

# The Partnerships Playbook

Chapter I: In the beginning...



**WIKIMEDIA**  
CONFERENCE

# What is the Partnerships Playbook?

## **Chapter 1 (now!)**

New beginnings: how to establish a new partnership

## **Chapter 2 (Saturday, 2pm)**

Putting it on the road: how to set up the daily business of managing partnerships

## **Chapter 3 (Sunday, 11am)**

Sustainability: Nirvana or Myth when working with partners?



[Lesekreis](#), [Playing with water, light and leaves](#), CC0 1.0

# What we are going to do today

1. Know and speak yourself
2. Learn about environment and players
3. Pitch your idea
4. Establish trust
5. Alignment: having a first conversation
6. Decision-making: now what?
7. Draft an agreement or MOU



# What kind of partnerships are we talking about?

Partnerships are individuals or groups of people working together towards a shared goal, or a joint vision, sometimes based on an agreed upon strategy or a stated collective impact.

Such partnerships are happening within the Wikimedia movement – among affiliates, communities and committees – as well as with external partners such as institutions, organizations, foundations and businesses.

A partnership may involve funding, sharing content, engaging in advocacy, shared outreach, or a combination of these. This definition is intentionally broad and inclusive.

# 1. Know and speak yourself



# 1. Know and speak yourself

Before you go out there to look for and speak to potential partners, you need to do your homework. Part of being a good and interesting partner to have is about being clear on what you stand for and what you are setting out to achieve. This is reflected in the values you hold or the goals you are setting out to achieve - it's all part of your group's/organization's identity.

Important questions to ask yourself:

- Who are we? What do we stand for?
- What are our strengths and weaknesses?
- What are our assets?
- What are our values and culture?
- What do we still want to learn?

**There's a variety of tools to do that:**

- Mission statement
- Identity statement
- [Value statement](#)
- [SWOT-Analysis \(Strengths/Weaknesses/Opportunities/Threats\)](#)

# Mission statement: what should be in it

**“What do we do?”** — The mission statement should clearly outline the main purpose of the organisation, and what they do.

**“How do we do it?”** — It should also mention how one plans on achieving the mission statement.

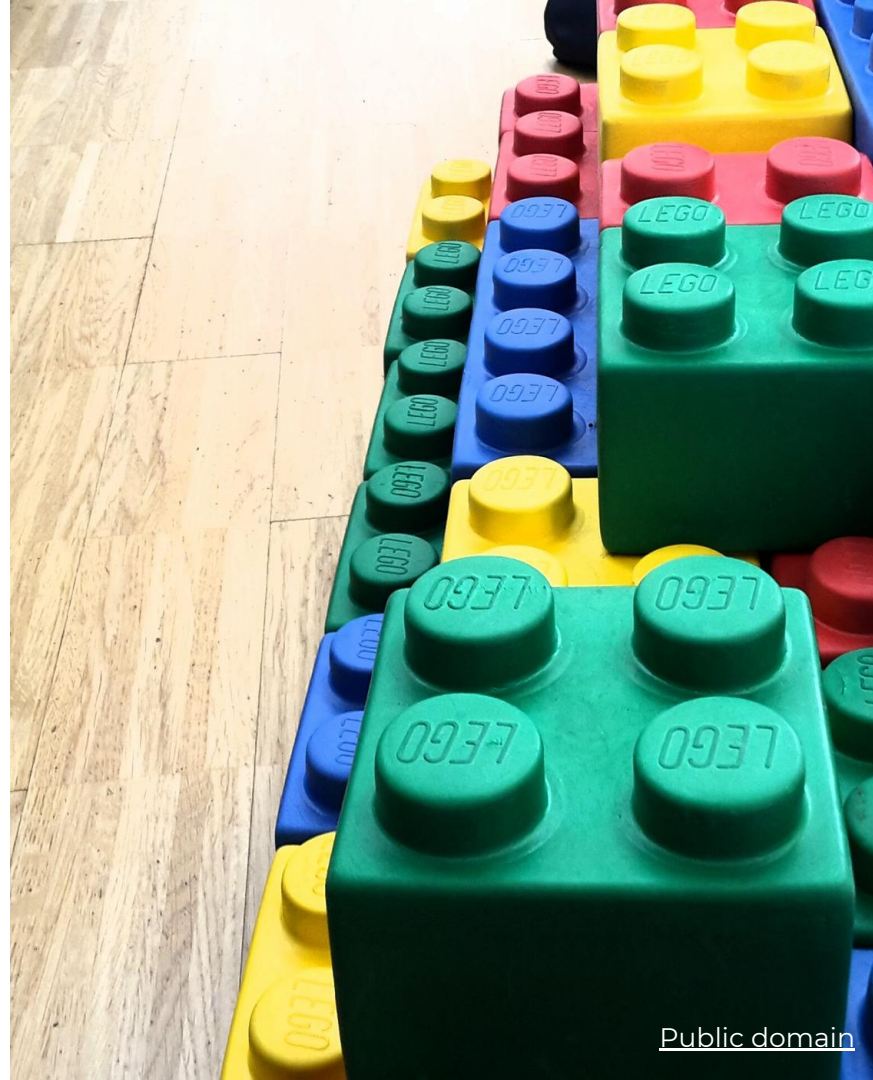
**“Whom do we do it for?”** — The audience of the mission statement should be clearly stated within the mission statement.

**“What value are we bringing?”** — The benefits and values of the mission statement should be clearly outlined.



# Mission statement: how it should be written

- **Understandable:** try to capture the essence of your group in as few and simple words as possible
- **Informative:** it should communicate the essence of what the organization does without being overly specific
- **Memorable:** use descriptive words that can inspire action
- **Achievable:** it should be something that is possible for you to work on







**Now, we would like  
you  
to get to work!**

(exercise!)



**Please have a look at your  
mission statement!**

**Do you have one yet?  
Can you find it quickly?**



## WIKIMEDIA BOTSWANA

### Missions:

To create a platform of OPEN sharing and distribution of knowledge using Wikipedia tools.

