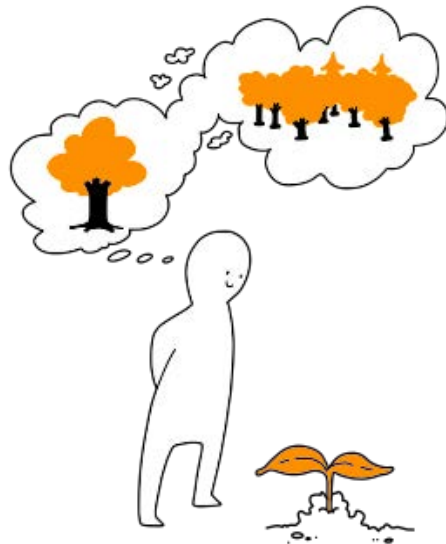THE

MOVEMENT STRATEGY PLAYBOOK

21 ways to do open strategy better together

Lessons learned from Wikimedia's
[2030 Movement Strategy](#) process
(version 1.0)

Foreword

In 2017, the Wikimedia Foundation launched a strategic planning process to identify the future of our free knowledge movement, and a statement of what we would like to achieve by 2030. The Wikipedia vision calls for a world in which all people can participate in the sum of all knowledge. We asked ourselves: what should we do next as a movement in order to reach that aspirational vision?

We knew a traditional approach to strategy would not work for the Wikimedia movement. The answer to our questions would not be found within a business book or a boardroom. Our projects have been created by millions of volunteers over the past two decades; for a strategy to work for Wikimedia, it would have to be consistent with that approach. We would use that same collective intelligence to envision the future of free knowledge, and create not just a renewed strategy for Wikipedia but a renewed vision and alignment for the free knowledge movement.

Throughout 2017 the Wikimedia Foundation led a global movement of volunteers in the largest open global strategy consultation to ever take place. We cast a wide net that brought together our most passionate contributors alongside people who had never heard of Wikipedia. We engaged 2,000 volunteers in 20 languages and more than 50 countries, in dialogue with hundreds of institutions and individual experts, to ask: what is the future of free knowledge?

Together, we produced a series of conversations and insights that would form the basis of a unifying global strategic direction, as well as community-built recommendations for how to get there. The strategic direction we created together is better than what we could have hoped for -- ***To become the essential infrastructure (support system) of free knowledge, and anyone who shares our vision can join us.*** Aspirational but achievable, inclusive of new voices and familiar to veterans, broad enough to be adaptable to different contexts, but specific enough to enable tough decisions.

But even if our statement of direction had been slightly less good, the very process of creating it would have been worth the effort. By putting in the hours and effort, we began a process of transforming our disparate collection of communities into a globally-aligned, unified movement for free knowledge. The dialogues, debates, and the data we collected throughout our long-term planning allowed us to knit together diverse ambition into a shared sense of identity and purpose, engaged by passion and possibility.

In other words, *the process is the product.* By working openly together, we built connections and trust between divergent groups of stakeholders, and were able to unify our movement around a single path forward. Through meetings and events, online consultations and in person salons, we were able to create structured space for fresh voices to be heard and formalize emerging ideas. We engaged diverse groups to cooperatively identify challenges and solutions. Through the movement strategy process, we created an entirely new approach to strategy -- one that is radically open, democratic, and global, transparent and iterative -- a strategy that invited anyone to contribute, all built on the ethos of Wikipedia itself.

This playbook outlines some of the key lessons we've learned throughout this process on how to run an inclusive global strategy from intention to execution. Created through feedback from participants in the movement strategy process as well as the organizing team, we believe it can serve as a guide for community organizers, facilitators, and project managers on how to build a long-term vision for your organization in partnership with your community and key stakeholders. As this playbook shows, the best way to imagine and shape the future you want is to do so together.

Katherine Maher
CEO, Wikimedia Foundation
2014 - 2021

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Strategy work is at a crossroads because conventional perspectives and methods are not enough to meet the demands of today's organizations. In particular, we need new kinds of approaches to connect with internal and external stakeholders — not only to have their voices heard, but to engage them in creative thinking and committed collective action. Such an open strategy approach — which I would call Strategy Work 3.0 – is what this playbook is all about.

In this strategy playbook, we see Wikimedia pioneering something that is not easy to pull off. The key is to understand that transparency, inclusion and commitment do not happen by themselves, but require a lot of work and effort. What is especially valuable is that we are offered a detailed description of the strategy

process that zooms in on the practices, tools and methods used as well as the key learning points. I am also very impressed that strategy formation is linked with implementation, which remains one of the key challenges in any organization.

This is the way Wikimedia does it. We can all learn from it. It does not have to be copying all steps or using the exact same methods, but this playbook is a terrific source of best practices to be used by any kind of organization willing to take an extra step towards more participative, creative and agile strategy work.

Eero Vaara
Professor of Organizations and Impact
University of Oxford

Executive Summary

Beginning in March 2017, the global Wikimedia community worked across 20+ languages, countries, and time zones to draft a 10-year strategy for Wikipedia and the Wikimedia movement. Here's some of what they've learned about imagining and shaping the future together, based on feedback from participants and the team running the process:

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) / [CC BY-SA 4.0](#)

Planning

1. **Inspire and align.** Start with the "why" behind the work. Understand the deeper meaning and motivation for participants.

2. **Connect strategy to the everyday**. Make it real by showing how strategy connects to everyday examples people care about.

3. **Invest in up-front planning.** Slow down at the beginning to go faster later on. Following an agile or open process doesn't mean you "can't plan" — it just changes *how* you plan.

4. **Normalize learning and improvement.** Do regular reflective practice and course correction. Set a cadence for learning and making small improvements as you go.

Day 2 of Wikimedia 2030 Harmonization Sprint, Camelia Boban / CC BY-SA 4.0

Collaboration

5. **Clarify roles and responsibilities.** Publish a team charter or "Human API" so that everyone is clear about roles and knows who to ask for help.

6. **Be explicit about power and decision-making.** Document how a given decision will be made, and whose advice and expertise are needed.

7. **Set clear working agreements.** Be explicit about ways of working. Set agreements for how the group will communicate and get things done.

8. **Help newcomers get on their feet.** Invest time and resources into on-boarding.

9. **Use the right collaboration tools.** Agree on collaboration tools and practices to make managing tasks simpler and more sane.

Wikimedia Strategy Salon in Rajshahi, 2019, [Rocky Masum](#) / [CC BY-SA 4.0](#)

Communication

10. **Tell the story**. Have a communications strategy. Use a predictable cadence for updates and share-outs.

11. **Connect the dots between different projects.** Show how different projects and initiatives connect to the bigger picture.

12. **Simplify language.** Use simple messages designed for translation. Embrace visual communication instead of walls of text.

13. **Make clear asks of participants.** Be specific, instead of vague "requests for feedback."

14. **Close the loop.** Be systematic about listening and responding. Explain how feedback is (or is not) being acted on.

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

Participation

15. **Reduce barriers to participation**. Make life easier for participants in areas like translation, time zones and on-boarding.

16. **Prioritize trust and psychological safety**. Build capacity in cross-cultural communication, facilitation and conflict resolution.

17. **Empower liaisons and working groups**. Strengthen how these roles are recruited and designed.

18. **Reduce financial obstacles**. Reduce barriers in administrative policies related to events, travel, compensation, and reimbursement.

19. **Decentralize decision-making**. Empower others. Build new structures for decision-making across geographies.

20. **Celebrate success**. Make history together. Stay focused on a shared mission and vision

21. **Publish a "how-to" manual.** Publish and continually improve this playbook. Apply lessons learned from *creating* the strategy to help strengthen its implementation.

Context and Overview

Wikimedia Summit 2019 - Group Photo 4, Jason Krüger, /

Shaping the future of knowledge

Beginning 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.

"Collective strategic planning is <u>radical</u>. You have to really mean it."
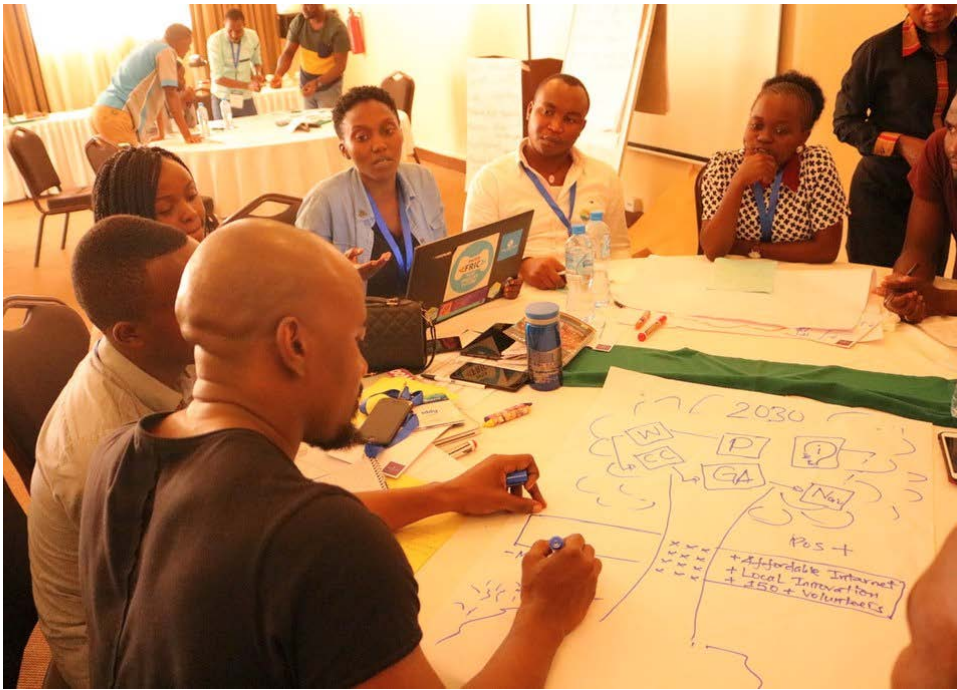
East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy, <u>Douglas Ssebaggala</u> / <u>CC BY-SA 4.0</u>

They succeeded. In May 2020, after more than two years of open discussions, working groups and iterative drafting, participants successfully shipped <u>10 key strategic recommendations</u> that will shape the future of Wikipedia and the Wikimedia Movement.

