



Strategy, planning and evaluation

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Boards Training Workshop, March 2014

- Presentation: How does the FDC work
- Presentation: SWOT and strategic choices of domain, advantage, goals, programs, mission
- Discussion in groups
- Presentation: Portfolio review
- Discussion: in groups
- Q&As

How does the FDC work?

- All FDC members read all proposals, discussions, and staff evaluations
- Deliberations are held for 3-4 days, 10-12 hours per day
- We start by a blind poll of suggested allocations and can see how the allocations spread (mean, median, average, etc.)
- Even for unanimous cases we discuss them, look for clarifications, most applications are discussed in recurring sessions twice or thrice
- Once everyone shared their concerns and positive views, we move to “gradients of agreement” consensus seeking exercise
- Discussions and gradients of agreement continue until we establish what the most agreeable solution is

SWOT/TOWS approach

External Opportunities (O)

- 1.
- 2.
- 3.
- 4.

External Threats (T)

- 1.
- 2.
- 3.
- 4.

Internal Strengths (S)

- 1.
- 2.
- 3.
- 4.

SO

"Maxi-Maxi" Strategy

Strategies that **use strengths to maximize opportunities.**

ST

"Maxi-Mini" Strategy

Strategies that **use strengths to minimize threats.**

Internal Weaknesses (W)

- 1.
- 2.
- 3.
- 4.

WO

"Mini-Maxi" Strategy

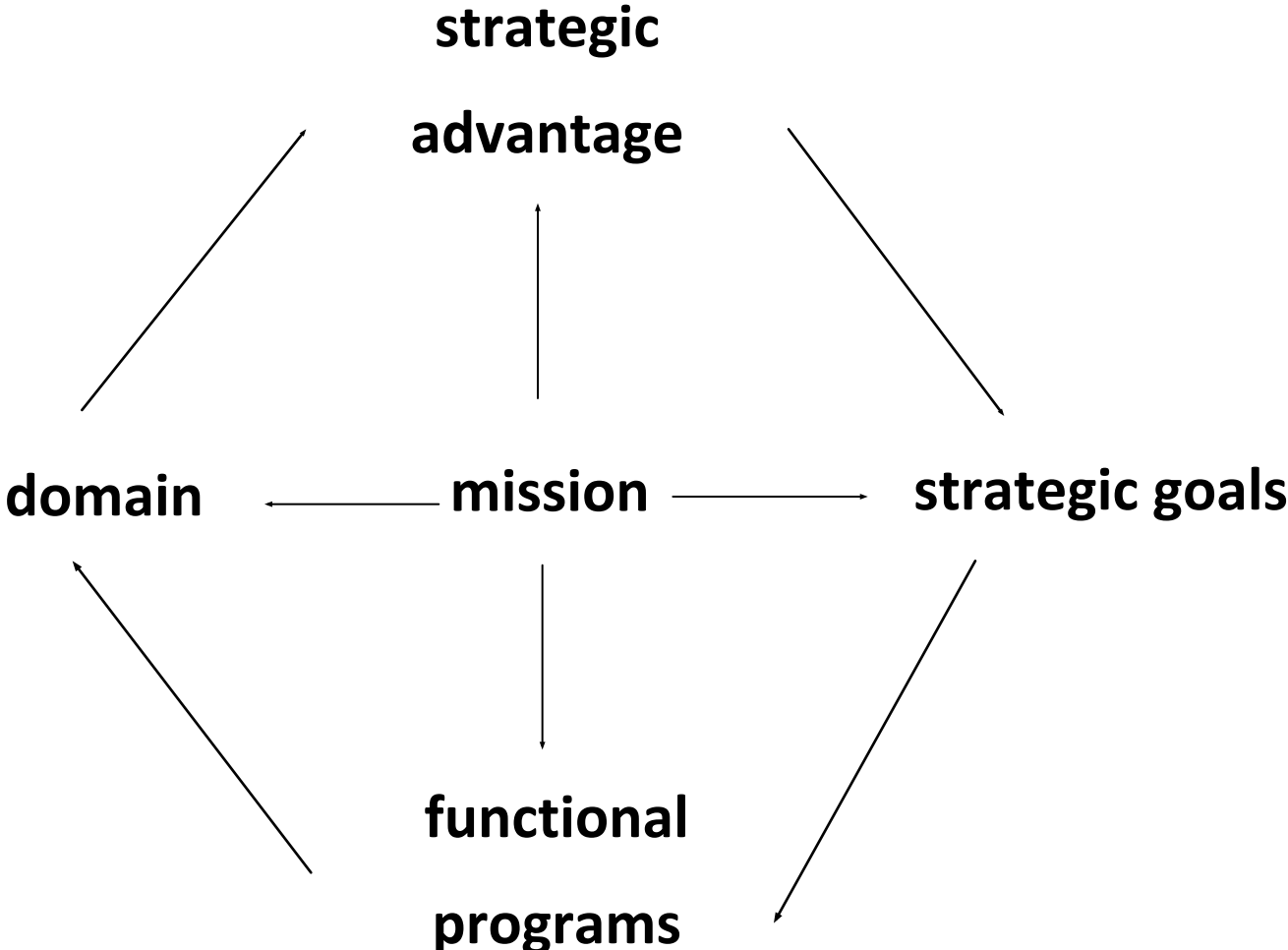
Strategies that **minimize weaknesses by taking advantage of opportunities.**

WT

"Mini-Mini" Strategy

Strategies that **minimize weaknesses and avoid threats.**

strategy: making non-obvious choices between attractive alternatives, through making coherent plans of action, to achieve long-term goals



SMART goals

Specific

Measurable

Attainable

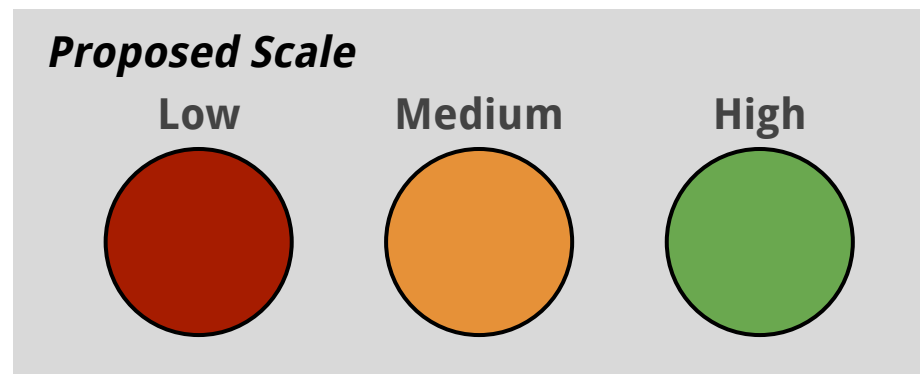
Relevant

Time-bound

Why are these important?

Portfolio Review: key questions

- How aligned is this program in accomplishing one of our strategic goals?
- How large is the impact (and how do you know)?
- Is this program resource-intensive?
- How likely is this project/idea to scale?
- Can you use your unique advantage here?



Portfolio Review: example assessment

Program Name: _____		
Dimensions	Self-rating	Notes / Rationale
Strategy: How aligned is this program in accomplishing one of our strategic goals?		
Impact: How large the impact may be realistically?		
Resource-intensiveness: How much of your resources (money, time, volunteers, bandwidth) does the program take?		
Potential for scale: how likely is this project/program to scale?		
Uniqueness: Are you the organization best aligned for this program (can you use your unique advantage here)?		

Self-rating

Low High