### Our Vision

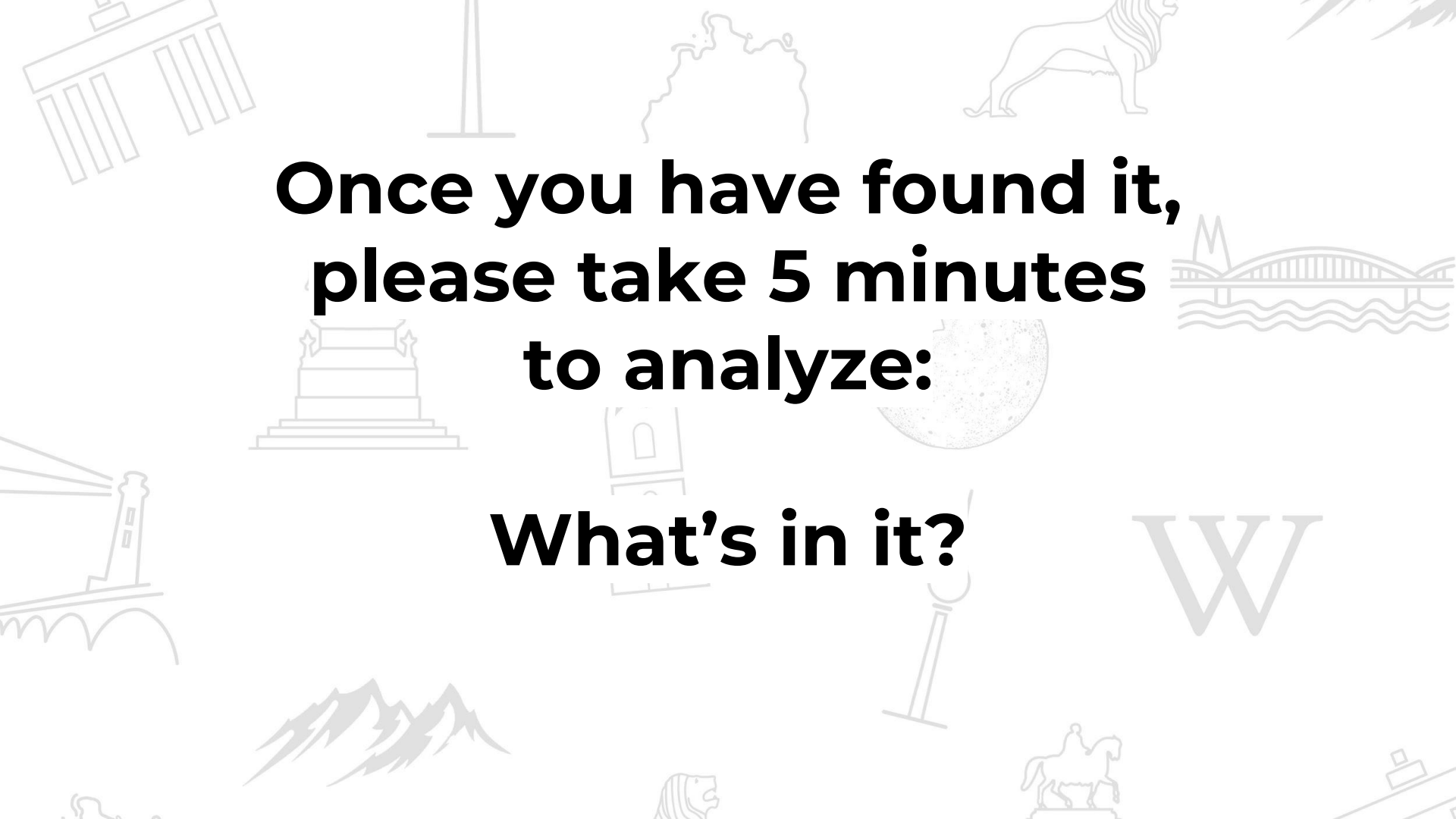
Imagine the world in which every single human being can freely share in the sum of all human knowledge. That is our commitment.

### Contact Us:

71568599

Wikimedia Botswana  
Wikipedia Wednesdays





**Once you have found it,  
please take 5 minutes  
to analyze:**

**What's in it?**

# Mission statement: what should be in it

**“What do we do?”** — The mission statement should clearly outline the main purpose of the organisation, and what they do.

**“How do we do it?”** — It should also mention how one plans on achieving the mission statement.

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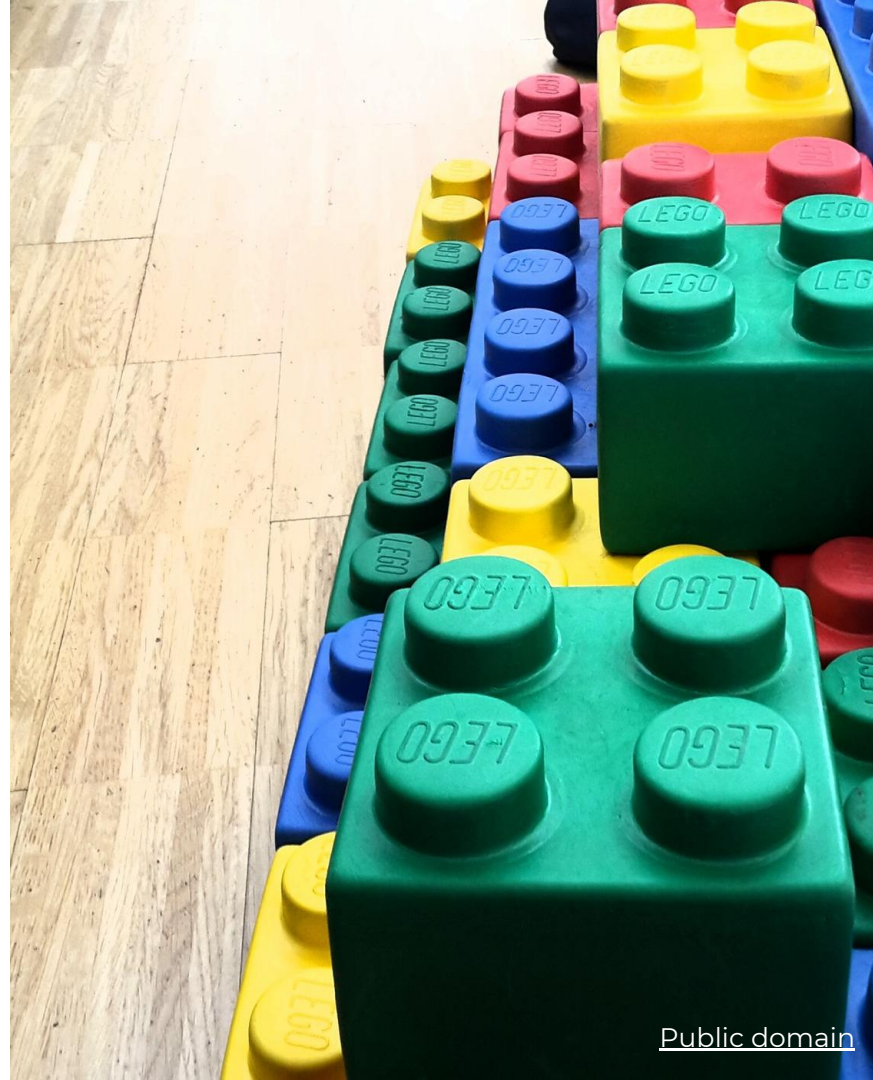
**Now, please take  
5 minutes  
to analyze:**