This was a remarkable victory for the movement given its scale and decentralized nature. The process was orchestrated by the Strategy team, first consulting <u>'Working Groups'</u> with members from across the movement, then getting liaisons onboard. All the while, this process was an open conversation with the community where anyone could contribute.

The recommendations touch on everything from how money and power will be

distributed, to improving user experience on the platform, to prioritizing knowledge equity and inclusion.

Creating a Strategic Direction	Creating Recommendations for change	Transitioning towards Implementation	Implementing the Recommendations
2017	2018-2020	2020	2021 →

Graphic from '[2030 Strategy](#)'

Gathering lessons learned

As the strategic plan moves into implementation, it's an opportunity for us to look back at our global collaboration and share some of our key lessons learned. This playbook is aimed at outlining some of those key practices and mindsets, based on what we learned from the process of creating a strategic direction and recommendations.

The content is drawn from group discussions and interviews with hundreds of different participants in the [Movement Strategy Process](#) hosted between May and June 2020.
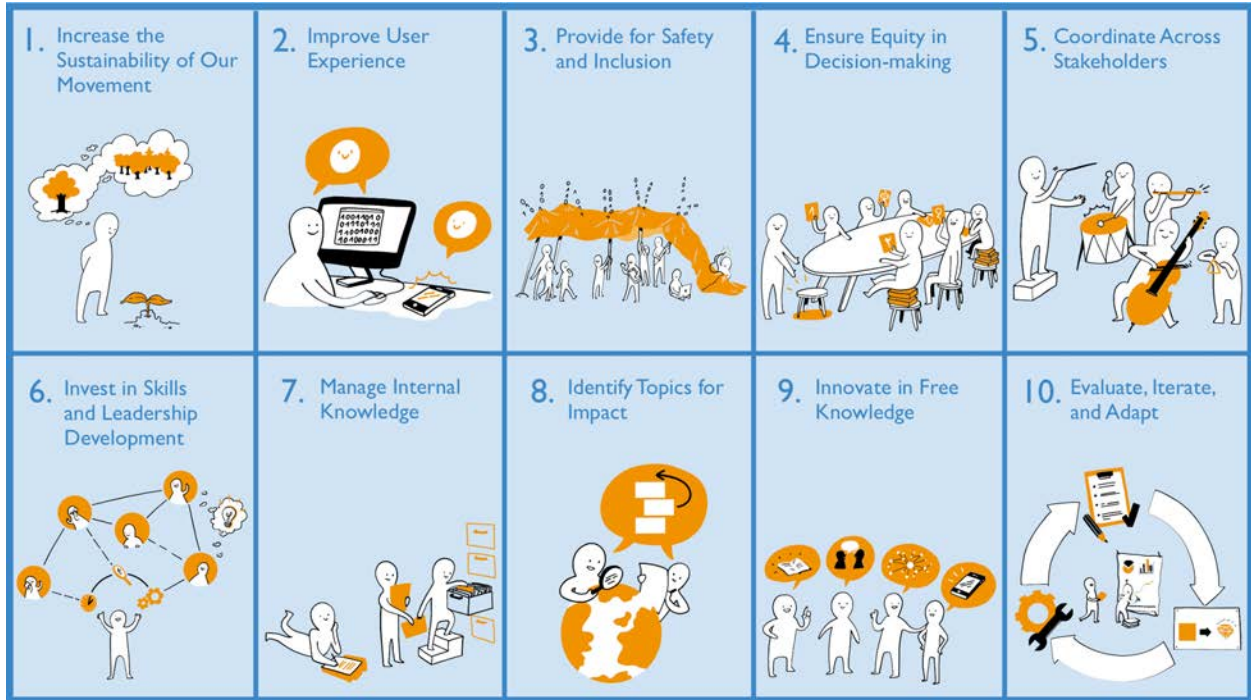
Wikimedia 2030 Movement Strategy Recommendations

The focus of the retrospectives was: *"What went well? What could have gone better? And how can we improve?"* Participants were invited to share their individual reflections in writing, then synthesize and discuss their answers together to help surface recommendations. Together these discussions generated more than 300 pages of feedback, which has been edited down into this report. The group discussions were facilitated by Matt Thompson, who also edited this initial draft.

To encourage candor and psychological safety, participants' feedback was anonymous, and has not been attributed. Instead, quotes from multiple individuals have been grouped together into shared themes and a collective voice. Our hope is that the participants' words speak for themselves, and that this report does justice to the rich insights we received from them.
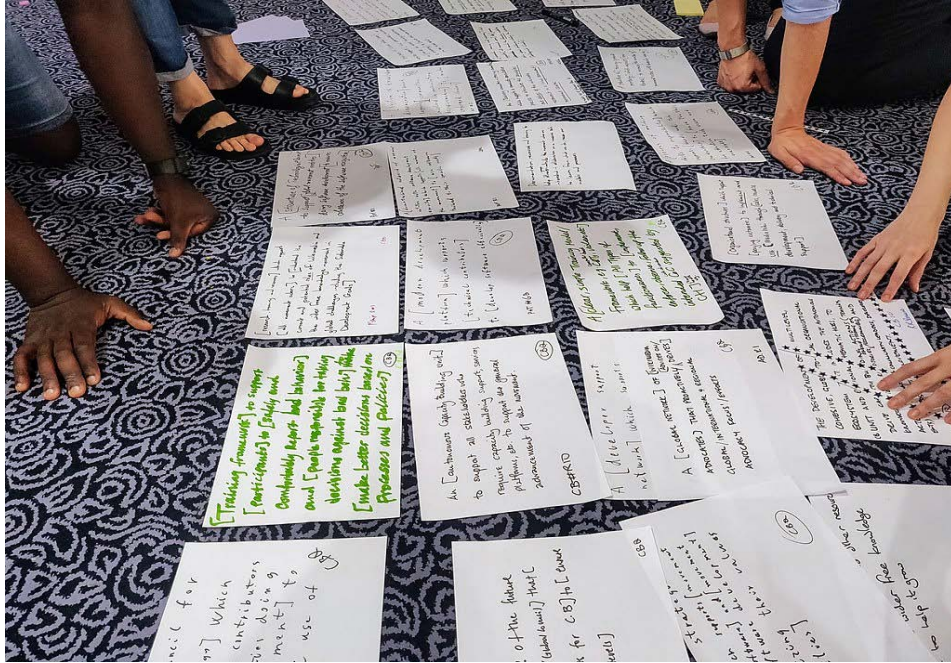
Day 2 of Wikimedia 2030 Harmonization Sprint, [Camelia Boban](#) / [CC BY-SA 4.0](#)

Who we spoke with:
- [Movement Strategy Core Team](#)
  - "The Core Team was responsible for advancing the Wikimedia 2030 Movement Strategy Process, its operations, logistics, and focus. This team was made up largely from members of the broader Wikimedia movement, featuring a mix of people who worked for the Wikimedia Foundation or for Wikimedia Deutschland." ([/Strategy core team](#))
  - The Core Team included; Nicole Ebber, Kaarel Vaidla, Bhavesh Patel, Jodi McMurray, Mehrdad Pourzaki, Tanveer Hasan, Abbad Diraneyya, Kelsi Stine-Rowe, Anna Rees, Ellie McMillan
- [Working Group members](#)
  - "In July 2018, 90 members from our global community formed into nine Working Groups. . .Each Working Group. . .dedicated itself to one of nine key thematic areas of the movement, which members were putting under the microscope, exploring how it could look in 2030 and finalizing a set of guiding questions." ([/Working Groups](#))
- [Strategy Liaisons](#)

- ○ "[A] point of contact for the Core Team and the Working Groups. . .act[ing] as a bridge between organized groups and the overall Movement Strategy Process" ([/Organizational Strategy Liaisons](#))
- Community representatives
- Wikimedia Foundation Executive Director (Katherine Maher)
- Wikimedia Foundation Chief of Staff (Ryan Merkley)
- Wikimedia Deutschland Executive Director (Abraham Taherivand)

Key Themes we explored:
- Process Design
- Community and Volunteer Engagement
- Working as a distributed global team
- Communications
- Knowledge Management
- Operational Infrastructure

What we learned

We've synthesized all the feedback we received into 21 lessons across 4 categories; Planning, Collaboration, Communication, Participation. This document can be read from top to bottom, but that isn't necessary. Feel free to use the contents (or meta-wiki navigation) to skip to the category or lesson that would be most helpful for you, your community or organization.

1. Inspire and align

"**You have to really mean it.**

You have to see the value in bringing more people into the conversation."

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) / [CC BY-SA 4.0](#)

Any open, participatory process runs on the collective enthusiasm and energy of its participants -- so it's vital to understand participants' deeper motivation and reasons for participating. These are often varied, surprising, and wrapped in different language and assumptions than your own.

What motivates people to participate?

