q1 FY21-22, which means an overall shift in the timelines of global governance discussions.

The impact

Delays in the MC process mean that the creation of the Global Council and the first Regional and Thematic Hubs is also likely to be delayed.

This will impact our current Annual Plan OKRs, which are based on a more optimistic timeline. It will also impact the dates of the Global Council election, which in turn may affect the organization of Board elections in 2022.



The recommendation

Prepare for ongoing flexibility with the annual OKRs for Movement Strategy based on the evolving scenarios for the Movement Charter and Global Council. We consider “Do it right” more important than “Do it fast,” although we are committed to maintaining momentum.

As Movement Strategy folds into Thriving Movement in the next fiscal year as part of Movement Strategy & Governance, the team will keep awareness high of the ongoing delicate timelines.

Implementation ecosystem



Objective:

The essentials of the implementation ecosystem development covered in Q4 FY20/21

Developing of the implementation ecosystem was generally paused during the quarter. On the Foundation side, there was some progress made independently through the Wikimedia Foundation annual plan process, where different departments committed to projects that contribute to the MS recommendations. Affiliates and individual contributors are also driving forward with measures, but this still lacks the organization we had hoped to see.

There were conversations between the Movement Strategy and Community Resources teams to define our collaboration on MS Implementation Grants. Negotiating the scope of this work and roles and responsibilities between the teams took some time, so finalizing the plan has moved to Q1 FY20-21.

There were challenges related to advancing conversations about implementing initiatives with the affiliates and wider movement. One was the amount of energy invested by volunteers, affiliates, and the MS team on the Movement Charter conversations. The other challenge was the engagement of other Foundation teams, which will be easier as we wrap the last efforts of the 20/21 fiscal year.



Target quarter for completion: Q4 FY20-21

Department: Legal

Implementation ecosystem



Key Results

| | Year Goal | Q1 Status | Q2 Status | Q3 Status | Q4 Status |
|--|--------------------|-----------|-----------|-----------|-----------|
| Define clearly the new role and the scope of the Movement Strategy team Baseline: Role not defined | Definition of role | - | - | - | 75% |
| Provide a virtual space to continue conversations and define clear roles and responsibilities regarding priority initiatives Baseline: Transition space with initiative clusters | Virtual space | - | - | - | 0% |
| Have <i>at least 25 movement groups</i> participating in the conversations of implementing MS initiatives Baseline: No concrete implementation discussions held | 25 groups | - | - | - | ? |



Implementation ecosystem



Key Results

Develop a clear plan for the next steps of regional and thematic hubs conversations with the participation of *at least 25 movement groups* and *all community-facing WMF departments*

Baseline: No clear plan, some discussions during the transition phase

| Year Goal | Q1 Status | Q2 Status | Q3 Status | Q4 Status |
|--------------------|-----------|-----------|-----------|-----------|
| Committee convened | - | - | - | 0% |



Drill Down: Implementation ecosystem



The situation

Development of movement wide implementation ecosystem has stalled in Q4 FY20-21, because the focus went to Movement Charter as the MS team was reorganized following executive transition.

Even though Movement Charter conversations have moved forward, there is some anxiety in the communities regarding the future of other initiatives.

The impact

The Wikimedia Foundation has approved its Annual Plan for FY 21-22, which includes several programs that are aligned with the MS recommendations. Affiliates look forward to also integrate implementation programs during their usual planning cycles. As long as there is no clear mechanisms for implementation ecosystem in place, there is a high risk of confusion, redundancies or unnecessary competition.



The recommendation

One of our annual goals for 21/22 is to build out the implementation framework envisioned in this fiscal year. We recommend expanding the Movement Strategy team with a strategist and program manager to assist with coordinating this work and keeping it strategically aligned.

Appendix



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Acronyms

APP: Annual Planning Process

ED: Executive Director

F&A: Finance and Administration department

FY: Fiscal year

MC: Movement Charter

MS: Movement Strategy

MTP: Medium Term Plan

Q: Quarter

SWAN: Strategic Wikimedia Affiliates Network

WMF: Wikimedia Foundation