**How is it written?**

W

# Mission statement: how it should be written

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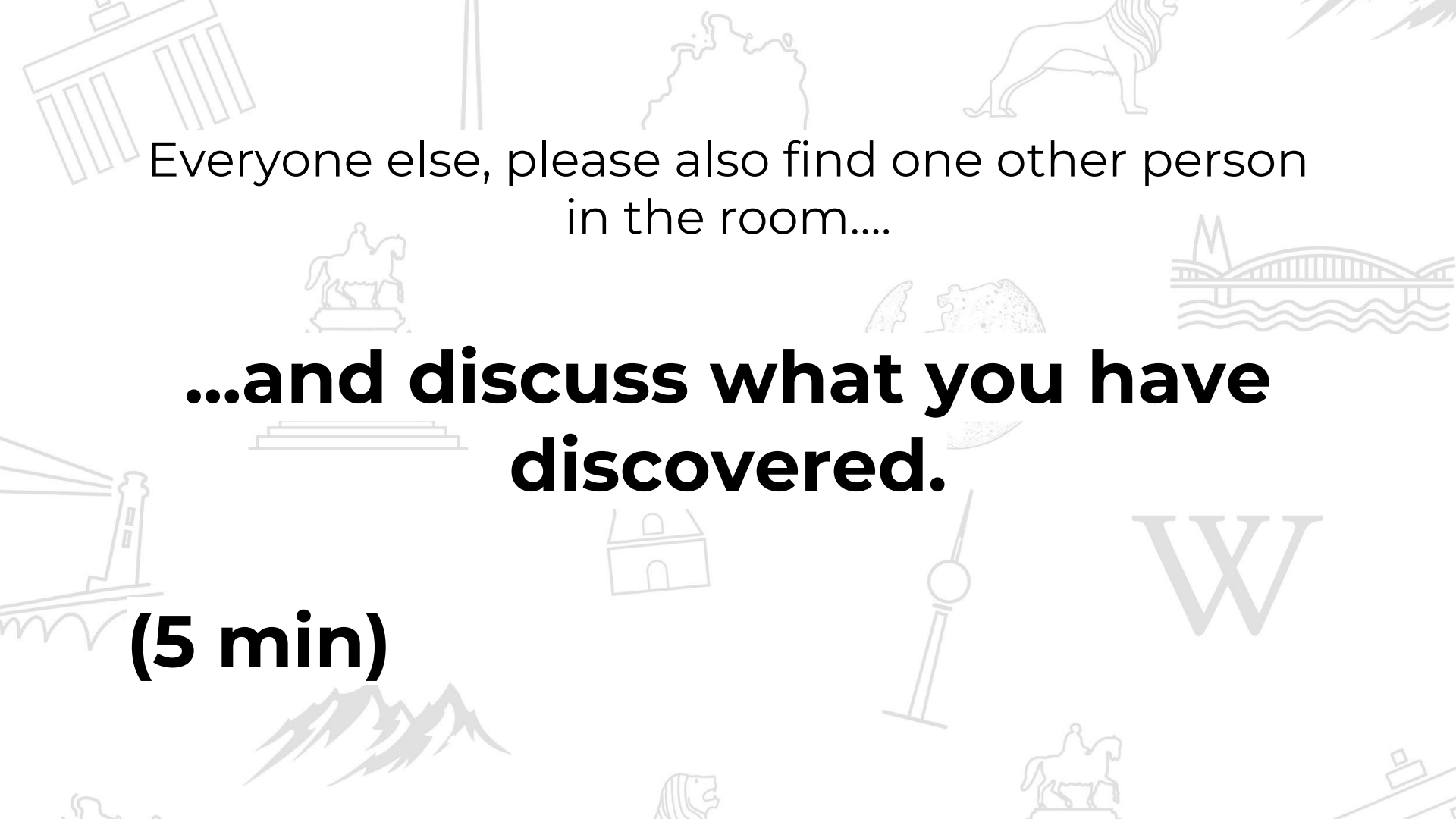




**Now, please raise your hand if  
you worked on the WMF  
mission statement.**

**If you did, please find another  
person who did not...**





Everyone else, please also find one other person  
in the room....

**...and discuss what you have  
discovered.**

**(5 min)**



## 2. Learn about environment and players

## 2. Learn about environment and players

Before approaching any partner, it is important to learn about the different stakeholders in your regional or thematic context.