Some of the diverse reasons for participating we heard from Movement Strategy participants:

- **Relationships**. *"To work with amazing people who are all so committed to Wikimedia."*

- **Learning.** *"To get new inspiration and to learn."*

- **Gathering diverse perspectives.** *"Bringing together people from different modes of Wikimedia activity and locations."*

- **Empowering others.** *"Rewarding hard-working volunteers, by transitioning to a career in the Movement or other forms of empowerment."*

- **Preparing for the future.** *"In 2030, who knows what the internet will look like, or if Wikipedia will still be as relevant as it is today?"*

- **Addressing safety and harassment issues.** *"I was motivated by the experience of harassment from other Wikipedians/ Wikimedians."*

- **Empowering emerging communities.** *"It feels like small / emerging African communities are often left behind in the Wikimedia Foundation in areas like decision making and policy-making."*

- **Career development.** *"I became involved because of the opportunity to build myself professionally. I started off as an editor, and the user group gave me the opportunity to learn fast."*

- **Voice and belonging.** *"In Tanzania, [movement strategy was a chance to] participate and give our own opinions about how we want things to be. Our voice can be heard."*

- **Tackling specific challenges.** *"There are a lot of things not covered in the mainstream papers — in LGBTQ communities, for example, or African-American issues. Things that would not qualify for current English rules for eligibility on Wikipedia. I want to find ways to navigate around that."*

- **Democratizing information.** *"[Wikipedia] is one of the most democratized platforms for information in the world right now."*

The desire to create a true movement, versus disconnected parts

Many participants spoke to the opportunity of making Wikimedia a true "movement" in a meaningful sense, rather than just a loose collection of parts.

- *"We call ourselves a movement, but really right now we're a hodgepodge or collection of communities. We share a similar mission, but are not super connected across countries and languages and projects.*

- *"Having a common strategy and structural reforms could move us towards connecting globally, sharing capacities and supporting peers across the globe. To me that was such a fascinating vision."*

2. Connect strategy to the everyday

"*You need to build relevance and influence, and* **make strategy tangible to the day to day work.**"

Day 3 of Wikimedia 2030 Harmonization Sprint, Camelia Boban / CC BY-SA 4.0

Why bother with something as abstract and future-oriented as "strategy?" What does building a strategic plan even mean, and why should busy participants care? These were questions we often heard from participants -- even though strategic

questions and decisions are fundamental to many of the movement's current tensions and opportunities.

- *"We often heard: "why should I bother with 'strategy'? This is at such a high level!" Most of our online communities are there to drive the online work forward; they don't necessarily feel they need strategy to do that."*

- *"When you think about it, 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."*

- *"One of the big takeaways for me from this process is: you can do 'strategy' without ever even using the word "strategy!" You need to meet people where they are."*

Working Groups meeting at the Movement Strategy Space, [Nicole Ebber](#) */* [CC BY-SA 4.0](#)

Connecting to the bigger picture

Many participants connected the dots between participating in movement strategy and the world's unique present moment — on issues like pandemic, the politicization of "truth," and systemic racism.

- *"Right now, there is such an over-politicization of everything; even a global virus or disease are political events now. The work that we're trying to do here with movement strategy is so important, because whenever people look up some piece of information, they're seeing someone else's perspective.*

- *"If we don't include people in representing their own voices and perspectives, someone else will write that story <u>for</u> them. That is the history of history. So the work that we're doing in the strategy is really about supporting active engagement from all of those voices."*

- *"Inclusion is a matter of survival. For me, the movement strategy work connects to everything else that is happening in the world right now around being good allies to marginalized and less privileged communities.*

- *"Diversity and inclusion is a matter of survival, and of our movement staying relevant in this work — as opposed to just being white male Wikipedia authors who know a lot about certain topics. This is a chance to become something that makes an impact in the world, and to become more relevant to the survival of the human race."*

3. Invest in up-front planning

"*Value the up-front work.*
Take the time to do planning, and do it well — it will save you in the end."

Strategy Writing Sprint in Wikimedia Deutschland Office (Berlin), December 1st - 7th, 2019. Abbad Diraneyya / CC BY-SA 4.0

Slowing down at the start can help you go faster later on. Across the working groups, liaisons and community we spoke with, there was widespread agreement: investing in up-front planning was essential to avoiding delays, confusion and pain later in the process.

- ***"When enough time is given to planning, you don't get bogged down later.*** *Rushing the planning phase just creates bottlenecks later on."*

- *"Don't do planning at the same time as hiring / on-boarding. It's unrealistic."*

- *"Process design was mostly synchronous with work, rather than preceding it. This resulted in a constant lack of clarity about next steps."*

Running an "iterative" or agile process doesn't mean you can't plan

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

- ***"Iteration is not the same as 'constant scrambling.'*** *There was a lot of fetishizing 'iteration' as a way to avoid doing planning. But in some instances, that worked against inclusion. It's hard to participate in a thing you don't understand, or that keeps changing all the time."*

- ***"One of the biggest problems for us as Strategy Liaisons was: the frequent changes to the process.*** *It wasn't that the process was too complicated, but it was redesigned several times on the way. That's the difficulty. Changes happened too often, and made it harder for people to digest and understand at their pace."*

4. Normalize learning and improvement

"*Have a rhythm for reflection*
and small improvements."

Strategy Writing Sprint in Wikimedia Deutschland Office (Berlin), December 1st - 7th, 2019. Abbad Diraneyya / CC BY-SA 4.0

Any iterative process thrives on having regular moments to pause, surface learning, and make small improvements together. Scheduling these reflective practice

sessions (sometimes called "after action reviews," "retrospectives," or "tuning sessions"), and making them a regular, predictable ritual is crucial. Without this, you risk all of the chaos and agile or "adaptive" processes — without the benefits.

Schedule regular reflective practice

- **"You need to include milestones into the project for design iteration — explicit 'pause' moments to focus and shift.** *And you need to schedule them in up front."*

- *"**There have to be moments of slowing down and reflection built into your weekly rhythm,** if you want to have thoughtful, constructive communications across your team."*

- **"To be effective [with reflective practice], you have to plan it out and make intentional time and space for it** — *as opposed to iteration as a reactive scramble. A lot of knowledge was lost because we lacked this reflective 'lessons learned' culture."*

Focus meetings on learning instead of status updates
(eg, "what we learned" vs. "what we did")

- **"A lot of our team meetings were focused on 'status updates' — but that's about sharing <u>information</u>, as opposed to sharing <u>knowledge</u>.** *It's the difference between: "Here's what I did" (information) versus "here's what I learned" (knowledge).*

- **"You need to create a culture of sense-making.** *A space where debate and dissent and different and opposition is invited, so that we can look at things from a different perspective. It's about surfacing trends, patterns, dissenting voices, things that gave you pause."*

5. Clarify roles and responsibilities

"*It's not just the what but the who.*
Not just <u>what</u> you need to deliver, but also: <u>who</u> needs to be involved?"

Participants at a Strategy Salon in Cairo, Egypt, in July 2019. ولاء */ <u>CC BY-SA 4.0</u>*

A consistent learning from Movement Strategy participants was the importance of being crystal clear about group roles and responsibilities. This is crucial both for better *internal* collaboration within the team, but also so that others *outside* the team know who to seek for help (eg, "who to ask for what.")

- *"It was hard to tell how roles, authority, and decision-making would work."*

- ***"We needed more clarity around management roles and responsibilities across the team."***

Publish a Team Charter

Documenting roles and responsibilities can help. Publish a Team Charter or "User Manual" so that others outside the team know who to ask for what. Instead of just rigid role descriptions, make it a living document that evolves with the work.

- *"As a Strategy Liaison, it was unclear to know who was who in the team, or **who to ask for what on [the] Core Team.**"*

- *"The focus felt like it was more on the <u>initial</u> design of roles and responsibilities, rather than adapting to the work when we realized what the work is once we had started."*

6. Be explicit about power & decision-making

"**Whenever we make a decision, we face questions and confusion** around *who* we need to make the decision with."

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) / [CC BY-SA 4.0](#)

Decision-making is difficult. Doing strategy in the open across a diverse set of different organizations, affiliates and communities is complex. Trying to establish more *clarity* in how decision-making will work, especially at the *start* of the process, can dramatically increase psychological safety and reduce friction later in the process. In an open, collaborative process, these lines easily become fuzzy. But avoiding frank discussions about how power and decision-making will work often back-fires later in the process.

- *"What does it really mean to "be consulted?" We need to be very transparent and clear about what, how, and when."*

- *"We need to be more clear and transparent regarding the governance models for big processes. It took a while to get clarity around what endorsement / consent might mean for approving the recommendations."*

- *"It would have been helpful to clarify *how* decisions are going to be made at the outset. Decision-making is a problem across the Wiki universe. We are consensus-oriented by default, but that's not always the best tool or process."*

- *"You need to value the importance of these conversations at the outset. And document potential assumptions and blind spots."*

Be explicit about informing vs. consulting vs. deciding

In a complex project with many moving pieces, it can easily become unclear about where participants are being asked to *make a decision* themselves, where they are being asked to *give advice or help influence* a decision that will be made by others, or where they are simply being informed. When others are invited to "give feedback" without these clear boundaries and outcomes spelled out, miscommunication and frustration happen.

- *"It's vitally important to distinguish between: are we surfacing opinions, or making decisions? People need to understand: is this just information, or am I*

being asking for "feedback" / my opinion? It's important to be crystal clear in terms of what stage we are in."

- *"**When you ask a diverse group of people for feedback or opinions, it's very difficult to do synthesis afterwards and try to narrow it down.** They have the expectation, mostly, that what they said will be integrated. But: the actual end result could be totally different."*

- *"**Community and volunteers are asking for <u>influence.</u>** There is lots of room for misunderstanding if they don't get it. And this leads to a lack of trust."*
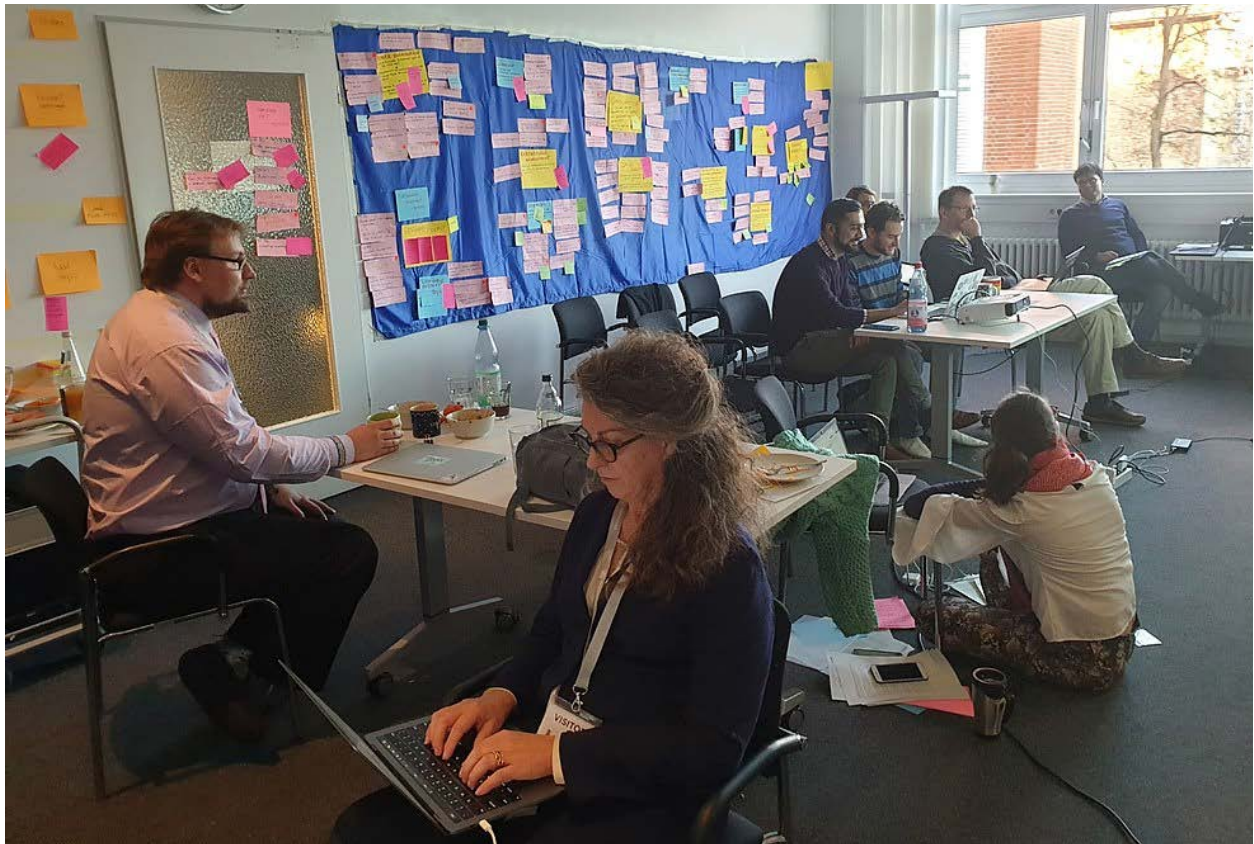
Strategy Writing Sprint in Wikimedia Deutschland Office (Berlin), December 1st - 7th, 2019. [Abbad Diraneyya](#) / [CC BY-SA 4.0](#)

"Disagree and commit" (versus re-opening made decisions)

The Movement Strategy core team spoke about the need to avoid going back and re-opening previous decisions, and instead adopt a working agreement around

"disagree and commit" or "fearless advice and loyal implementation" — encouraging open debate and advice in the decision-making process, but then faithfully implementing and sticking to the decision once it has been made.

- *"We slowed down decision-making by debating and revisiting made decisions. You need to provide a clear understanding of when decisions can be revisited, and how to do that."*

- *"When the team is in the process of decision-making, anyone should come with their own advice on how to do it, in a fearless way, with no boundaries or barriers. But: once the decision is made, we should stand behind the decision, and present a united front to the outside world."*

- *"This can be harder to do in the online space — how to work towards candor inside the team, so concerns are expressed, but then balancing with the need to move forward."*

Communicate the "why" or rationale behind the decisions

Communicating the results of a decision-making process are a key part of the process. You need to not only communicate the decision that has been reached, but also the rationale *behind* the decision, or the advice that influenced it.

- *"When decisions are made, clarify the rationale and advice behind it. You need to explain the trade-offs, the constraints and operational realities."*

- *"Communication is not only outward-facing / announcing; it can also be about giving people a sneak peek into the decision-making process along the way, as well."*

7. Set clear working agreements

*"**There are many different ways of working** and 'getting things done.' Be empathetic about other people's work style and strengths."*

*Movement Strategy Process Working Group members participating on the last day of the Wikimedia CEE Meeting 2018, Dato Abuladze / *

Groups need clear ways of working together, and some degree of alignment and consensus around how they're going to communicate, plan, and get things done. These aren't always clear at the start, but you can propose, document and update them together as you go.

- *"**Have a dedicated person in the group that focuses on the HOW:** team governance, meetings, roles & responsibilities, agreements."*

- *"**It was sometimes difficult to get the team to focus on the 'ways of working.'** Conversations often immediately drifted off into content or community work, and did not leave enough space to actually figure out the norms for the team."*

Make the implicit explicit

Good working agreements make implicit rules and assumptions explicit, so that everyone is clear. This means fewer misunderstandings and reduces hidden biases or barriers.

- ***The "Hacktivist" mentality is: 'go figure things out on your own.'** (Versus: if you need help, you ask.) It's hard to know how to reach out, who to ask for help.*

- *"**So many practices stayed implicit, but were not explicitly shared. Making the implicit explicit is essential** -- the culture, principles and tools for the team. How you operate. But [it's] hard when you're moving so fast."*

- *"**We had a Governance document that outlined roles, meetings, etc.** But it became somewhat out of date over time, and wasn't something we more formally onboarded people into."*

Group photo of the RRRR Working Group meeting 2019 Berlin, February 2019, [Martin Kraft](#) / [CC BY-SA 4.0](#)

Include space for cultural differences

Working agreements can also help sort through different cultural approaches, and adopt a more diverse and inclusive way of getting things done.

- ***"Strike a balance between work styles.*** *Where do we need to be pushy, versus where do we need to take a step back and think: "What else? What are we missing here?"*

- ***"You need to understand the different cultures' approaches to delivery, accountability and push/pull of information."***

- ***"Incorporate more equity in everyday work and design.*** *Versus thinking of it as an outcome of certain things we do together."*

8. Help newcomers get on their feet

*"**This is the main challenge for movement organizations:** how to onboard people in ways that are inclusive and welcoming to the movement."*

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) / [CC BY-SA 4.0](#)

Working agreements help with onboarding

Documenting team working agreements helps onboard and add new members to the group, like a user manual for the team.

- *"**This is the main challenge for movement organizations:** how to onboard people in ways that are inclusive and welcoming to the movement."*

- *"**You need to onboard people not only into the WHAT, but also the HOW.** And then adapt and up-level those things as the team goes. We never placed enough emphasis on the culture of the team, diversity, practices etc."*

- *"**We should put more focus on onboarding people into the Wikimedia world.** Including: 'the community' - what it means, the range, the culture etc. And: seeing onboarding as an opportunity to be *inclusive.* To walk the talk."*

Help new teams get on their feet

Core Team, Liaisons and Working Groups all spoke to the importance of the initial team "forming" stage — and about how slowing down and providing more training and support at the start of the process helps the team flow and go faster later on. Instead of just being left to self-organize or "figure it out on their own," most volunteers said they wanted more guidance and support.

- *"**You need support at the 'forming' stage of the team,** to make explicit the range of diversity and cultural norms, practices and expectations for team building + work design."*

- *"**It takes time for people from different backgrounds and time zones to learn how to work together.**"*

- *"**Each working group had to deal with a lot of organizational stuff in the beginning** — which tools to use, how to set up meetings, meeting frequency, how to start working etc."*

- **"Provide more support for disparate groups of volunteers to form effective teams:** *this could be professional facilitation, training/coaching on how to form an effective team."*

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) / [CC BY-SA 4.0](#)

Ritualize appreciations and positive feedback

One of the consistent working agreements of healthy, high-performing teams is appreciative practice: regularly acknowledging and appreciating each other.

- **"You need regular team practices for reinforcing and checking.** *And for asking for and receiving help."*

- **"At the end of every week, we did check-outs with gratitude.** *These were simple weekly appreciations, for something a member of the group had delivered, or how they showed up for each other, etc."*

9. Use the right collaboration tools

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

Wikimedia Summit 2019, Jason Krüger / [CC BY-SA 4.0](#)

Effective teamwork and collaboration is all about agreeing on the right rhythm, practices, and tools — as opposed to a more ad hoc, "everybody just figure it out on your own" approach. Using the right project management tools to track tasks can

dramatically increase the group's effectiveness, increase asynchronous work, and reduce the need for meetings and email.

- *"**I came in with the assumption that Wikimedians are really good at communicating and connecting remotely, using digital tools, etc**. But the challenge is around *joint* work. Wikimedians are used to working individually — the workflow for collaborative work was much harder."*

Set clear rituals for prioritizing and tracking work

Have clear working agreements for what tools you'll use to prioritize and manage work. This can also help reduce unnecessary meetings and email.