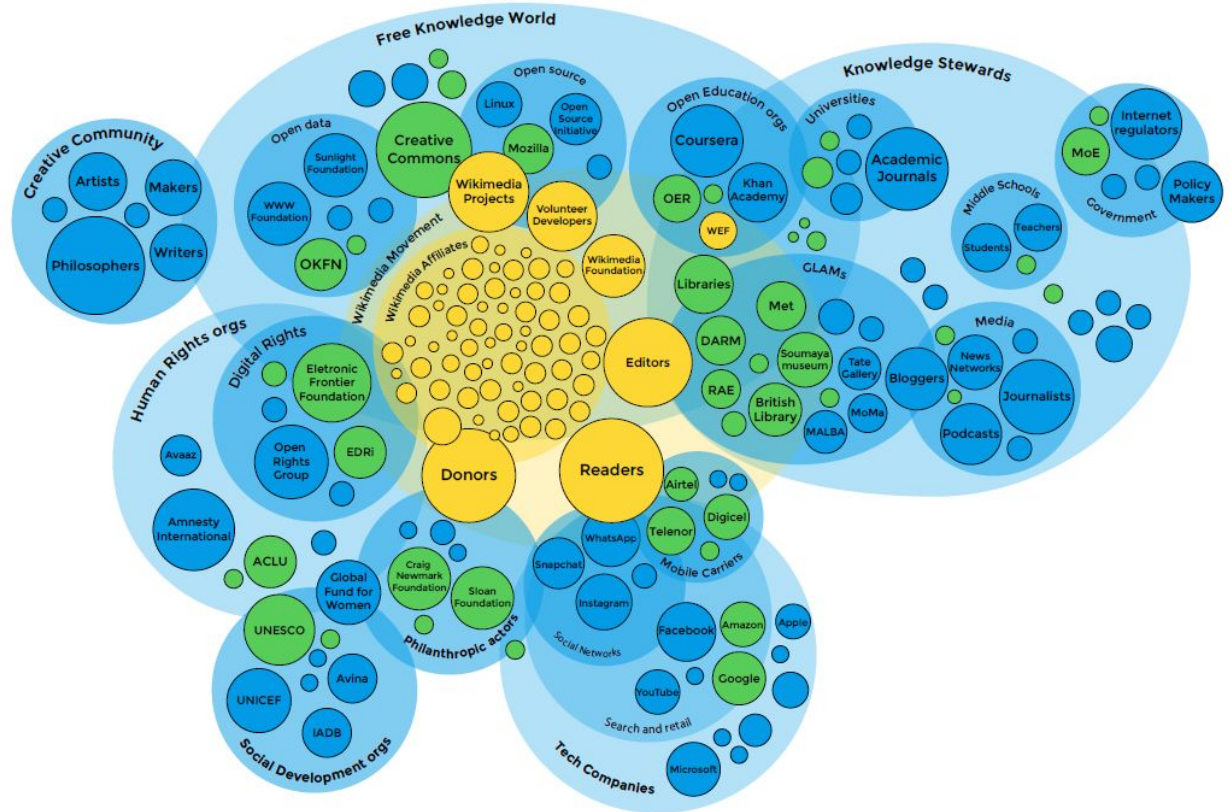
Questions to ask:

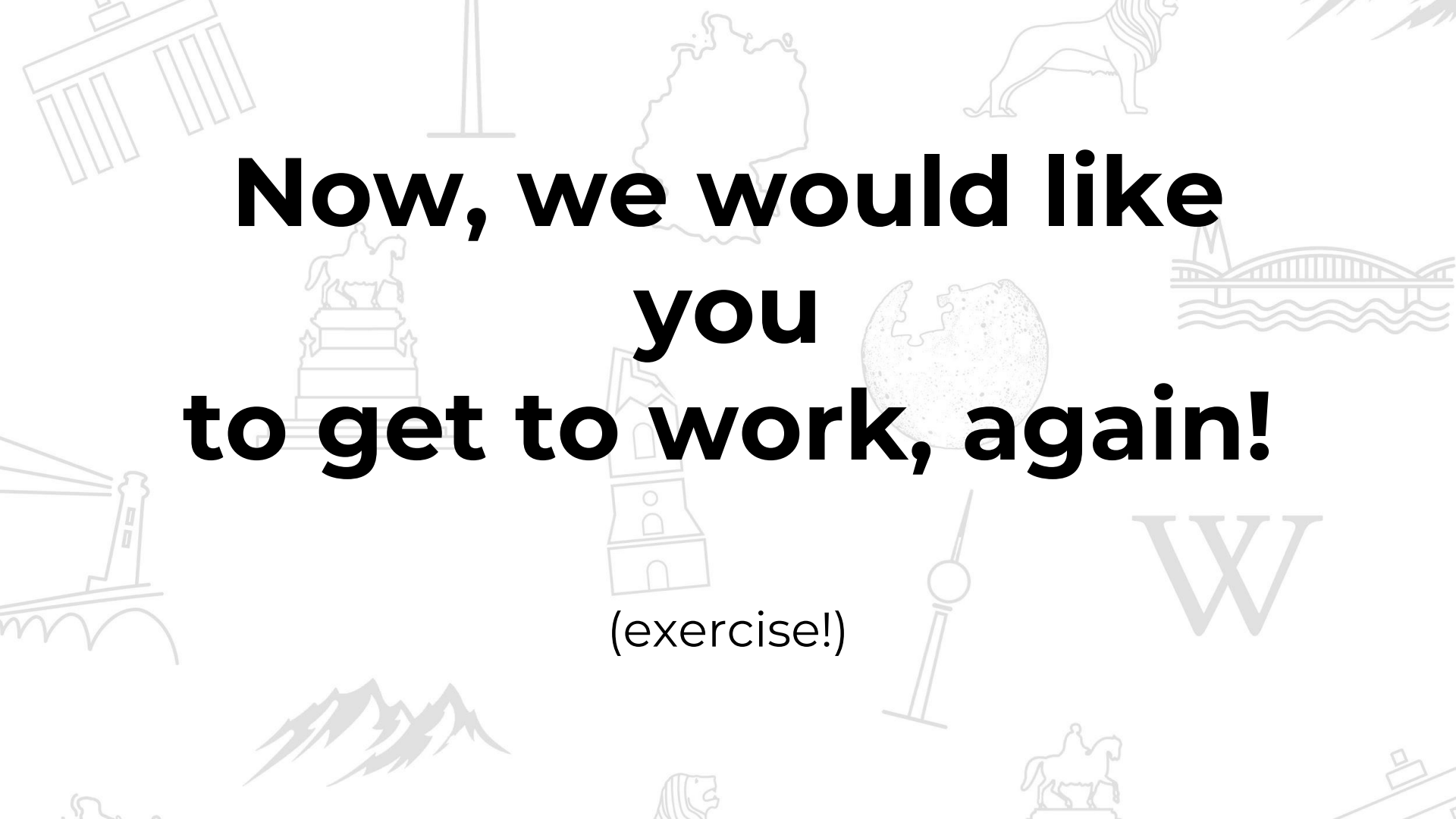
- Who is out there affecting our mission, our work?
- Who are our existing allies? Who might be allies?
- Who needs to still be convinced?
- Who are our antagonists?
- What kind of partners are we looking for?