- *"**Having a clear meeting structure and roles creates frequent touch points for communication across the team.**"*

- *"**Facilitating good internal team meetings is a huge amount of emotional labor,** but was invaluable to helping our time together be fruitful."*

- *"**Weekly close-out meetings were successful as a way to report out on what we all had done, to ensure key milestones of the week had been hit.** They ensured common understanding across the entire project, to focus and ensure we had the right conversations at the right time with the right people."*

Reduce meeting fatigue

"Too many meetings" or "meetings by default" is a common pain-point for participants.

- *"**At times we were over communicating and drowning in calls, yet not much was happening and we were going around in loops.**"*

- *"**There were too many meetings, and too many people at meetings.** To me, this was about a lack of clarity about team objectives and roles."*

- *"Another problem is **the assumption that <u>everyone</u> should be at almost every meeting** — when in reality only a few key stakeholders are needed. This wastes a lot of time."*

- *"**Team calls should serve higher-level purposes, like building momentum before major openings, sunsetting phases, and the exchange of knowledge and experience**."*

Use tools to make tasks more visual and transparent

Different groups have their own preferred method or tool for tracking tasks and who is doing what. The important thing is to commit to some kind of shared norm or practice that works for the group.

- *"**Having communication on Asana cards to support event planning and travel was life-saving!** It allowed us to get the information asynchronously not lose track between the hundreds of travelers and the many processes"*

- *"**Having someone clearly log tasks helps people to be present in the meeting is invaluable.** Always have 1 or 2 support people to provide this follow-up & project management support. It creates shared transparency and understanding in the team."*

- *"**[Our project managers] worked very hard to keep track of all key information on Asana** -- meetings, milestones, tasks, etc. I am deeply grateful for this level of detailed work that helped keep me and others on track."*

- *"**Using Google tools to share information and connect our work helped a lot.** I wish we had our own internal tools, but, while we don't, these served pretty well."*

Set clear working agreements for how and when you're using each tool

Everyone's work style is different, and it's ok if people in the group use these tools differently — so long as you have clear understanding and working agreements around them.

- *"**It would have made our lives easier if the whole team had consistently used Asana**, so that we could have tracked the progress, potential delays, need for support and information better."*

- *"**Onboarding helps here. Explain the rationale + purpose behind the tool** — eg, as a way to save work versus creating extra effort."*

- *"**Design, style and structure makes a big impact**, in terms of how you set up and use these collaboration tools. It's about the design and working agreements, not just: 'hey, use this tool!'"*

10. Tell the story

*"Create a **regular, predictable cadence** for communication."*

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

One of the key challenges for any adaptive, open strategy process is: how do you tell a clear story and consistent narrative, given that the moving pieces and process

often shift? How do you do an iterative, adaptive process, without constantly changing your story or sending mixed messages?

- ***"I would often hesitate to communicate, wondering: is this going to change?*** *Things changed so often. So we would communicate decisions / next steps, then something would change."*

- *"**When you're in an adaptive process, you have to decide what you want to communicate, and how much**."*

Set the right cadence for updates

Create a communications plan at the start of the process, including a regular cadence and milestones for updates.

- ***"Create a regular, predictable cadence for communication.*** *Instead of just ad hoc, put out regular monthly updates for example."*

- ***"We were using one structure to convey two different kinds of communications.*** *Information is always iterative, whereas the decision stream tends to be more tied to milestones. This could have been more structured. Using one way to communicate both these things will lead to doubt and back-tracking."*

11. Connect the dots between different projects

"*Be more explicit about where things overlap,* and where processes are intertwined."

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) / [CC BY-SA 4.0](#)

Weave related initiatives and threads into a single narrative that makes sense for participants. What feels "separate" for some may not feel separate for others. Many Movement Strategy participants spoke to this challenge of "parallel processes," or

multiple threads. The boundaries or dividing lines between various initiatives or pieces of work are not always clear for people paying different levels of attention.

Some of the participants we spoke with were frustrated about the perceived overlap between Movement Strategy and other community consultations and initiatives, like Branding or the Universal Code of Conduct. They felt that this undermined trust and created confusion.

- *"It has been confusing to have these parallel processes going on at the same time. The community isn't seeing the difference between the processes, and it gets messy."*

- *"What would have helped would have been better communication.* eg, 'Branding is going to fork here.' Certain processes need to be intertwined or sequenced in a way that makes sense."*

- *"Some of our working groups worked for four years.* We thought we had an understanding of how, together, we would develop the background needed to get us to 2030. But: then there was this other rogue process that was also a part of movement strategy, and that was branding."*

- *"This de-legitimized the process in the eyes of **many community members who do not really differentiate between the various processes 'coming from' the WMF** (even where 'coming from' only means supported by)."*

- *"It took the wind out of the sails of the working groups. The fear is that we've done all of this work now -- so what might be the next thing that 'goes rogue?'"*

12. Simplify language

*"**Always be mindful of non-native English speakers.** Use straightforward language with clear calls to action."*

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) / [CC BY-SA 4.0](#)

Use simpler communication and messages designed for translation. There's a tension between capturing nuance and complexity on the one hand, versus communicating in ways that translate well across languages, contexts and culture. Keep it simple.

- *"Actively strive to use language in documents, on-wiki-pages and mailings that is **direct, comprehensible and translatable.**"*

- *"**The language was too complex and technical.** It was hard to translate."*

- *"**It felt like the only way to participate was if you could speak English.** Full stop."*

- *"**Make all the sentences of the recommendation easier to read in all the languages.** The translated document on Meta is not clear enough to allow other Wikipedians and Wikimedians to read in their mother tongue."*

- *"**The recommendations can be complex, but the communication could have been simpler.**"*

- *"**Language was not adjusted to the level of English that's acceptable for the communities.** Editors understand neither the need for corporate jargon nor the need of our focus on the structures."*

Use visual communication to increase accessibility

Contemporary communication is increasingly *visual*. It employs other media beyond just "walls of text." This can be particularly useful for breaking down complex processes, or driving home key points.

- *"**Audio and video can really help with accessibility, especially if English is not your first language.** Consider other media, like videos and podcasts. Especially for reaching emerging communities."*

- *"**Visuals were such a useful storytelling tool.** Images, timelines, etc. We made great visuals but often didn't get enough use out of them, or translate them."*

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) /
[CC BY-SA 4.0](#)

Publish summaries. Stress what's relevant for specific audiences.

Lengthy documents need to be summarized and framed in ways that lead with what's most relevant for specific audiences.

- ***"The documents were often very long.*** *Many people aren't keen on reading really long text. Summaries and infographics help, so that they can more easily understand."*

- *"**Much of what we were trying to communicate was really complex (what is 'structural change?').** We sometimes focused too much on what we needed to communicate and not what our audience needs to know (eg, 'how does all of this affect me?')"*

- *"**There are lessons around framing.** For example, not a lot of people wanted to participate in a topic like 'Revenue Streams.' But what if we had just called it 'Money?' Or: 'Who gets the money?'"*

- *"**We should have been more specific in our approach.** We targeted the movement 'as a whole,' and did not do a lot of segmenting of our audience in our messaging."*

- *"**It's hard to please Wikimedians. You need to be clear, consistent, and transparent.**"*

- *"**We changed the tone of our messaging after Wikimania 2019**. We started steering away from the 'aspirational' messaging to a more simplified, straightforward tone. It felt like this resonated a bit more, at least on wikimedia-l. The tone was no longer so top down."*

13. Make clear asks of participants

"What helps is asking really clear questions."

Discussion with members of the Arabic Speaking Community during WikiArabia 2019 conference in Marrakech. Noureddine Akabli / CC BY-SA 4.0

Asking for general feedback in a wide open way may *seem* more collaborative or 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*.

- ***"Ask really clear, concrete questions, as opposed to 'what do you think?'*** *Have a clear understanding of what you actually want from people. Guiding them more to the exact value they can bring. What questions / answers / feedback do you want people to bring?"*

Be clear about *when* people want to be consulted

- "Share early and often" is a common rule of thumb in open processes — sharing drafts in progress, releasing early prototypes, iterating and editing in the open, etc. But **some audiences actually prefer to be consulted *later* in the process**, or can get frustrated by early drafts and prototypes.

- ***"There was a lot of miscommunication / false assumptions when we shared early drafts.*** *This was surprising to us, given the way Wikipedia actually works. We tried to explain to people that this was an adaptive, iterative process. And we wanted to share early because we were worried that if we didn't, people would think: 'this strategy has already been set.'"*

- ***"[W]hen we shared things in raw, early form, people often ripped it apart.*** *The first version of recommendations was published early -- a very early prototype. And it got met with a lot of pushback. It was almost like: 'how dare you publish such an unready thing?'"*

- ***"Context and expectations matter.*** *There was a lot of waiting between these early drafts, so people didn't take them as drafts; the amount of waiting created expectations. Whereas if you see something on meta.wikimedia.org, people bring a different expectation; they understand it's a work in progress."*

14. Close the loop

"Respond to questions and comments.
Make people feel heard."

ESEAP Strategy Summit Day 1 - Discussion 15, Lady01v / CC BY-SA 4.0

When you ask for feedback, you generally get it. So care has to be taken in how you're going to systematically listen and respond to that feedback (in a realistic way — you can't always personally reply to everything) and how you're going to close the loop, in terms of communicating back to people how their feedback will be acted on, and why.

Make people feel seen and heard

- *"I was surprised by how far collegial interactions can go, especially in virtual spaces. Even the loud voices and trolls can provide useful information when their concerns are acknowledged, and information is provided for them."*

- *"The storm of questions, responses and comments were so overwhelming that we didn't manage to respond to everything. But we made sure everything was seen."*

Be systematic about how you listen and respond

For large-scale consultations, you can't always just respond in an ad hoc, hyper-individualized way. The key is to be collaborative and systematic about it, as part of your overall Communications Plan.

- *"Having formal 'reply roles' was super helpful. Each team member was monitoring and replying in different forums, so that we had all of our ground covered."*

- *"We were able to jump in and respond, communicating collectively. When a question is asked of a particular person, the team members were helpful in closing those communications loops for and with others."*

- *"Have each others' backs. A lot of the success of the team came not only from what we said, but what we did for each other."*

- *When you're in listening and feedback-gathering mode, your plan should include key ingredients like:*

  - *Reply Roles. Which teammates are responsible for monitoring which communications platforms?*
  - *Triage. Prioritize around what actually requires response. Set clear criteria for what needs to be replied to, and what doesn't.*

- ○ ***Key Messages.*** *Draft shared talking points so that answers are clear, accurate and consistent.*
- ○ ***Enlisting allies.*** *You don't have to do all the talking; enlist liaisons or community champions to help.*

Triage. Know when to engage and when to ignore.

You can't respond to everything. Triage and having clear group agreements around what to respond to can help.

- ● *"**We had clear protocols and responses around what *needed* to be responded to**."*

- ● *"**We figured out when it was good to respond, and when it was better to just leave stuff alone.** Our responses tended to focus on factual corrections. This helped avoid fueling conversations that were actually just a distraction."*

Resource Allocation Working Group (Wikimedia 2018-20) members, Ann Lukens /

Enlist allies to help with listening and responding

- *"**Having allies step up was invaluable, as opposed to doing all the communicating yourself**. Someone coming up from the community to speak up instead."*

- *"**These allies also knew the loud voices well enough to understand when we needed to respond, versus when it was better to ignore**."*

Close the loop. Communicate how feedback will (or won't) be acted on

"Closing the loop" can often be the most difficult (and contentious) part of the process.

- *"**Make sure people's feedback can be acknowledged.** Show how the feedback was used. People want to be acknowledged and they want to be recognized for their input and contributions."*

- *"**How can we make sure people see the results of their ideas and feedback in the final recommendations?** We tried to take this idea seriously. Versus: sometimes consultations feel like they're done as a fig leaf."*

- *"[Sometimes the community] read what the feedback was, but it wasn't clear to them <u>how</u> the feedback was going to actually be acted on."*

Some participants reported that this was a challenge for them, and that it wasn't clear to them how (or if) their contributions and feedback were being acted on.

- *"**There were a lot of conferences and meetings. But we didn't hear anything about the results**. I didn't know where to look."*

- *"Some Wikimedians are already asking me: 'We participated in so many discussions. **So where are the results?** Where are the improvements?' We're not sure how to discuss this with our community members."*

- *"Listing footnotes and links to community input in the pre-final version of the recommendations felt intuitive, but people still really needed to be 'led' there. **Maybe we should have made this even more prominent and / or compiled this in a report that was prominently featured.**"*

- *"If you are radically open on the one hand, you raise the expectation for some that everything that is said will then be implemented. At the end of the day, that*

is not possible; you need to diverge and converge. That is something we needed to learn also in a painful way: **giving feedback does not mean that ALL of the feedback you are giving is implemented.***"*

- *"At the same time, we tried to tackle some of the really difficult questions. Like power structures, or who decides when and how money is going into the movement. We started this, but did not finish it yet."*

15. Reduce barriers to participation

"**In groups, you're often not hearing from everyone.** There are quiet voices, not just those who can speak loudest."

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) / [CC BY-SA 4.0](#)

When we asked Movement Strategy participants about how their experience could have been better, a consistent set of clear themes emerged. Participation was often hindered by barriers related to:

- Time commitment

- Travel, language and time zones
- Access to technology and data
- Training and capacity
- Experience / familiarity level (eg, newcomers vs. veterans)

Set realistic time commitments

- ***"We want diversity, inclusion, and participation from emerging communities.*** *But those volunteers can't necessarily read all this stuff we require them to read, or be actively involved in all aspects of the process."*

- ***"Ensure realistic time commitment from average participants.*** *Be more realistic about the amount of time required."*

- ***"Participation from the community is not always easy due to barriers in language, time zones, country processes, or restrictions.*** *We sometimes had to trade off participation, and struggled to reach new voices due to these barriers and our own time constraints."*

Break down travel barriers

- *"**We need better understanding of the limitations that participants outside of North America and Europe have to travel** — like limited travel funds, paying up front for visa costs, meals that aren't provided at events, taxis, etc."*

- ***"To genuinely engage community -- a whole range of diverse community -- at events, consideration needs to be given to:***
  - *multi lingual support,*
  - *more time to create common understanding during events,*
  - *a culture + diversity lens applied at the design phase,*
  - *...providing the tools and resources for people to participate (eg, hiring a local space with stable internet, etc)."*

Wikimedia Summit 2019, Jason Krüger / [*CC BY-SA 4.0*](#)

Lower barriers to internet access and data

- *"**Volunteers have to contribute not only their time, but also their resources.** Data is expensive."*

- *"**The core team should have provided us with materials such as a computer and connection.** Even if we have our own materials, they may be of low quality and not good enough to work on a digital activity such as this one."*

- *"**The challenge we are facing for most African communities is internet.** When you need to volunteer not only time, but also resources, it's too much."*

Be more accommodating to different time zones

- *"Staying up for online meetings in my working group was difficult.* They mostly happened around 2am for me — and most of us go to work at around 7 or 8am. This makes it difficult or impossible."

- *"It was really difficult to accommodate both South Asian and American time zones.* Maybe we should have used rotating meeting times to accommodate Asian time zones better."

- *"My time zone in Singapore is the furthest end of when we do working group meetings.* They usually happened at 11pm my time, right after my work, during my commute time. I really appreciated having the meetings show up on the calendar on my smartphone, to see if they would conflict with my work, so that I could delegate it to someone else if necessary."

Provide added resources and equity

- *"The volunteer culture in African countries is different.* Resources are scarce, so when other organizations ask for people to do volunteer work, they facilitate them and help them with resources. When volunteers come to Wikimedia, they come with the same expectations — but don't receive those things. The retention rate is very limited because of that."

- *"In my community in Nigeria, volunteering is really a challenge.* A lot of people want to volunteer. We can help these people through scholarships and empowerment programs, as a way to say: 'we don't just want your time and expertise, we're also adding value to you.'"

Match volunteer asks to training, capacity and interest

- *"Sometimes we ask volunteers to do things that they don't really have the training or capacity for.* You can't ask people to work outside their experience unless you train and support them."

- *"**The idea of doing radically open collaborative strategy is at the heart of who we are.** But most of us don't really know how to write strategy — and neither do the professionals. It's extremely hard to do!"*

- *"**You have to design for the capacity of the people you are engaging. And invest in lifting them up to the level they can participate as equals at the table.** There is a learning component to open participation, and we tend to skip that piece."*

Invest in facilitation for better experiences and more inclusion

- *"**Oftentimes in groups you're not hearing from everyone.** There are quiet voices, not just those who can speak loudest. Facilitation is important in ensuring every voice is heard."*

- *"**During our salon we used a 'world cafe' facilitation style to get people to participate** and it worked so well for us."*

- *"**Post-its and round table conversations in small groups can help in facilitation**."*

16. Prioritize trust and psychological safety

*"People can only surface their knowledge **when they feel safe** to do so."*

Group photo at WikiConvention Francophone. From left to right: Emna Mizouni (Wikimedian of the year, from Tunisia), Aboubacar Keita (young president of Guinea's User Group), and Diane Ranville. [Lëa-Kim Châteauneuf](#) / [CC BY-SA 4.0](#)

There's a psychological and interpersonal component to doing this work that many cited as important and often under-acknowledged. Responding to criticism, dealing with conflict, building relationships — all of this was a crucial part of the work in building collaborative strategy across a diverse movement.

- *"Building trust with the community was critical, and was much of the 'invisible work.'"*

- *"There's a trust deficit towards the organized part of our movement. Building good will was a huge part of the work."*

Strategy Salon gathering Wikimedia Côte d'Ivoire members in Abidjan. [Modjou](#) / [CC BY-SA 4.0](#)

Emotional labour and invisible work

For many, Wikipedia is a crucial part of their identity, not just their work. This creates an added strain and weight for many participants.

- **"Pushback becomes more painful and personal."**

- **"There is a tremendous honor, privilege and burden doing this work which impacts the world in such a profound way.** *I think the reality of that sometimes 'weighed on' people. It's a lot of emotional labour."*

- *"This is not only a job. We also want to change the world and make it a better place. So pushback becomes more painful and personal."*

- *"There are different tolerances for discomfort and uncertainty."*

- *"It may be painful along the way, because we have to let go of things and be open to new things."*

Fear of loud voices and conflict

"Don't let fear be the driving force."

Criticism and pushback are a frequent part of the process. Many participants expressed a desire for more tools or coaching in how to deal with this.

- **"We need to stop being afraid of the loud voices, and not let us be driven by their pushback.** *This probably goes for everything that movement organizations do."*

- *"We often hesitated to do any communications because we were fearful of blowback. We also felt the need to over justify or over explain things, for the same reason."*

- *"We weren't always comfortable with pushback and the discomfort of others. The capacity to sit in the discomfort of transition is a skill, and making it explicit that it is okay to be uncomfortable would have helped."*

- *"Often complex dynamics / emotions from others can get surfaced simply as: 'I don't like that!'"*

- *"Learning to sit with the discomfort would have been really helpful. With a coach, etc. This is especially difficult if your own job or career is not secure."*

ESEAP Strategy Summit Day 1 - Discussion 08, Lady01v / CC BY-SA 4.0

The need for interpersonal tools and practices

Many participants spoke to a desire for greater access to tools, practices and capacity-building for difficult conversations, conflict resolution, and interpersonal communication. In many ways, this is a huge source of invisible labour or work in

any movement organization, and one that could be more fully acknowledged, resourced, and trained around.