**There's a variety of tools to do that:**

- Stakeholder Map
- [Stakeholder Analysis](#)
- Environmental and Trend analysis

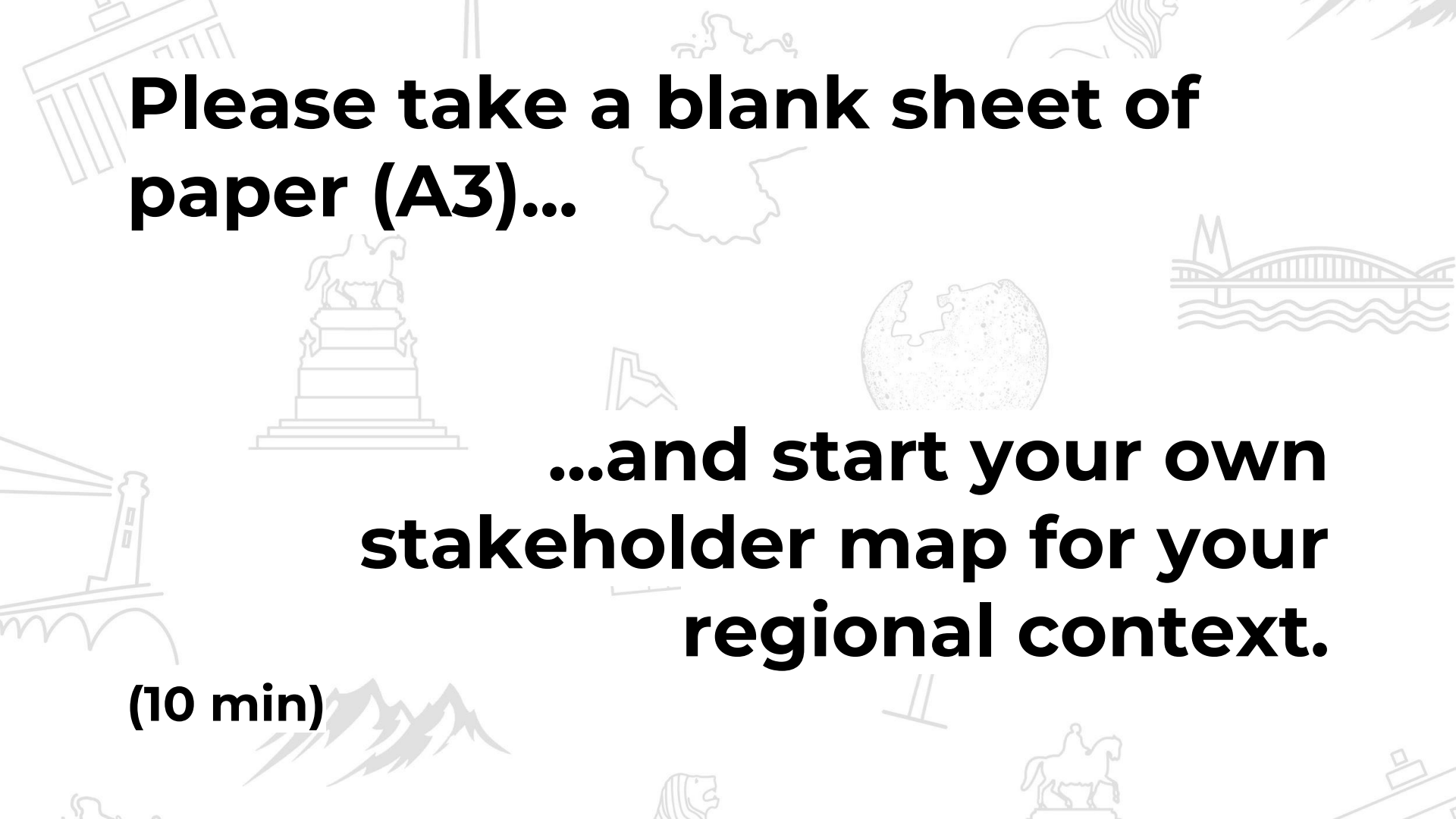
# Example of a stakeholder map





**Now, we would like  
you  
to get to work, again!**

(exercise!)