- **"Having skills in depersonalizing conflict and tension would have been useful.** *It was very ugly at moments."*

- *"This was also perpetuated by taking blame or blaming colleagues rather than having difficult discussions."*

- **"It's not just about knowing you need to do it, you need to be <u>skilled</u> to do it.** *There are specific techniques and practices (eg, non-violent communication practices) that can help."*

- **"[In the absence of this training and practices], people instead respond by staking their own personal social capital and good will to overcome difficult situations.** *People put their name, credibility, and good will at stake every time there was a crisis."*

- **"Onboarding everyone who works in the Foundation on the role of Trust + Safety should be mandatory and done very early on in someone's onboarding.** *Including: how to handle crisis, harassment or abuse."*

- **"This is a skills gap in the Movement.** *Luckily, the movement strategy recommendations recommend some of that, but it will take a lot of time."*

- **"I know this kind of training is expensive, and these kinds of decisions often boil down to cost. But we need to consider: what does it cost, in a bigger sense, <u>not</u> to do it?** *What did it cost people in terms of their well-being, efficiencies, and quality of the finished product? This should be considered in terms of the value of investing in this area. This is about: what kind of culture do we want to build, and what is the training we need for that?"*

The importance of a universal code of conduct and clear boundaries

Others spoke to the need for clear boundaries to support these practices, arguing that conflict resolution and other non-violent communication practices only work when they're supported by clear boundaries for trust and safety (eg, a Universal Code of Conduct, Trust and Safety guidelines, etc.).

- *"These kinds of practices only work if there is also a basic red line to call out and stop abusive behavior. Otherwise, we risk simply training victims of abuse how to be abused better. That requires commitment and courage."*

17. Empower liaisons and working groups

*"You need people who can speak the community's language, and **meet them where they are**."*

All of the participants we spoke with agreed that using community liaisons and working groups was a successful prototype, and that it should be continued and serve as a model for other projects. They also identified the need for improvements and a more systematic approach.

- *"**This was a good pilot.** There were learnings we can apply in future, working across the communities as a Task Force or Working Groups."*

- *"**They were able to meet people where their interests lie, and bring people on board in a meaningful way**."*

- *"**This 'people-centeredness' has emerged as a core principle.** It's not 'content first,' or money first — it's people-first. If we take this into our DNA, we'll have much healthier communities and interactions across the globe."*

Day 3 of Wikimedia 2030 Harmonization Sprint, [Camelia Boban](#) / [CC BY-SA 4.0](#)

Organized structures within a decentralized movement

The working group and community liaison model represent a more structured approach to collaboration than the ad hoc, self-organized approach that typifies most of Wikipedia.

- *"**The working groups were tasked with coming up with enduring questions that have plagued the movement for 15 years.** And they had to figure it out together across languages, cultures, and new ways of working."*

- *"**We have never worked this way before.** It represents more structured collaboration, versus ad hoc collaboration. Its collaboration organized around something other than content."*

- *"Working Group members are becoming agents of change taking strategy to regions joining affiliates. **It's an example of a more organized structure starting to function within a decentralized movement.**"*

Strategy Liaisons share knowledge across communities

The Strategy Liaisons we spoke with enjoyed sharing learning across communities and locales.

- *"**As a liaison, I found it really helpful to understand how dynamics worked in other communities.** Everybody understood that what works for their community does not necessarily work for other communities."*

- *"**There were times when each of us had challenges in our work, and I found it really helpful and supportive to talk to my colleagues**. And to understand how the dynamics in their communities work."*

- *"**We were each advancing in a parallel universe of languages**. Some of us had communities that overlapped where we could cooperate (eg, French / Arabic areas in Northern Africa.)"*

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

Ways to improve the working groups and liaison model

Bring liaisons into the process more

Many of the Strategy Liaisons we spoke with felt like they could have been used more fully:

- *"Sometimes it felt like we [as Strategy Liaisons] were under-used human capital."*

- *"Consider the liaisons as partners who have knowledge about their communities who can help and support in decision making, not only as 'operatives' applying orders."*

- *"Create more space for liaisons to produce their own blogs, 'top 5 requests from the community,' etc. More of their own synthesis around what the community is saying."*

Clarify the rationale and context behind decisions

Something we heard clearly from Liaisons and Working Group members is: it's important that they be brought into the decision-making process earlier on, so that they can fully *understand* the decision, and thereby explain it to their communities. Without this context and rationale, it becomes much harder to do their jobs.

- *"It would have been better to get an explanation for the WHY or the rationale behind the decision. To digest and ask questions. **We can't answer questions from community if we ourselves don't know the answers."***

- *"It's not just about production of content, but about having the knowledge and awareness <u>behind</u> the content, so that Working Group members can explain it."*

- ***"I was selling someone else's product, so it was harder for me to answer simple questions from the community** (like 'what did they mean by this?'), or build accurate metaphors ('look, their approach was like this...'). In practice, this meant I was forced to defend the recommendations, rather than promoting them."*

- *"As liaisons, we had freedom to do things as we wanted; but overall the design was very operational. It wasn't unimaginative, because we did have freedom -- but WHAT we were doing was set for us. A window opened, someone threw us something, and we did it."*

Movement Strategy Roles and Responsibilities Working Group in-person meeting, Utrecht, the Netherlands, July 5-7, 2019, [Mehrdad Pourzaki](#) / [CC BY-SA 4.0](#)

Set clearer expectations and purpose

This applied not only to individual decisions and processes, but also bigger picture questions around the fundamental purpose of the Liaisons and Working Groups, and building more clarity and alignment around their role.

- *"What wasn't clear enough was: what is the purpose of our collaboration and engagement? Are we promoting the strategy in the online communities, because they are supposed to accept those? Or are we beta-testers / QA — like the testers of the product from the perspective of the audiences / online communities?"*

- *"We need to know WHY we are here, and what is our purpose in this team. Especially because our job is to explain to audiences why we are here. If I don't understand who I am in this setting, it is even more difficult to talk with community."*

- *"In some instances, we may have given Working Group members more power and authority than they wanted.* **On lots of calls, they wanted more structure and direction from the Core Team, and not having it caused long delays, wrong turns, and frustrations.** *This was not empowering to them. We should have respected their time and energy better by giving more direction, which we could have done while still remaining open and responsive to regular feedback. It would have been less stressful on everyone."*

- *"We often have discomfort with directional leadership in our movement, because we were built bottom-up. But these tendencies don't always scale well when there is something concrete to accomplish."*

Make it easier for Working Groups to engage with community

- *"***The Working Groups were successful in bringing together people from different perspectives and backgrounds** — *but we struggled to then get those Working Groups to talk to communities."*

- *"It was hard to get Working Group members to more regularly talk to communities, because sometimes that can be scary."*

- *"We tried to mitigate this by having staff and facilitators present. But* **I wonder if we could have innovated more around creating safe ways for Working Groups and community to talk to each other.***"*

- *"Some of this relates back to mandate and motivation. When we asked WGs to step up, we needed to ask them what they wanted to do. It wasn't necessarily clear that what they were signing up for was taking this to the community."*

Welcoming members from the nine working groups. [Douglaseru](#) / [CC BY-SA 4.0](#)

Increase Working Group openness

Some community members we spoke with felt that the Working Groups could have been more open by default:

- *"Once the Working Groups were set, **it seemed like the working group meetings were held in a closed / private way.**"*

- *"When I tried to join / contribute to Working Groups, they just said: "you're too late.""*

- "**Most people didn't know about the working groups.** They were limited to members, so if you wanted to join the meeting, you weren't able to."

- "**I would suggest in future: be more open to others**. Instead of people needing to be invited into a meeting. Some people would just like to watch. Do more 'open air' sessions. Like an online show that would accept questions from the general audience."

Strengthen the hiring and recruitment process

- "The Liaison model was a really good idea. But it comes down to reality in that it depends on the individual who gets this role."

- "**The Wikimedia Foundation needs to improve the hiring process for Strategy Liaisons.** Some were less effective than others."

- "The challenge is to really get people on board as Liaisons who have the skills and presence. To move out to people, to try different methods."

- "Liaisons are recruited by [the] Core Team or WMF. But maybe it should also go through the community. eg, in WM France, we have a community member participate in the recruitment process."

- "Liaison job announcements may not have been posted to wikis. We could improve the recruitment process."

- "**Have the community choose the liaisons.**"

- "Clarify who the Liaisons work for and are accountable to. Where the money comes from creates a power relationship."

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](…) / [CC BY-SA 4.0](…)

Consider making liaisons cross-cutting, instead of project-based

This was a big part of the suggestion to take a more systemic approach.

- ***"Create sustainable liaison positions."***

- *"We are the liaisons for Movement Strategy, and there are other liaisons for Universal Code of Conduct, and then other liaisons for other chapters. **Maybe it could be re-designed to think more long term, instead of hiring a liaison for each new project."***

- *"WMF should stay close with the community all the time — not just on occasions, and then disappear. Maybe liaisons should be a permanent role at WMF. The person can remain the same, and will have a big network and experience, which*

is enormously efficient and beneficial for WMF, and for any team wishing to reach out to the community at a given time."