**Please take a blank sheet of  
paper (A3)...**

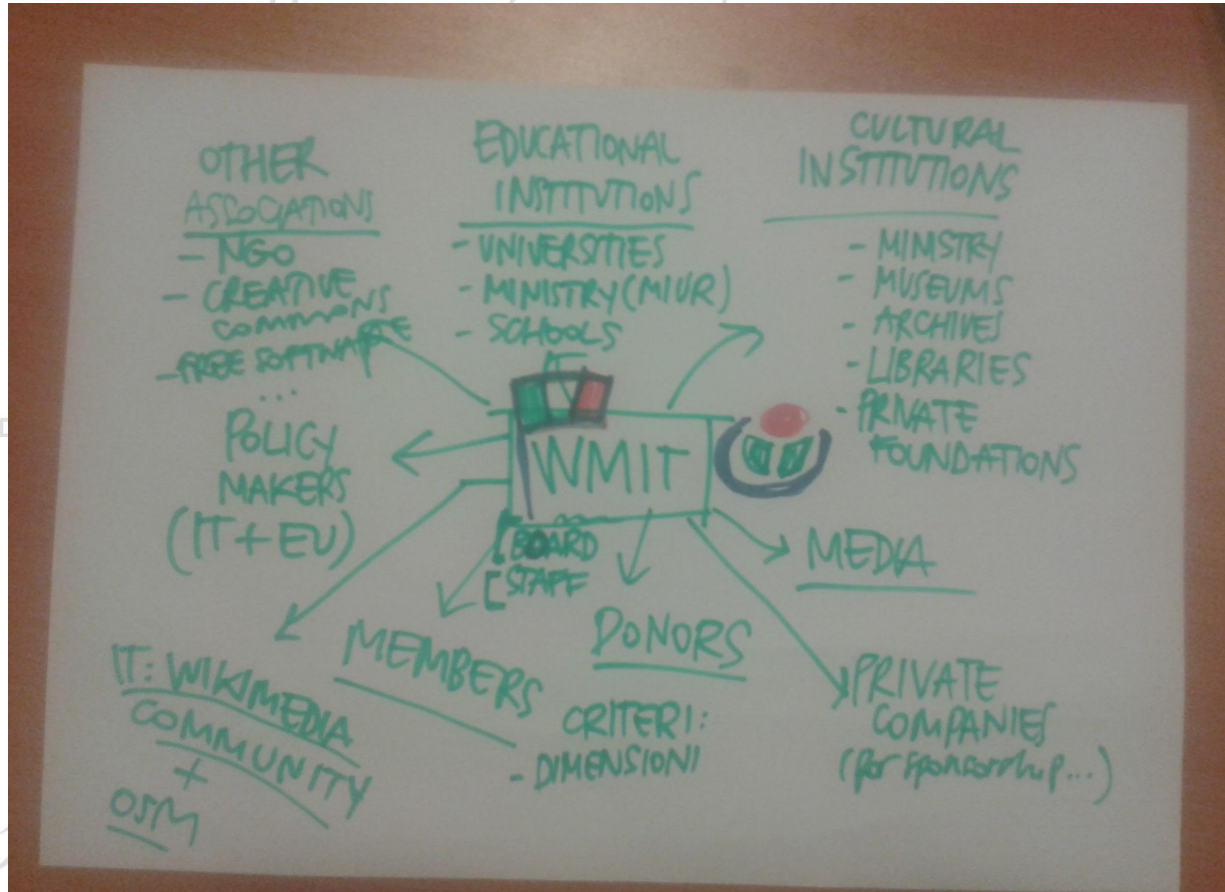
**...and start your own  
stakeholder map for your  
regional context.**

**(10 min)**

# Documentation



# Documentation





# Stakeholder analysis: from stakeholders to partners

Now that you have a great map, the question remains:

## How to identify potential partners?

It can be helpful to develop criteria for selecting the right partners that are fitting for your local context.

You can do this together with your team, your board or other important stakeholders (e.g. members, community).





**Now, please find 2 other  
people to work with...**

**...and brainstorm criteria that  
you could use to identify good  
potential partners.**

**(10 min)**



**What are some criteria  
that you discussed?**

# Documentation: Criteria for identifying good potential partners

- Have concrete implications
- Have staff time available
- Have capacity for cooperation
- Have potential financial help available
- Technical conditions to work with
- Have available resources such as venue, internet, refreshments, child care
- Be willing to share their materials
- Be willing to use open licenses
- Enthusiastic and motivated staff
- Willingness to learn and help promote events
- Shouldn't involve advertisement
- Interested Wikimedia available to work with
- Missions should match
- Have clear benefits and reachable goals
- Provide expertise
- Is clear about potential benefits
- Helps chapter to achieve its mission
- Has potential for scalability
- Does not involve major legal risks
- Has potential for impact
- Fitting to ongoing programs
- Being able to work and talk with the right people

# 3. Pitch your idea to potential partners



# 3. Pitch your idea to potential partners

Having your pitch down for a project is an essential condition for getting everything: partners, funding, or support from the community.

You can use the basic principles of pitching your idea for anything: a grant application, your next meeting with a new partner or the next opening party of the new museum.

You should have your pitch down verbally, and possibly even in a written format that looks professional (e.g. 2 page project brief).



Public domain

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# Important questions to be answered

Who are you? What is our mission?  
Why am I talking to you?

What is the problem we are trying to solve? What could solutions look like?

What is the value added by Wikimedia?  
What is the value added by the partner?

What is the goal of the project? What do we want to achieve?

Why should the partner care to join your project?  
What's the benefit for them?

What are you asking from the partner? [e.g. a call, meeting, letter]





**Now, we would like  
you  
to get to work, again!**

(exercise!)





**We are going to work  
on your elevator pitch!**

What the heck is that?



# **Scenario:**

**You are at the opening reception  
of a local art gallery.**

**You see that the head of  
[insert potential partner institution]  
is standing just two feet away from you.**

**You go over to pitch your  
amazing new project idea!**



**You now have  
10 minutes to draft a short  
pitch...**

**...then you have exactly  
1:30 minutes  
to pitch your idea.**

You will be asked to come to the front!

# Make sure you got these covered!

Who are you? What is our mission?  
Why am I talking to you?

What is the problem we are trying to solve? What could solutions look like?

What is the value added by Wikimedia?  
What is the value added by the partner?

What is the goal of the project? What do we want to achieve?

Why should the partner care to join your project?  
What's the benefit for them?

What are you asking from the partner? [e.g. a call, meeting, letter)





**Time is up!**

**Who wants to pitch  
their idea?**



**We will hear 5 pitches  
and then share some  
insights as a group.**



**What worked well?**

**What could be improved?**

# Documentation

## What worked well?

- Identify organization
- Use statistics
- State problem and solution
- Mention Wikipedia
- Mention benefits of working together
- Make partner feel unique
- Use peer-pressure and mention other organizations which is already doing it
- Giving out business cards

## What could be improved?

- Too much wiki can be confusing
- Don't look rushed but be calm
- Take into account the situation the person is in
- Ask what people are working on



# 4. Alignment - how do we fit together?



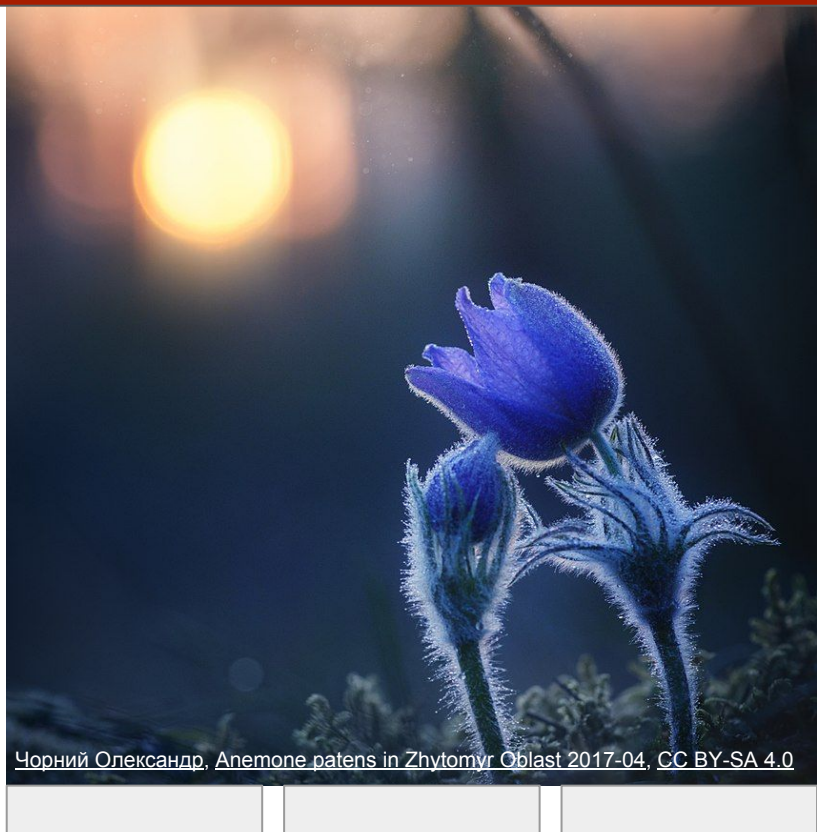
## 4. Alignment - how do we fit together?

Once you have found a potential new partner and that partner is also interested in collaborating with you, it's important to ask yourself:

**Do our values, mission and goals in this partnership align, or not?**

This means:

You should also be clear what goals you want to achieve with this partnership!



Чорний Олександр, *Anemone patens* in Zhytomyr Oblast 2017-04, CC BY-SA 4.0

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# First meeting

Generally, it is easiest to figure out how two partners fit together in a joint meeting.

The initial meeting can usually have an informal structure like this:

- Small talk
- Introductions: Mission and vision
- Arguments for collaboration
- Presentation of partner's interests
- Pointing out opportunities for collaboration
- Discussion of potential obstacles
- Reaching agreement / decision on next steps

Source:

[Learning patterns/Towards a Successful GLAM Partnership](#)





# More meetings

A lot of times, after a first meeting, more meetings need to happen.

Why?

- The right people need to sit at the table
- The more you clarify in the beginning, the less confusion happens later on
- Potential risks need to be assessed
- Goals for a new partnership might not be clear right at the beginning
- You want or need to have a written agreement

# Alignment - Important questions to answer

## For any type of partnership

- What is the alignment with our mission and values?
- How does the planned work contribute to our annual plan or strategy?
- Which assets does our organization bring to the partnership?
- Which assets does the partner bring?
- What is the added value created by this partnership?
- What is the joint vision and desired impact on people, systems or policy?
- Which person or department in our organization owns this partnership?
- What is the long-term strategic benefit and what can we learn?

## For all concrete projects

- What is our role? What is the role of the partner?
- What is the cost-benefit ratio?
- How are our communities involved?
- Will content be available under an open license?
- What can and how does the movement learn from this?

## For grant funded activities

- How much can we expect in terms of funding, and over what period?
- Are these funds restricted or unrestricted?
- How much is expected in terms of matching or in-kind resources from us?
- What percentage of overhead does this funding support?
- Are there implications for our tax-exempt/charitable status?

## For major gifts, corporate donations and sponsorships

- Why is the donor interested in supporting us?
- Is there a political risk with this donor?
- What type of recognition and services are expected in return?

# 5. Establish trust



# 5. Establish trust

Trust is an essential criterion for partnership. When you are seeking partners it is vital that you deal with any issues about trust and accountability first. To help establish trust, focus on the ways you can work together and actively seek out any shared values and ways working.

You can do this by...

- Meeting people informally
- Delivering what you promise
- Being open and honest about what you are trying to achieve and about any problems or barriers that exist
- Having no hidden agendas



Bild: rawpixel, CC0

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# 6. Decision-making: now what?



# 6. Decision-making checklist - now what?

You should be able to agree with the following statements (at least!):

- This partnership aligns with our group's/organization's mission
- The new partner brings important assets into the partnership
- The new partnership has clear goals and a clear impact that it strives to achieve
- The partnership brings a clear benefit or development opportunity to our communities and work
- We have the resources (time, money, people) and the buy-in from our group, organization or community to support this partnership during the full duration that is planned
- This partnership is in-line with our charitable status as a non-profit or our agreements with the WMF
- We are clear on the potential political or other risks associated with this partnership
- We are clear on what the partner is expecting from us and what we are expecting from them

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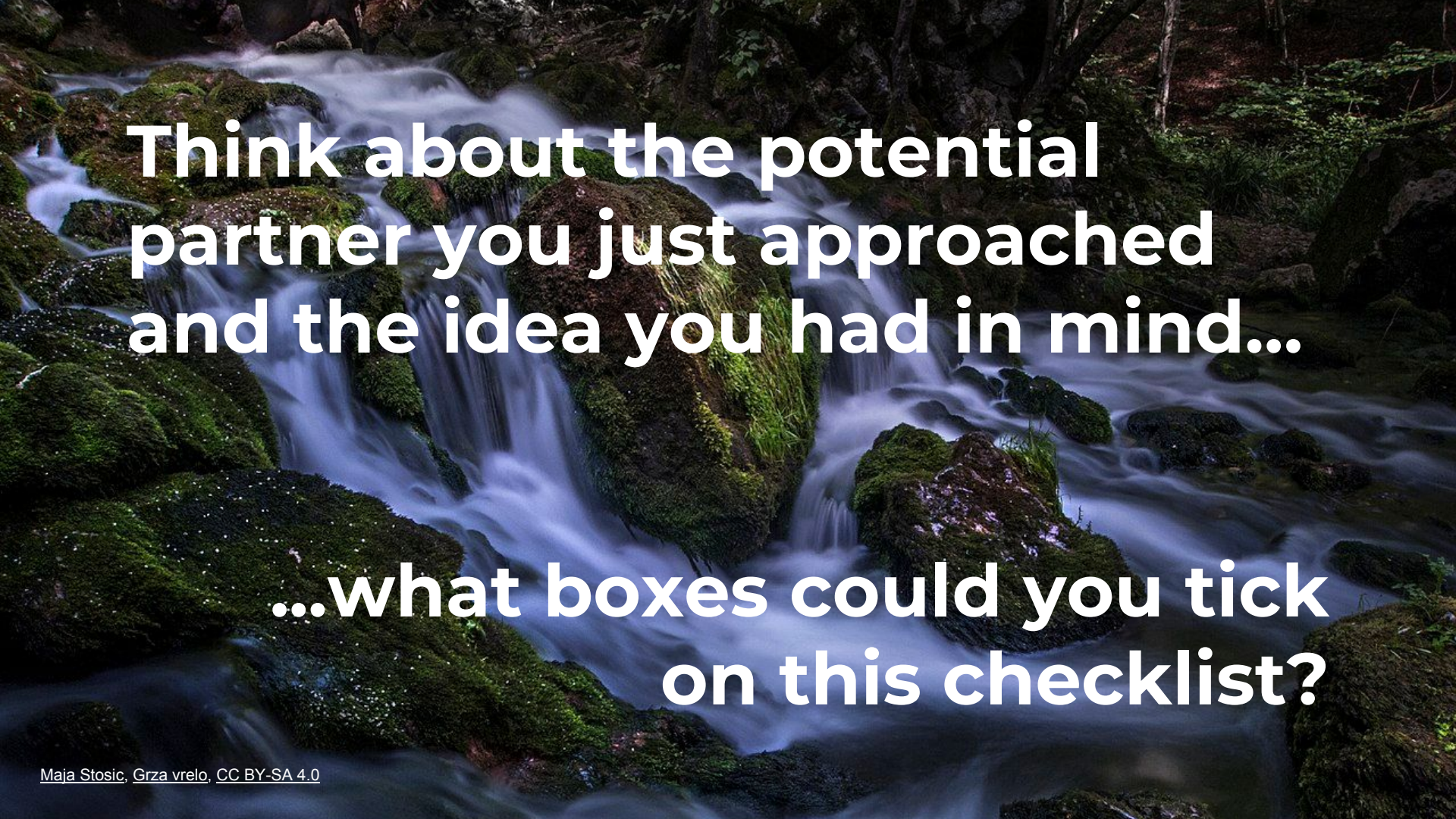
2.

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A long-exposure photograph of a waterfall cascading over mossy rocks in a forest. The water is blurred, creating a soft, ethereal effect. The rocks are covered in vibrant green moss, and the surrounding forest is dense with trees and foliage.

**Think about the potential partner you just approached and the idea you had in mind...**

**...what boxes could you tick on this checklist?**

# 7. Draft an agreement or MOU



# 7. Draft an agreement or MOU

Formal or written agreements, such as a Memorandum of Understanding (MOU), can be a good way to start an official partnership.

A formal agreement can help to:

- Document each party's commitments and contributions
- Provide a legal framework e.g. regarding copyrights or financial transactions
- Set and document expectations from all parties
- Define reporting formats and dates
- Define shared metrics for success

[ZMcCune \(WMF\)](#), [Katherine Maher](#) [Ivan Martinez](#) [Mexican Culture Ministry](#) partnership, CC BY-SA 4.0



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# Agreements/MOU

Drafting a written agreements needs a sufficient amount of time and often the consultation of a local lawyer.

Details of the agreement differ completely, depending on the partnership and the regional context.

Drafting of a written agreement should be done in close communication with all parties involved.



We cannot draft one now!



# Agreements/MOU

[Guide for drafting a Memorandum of Understanding](#)

[Memorandum of understanding sample template](#)

[Memorandum of Understanding between WMIN, on behalf of Global Tamil Wikimedia Community and Tamil Virtual Academy, Chennai](#)



If you have more questions or a particular challenge from writing an MOU, please come to our Peer-Consultation Clinic on Sunday, 2pm - there will be experts who have much experience drafting formal agreements!



# Further resources

[Commons:Guide to content partnerships](#)

[Wikidata:Data Import Hub](#)

[Learning patterns/Towards a Successful GLAM Partnership](#)

[Partnerships: Frameworks for Working Together by Strengthening Nonprofits](#)

[Sample partnership policy by Wikimedia France](#)

**How to get in contact:**

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# Don't miss the following sessions!

- **The Partnerships Playbook: Chapter II - Putting it on the road:** How to set up the daily business of managing partnerships.
  - Saturday 2:00 PM - Britz
- **Partnerships Market: Creating more cross-affiliate partnerships within the movement**
  - Saturday 10:00 AM - Blitz
- **The Partnerships Playbook: Chapter III - Sustainability:** Nirvana or Myth when working with partners?
  - Sunday 11:00 AM - Britz
- **Peer-consultation clinic:** Bring your partnership challenges or questions.
  - Sunday 2:00 PM - Britz