- *"That way liaisons can learn more about the communities' agenda. Monitoring talk pages and village pumps, working for the communities. The 'community' would be your boss — but a boss that doesn't have time to give you orders, so you need to make it an inquiry to go out and discover."*

Other potential improvements

Other suggestions we heard from participants:

- **Engage liaisons in co-design.** *"Not just delivery. Have the Strategy Liaisons act as part of the design thinking, and not just limited to the delivery of the design."*
- **Consider working groups' workload.** *"WGs often lacked the time and capacity to fully engage with communities. Running community conversations while they're drafting recommendations at the same time left the groups little time to engage, which led to a bit of a disconnect between communities and working groups."*
- **Reduce the amount of up front work.** *"The initial design of the concurrent processes was overwhelming for the team and WGs - external research, working group discussions / development of recommendations, and community conversations (liaisons and salons, plus later on-wiki)."*
- **Clarify expectations for Working Group co-ordinators.** *"It felt like being a coordinator wasn't a strategy role, it was an admin. Being a co-ordinator was not a lot of fun."*
- **Clarify expectations for Working Groups re: engaging on Meta.** *"Expecting working group members to engage with communities on Meta and in general didn't work that well."*
- **Strengthen knowledge transfer.** *" Ensure continuity with previous phases, making sure the liaison knows what has happened with each community and does not restart from zero."*

- **Consider training and onboarding.** *"Training for liaisons: we might not know about all secrets of every wiki project, or about all community engagement techniques."*

18. Reduce financial and administrative obstacles

"Operational constraints often hinder our ability to ensure diversity."

ESEAP Strategy Summit Day 1 - Discussion 15, Lady01v / CC BY-SA 4.0

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 tightly linked to policies in *operations and administration* — in areas like travel policy, how people get reimbursed for expenses, and access to resources. Supporting diversity and inclusion often requires surfacing hidden barriers in these areas and tackling them.

- *"**Operational challenges often hinder our ability to bring new voices to the table.** If people face barriers to buying a meal at a conference, or paying high data costs, they often get frustrated and drop out."*

- *"It's really hard to see people who are really lit up and excited to participate, and what's holding people back is often reimbursement."*

- *"**There is shame and struggle for people in this.** One of my colleagues had to turn to me on day three [of a Movement Strategy event] and ask if they could borrow money so that they could eat."*

Update the reimbursement process

One of the key recommendations for reducing some of these barriers is reimbursing volunteers *earlier* in the process, or covering costs up front where needed. This can help minimize volunteers' financial risk and hardship.

- *"**Prepayment of hotels and flights is incredibly important to easing participation barriers for everyone.** We should offer a financial advancement to cover costs up front. (eg, 'do you require reimbursement before the event, or after?')"*

- *"One of the most effective things we can do is get money into people's hands sooner, to pay up front costs."*

Expand methods of payment

Not all participants have access to bank accounts, or are able to use the same process for receiving funds. Expanding methods of payment can further bolster equity and inclusion.

- ***"One of the biggest barriers was [a] method of payment.*** *It was hard to get $ into the hands of our African communities."*

- *"We should consider using World Remit, Western Union, or other payment platforms that are recognized in other parts of the world. Without access to these commonly used tools, it was very difficult to get people quick reimbursements."*

- *"Not having those systems in place meant that* after *the event, we had to tell people that to receive money, they would have to adhere to our North American policies of bank account or PayPal."*

- *"Many of the participants didn't have bank accounts, so that left them opening one up at their expense [often more than the reimbursement] or using a friend's bank account and having both of them sign a paper form and email it back. "*

- ***"Create a training video for reimbursement, to help overcome language barriers.*** *Or office hours / training for reimbursements. A lot of the people travelling may have not filled out a reimbursement form previously and need training for success."*

Day 3 of Wikimedia 2030 Harmonization Sprint, [Camelia Boban](#) / [CC BY-SA 4.0](#)

Explore new models for compensation

Many participants expressed concern that a traditional "volunteer" model for doing large parts of the Movement Strategy work was not equitable or fair in certain areas. There was support for exploring new approaches to compensation and reducing financial barriers to participation. These barriers can include everything from the cost of data and mobile, to childcare, to accessing computers and tech.

- *"We need to pay people equitably if they're doing the same work."*

- *"We should consider covering costs for people in areas where internet / mobile may be less available or expensive, to **ensure equitable tools across teams**."*

- ***"Some participants got paid and others didn't for the same work.*** *To put into writing: pay volunteers equitably if they're doing the same work as staff.*

- ***"This issue made me not want to participate any more.*** *There were some people who were being paid to take part in the process, and some weren't. Those being paid were generally from the Global North, and those not paid were generally from the Global South. It felt very unequitable. I really hope this does not happen again."*

- *"If we agree that voluteer-ism is only available to those with the privilege to afford it, the question then becomes: what are we willing to do to enable it?*

- *There are different reimbursement models we can consider for different levels of engagement.* ***There's the compensation frame, but we can also frame it as: 'how are we enabling participation for those who are constrained?'"***

- ***Paid compensation is one way to do that, but there are others as well — like a stipend model.*** *We could offer stipends that people can opt-in to claim, with no means test, to spend on whatever is helpful to them. For some it might be childcare, for others data or mobile bills, for others something else."*

Expand and simplify micro-grants to support community

"Micro-grants" are another way to reduce financial barriers, especially if reporting requirements and paperwork can be kept to a minimum.

- ***"Handing out easy-to-access micro grants for salons has proven to be successful***. *We successfully piloted a grant template + approval process that allowed local grants to be issued to support movement strategy conversations.*

  These are low-barrier, easy to access grants of a few hundred or up to a thousand dollars that allow community [members] to host a small event in ways that give them a sense of ownership and way of participating in the process."

- *"**We should simplify financial tracking for micro-grants.** Right now, there's not much difference in the financial reporting requirements for $50 versus a $50,000 contract. It was hard to get financial reporting from people, and a lot of administration was required on follow-ups for grants of small $ value."*

- *"It would have also helped to have office hours or individual meetings with all grant recipients at the outset to ensure they understood and had capacity to report on the grants."*

ESEAP Strategy Summit Day 1 - Indonesia and Timor Leste Group, Lady01v / CC BY-SA 4.0

Support diverse hiring practices

- ***"We could have used more specific help & guidelines on *how* to implement diverse and inclusive hiring practices**, versus the team being left to its own devices."*

- *"Support for staffing, especially on diversifying the team, would have been of huge value for us. Having less focus on North America for recruitment would have been great."*

- ***"The ability to use Safeguard and Upwork for hiring is invaluable.** It allows to hire people with the skills needed without issues of visas, etc. Some improvements are needed, but on the whole it was really great that we could hire when we needed and get the right people globally."*

19. Decentralize decision-making

"**Sometimes taking a step back from power** is a very powerful thing to do."

Reda Benkhadra presenting Strategy to Moroccan User Group members, [Farajiibrahim](#) / [CC BY-SA 4.0](#)

There was widespread sentiment from participants that the Wikimedia "movement" has historically been very siloed, and that the opportunity for greater collaboration and a more holistic big-picture view is vital.

- *"There's a sense of common identity and connection that emerges from asking folks to work together, and to engage each others' needs, limitations, challenges and operations."*

- ***"Historically, we have worked in silos.** Each group has their *own* Wikipedia, with their own inward-looking focus. Hopefully the Movement Strategy process worked to help overcome those silos."*

- *"**The process was the product,** in the sense that we are developing the relationships and competencies to move forward, separate and apart from the actual recommendations. The bigger goal is to build cross-collaborative functionality, because the community is and remains a highly localized set of individual communities."*

Power-sharing and inclusion

- ***"On the one hand we preach being open and collaborative, but on the other we know we can do that better.** Historically we tend to hear a lot from Europe and North America, as opposed to Africa, South America and Asia. Voices that haven't been heard over the last two decades are now making themselves heard."*

- ***"It was very important to raise this urgency, and the urgency for change** -- bringing people to the mindset that change is not something to be feared; it belongs to nature, to life, and to us as a movement."*

Momentum vs. process fatigue

- ***"A radically open process takes time. It takes a lot of time, and this can create fatigue for the participants.** That's why the 'make-or-break' point going forward is to bring the recommendations to life, to generate and implement positive changes."*

- ***"People are antsy to get going.** Many are tired of process and cycle. They want to know: what are we going to do? When are we going to do it?"*

- ***"The most important thing is to keep the momentum, to keep the spirit. This is going to be hard, because of the pandemic.*** *We are unable to have in-person meetings, which have been so valuable to build trust. This is a real risk. We need to find a way to balance that out, bridging the time we are unable to meet in large numbers in person.* **How do we figure out how to do this meaningfully online?"**

- ***"We're entering the phase that is the really hard part:*** *changing mindsets and habits. This is now the hard part where we need to be very honest, open and trust each other, and avoid blame when things go wrong."*

- ***"The key bit is: to get real, really quickly.*** *Through practical development of initiative and projects. And doing that in a distributed model, where there are many leaders across the movement and it is not all centrally organized."*

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) / [CC BY-SA 4.0](#)

Re-balancing power and decision-making

- *"In order for the strategy work to live up to its potential going forward, there is a very substantive conversation to be had around power and agency.* The upcoming work in front of us to create a Global Council and a Movement Charter are critical parts of this.

  This is an opportunity for the community, affiliates and chapters to manage more of their own affairs. To create more autonomy, self-organization, and self-determination, so that communities and chapters can decide in a more independent way."

- *"There needs to be a model for collective global decision-making.* A legitimate decision-making structure for the movement to make decisions for itself, based on decentralization and subsidiarity."*

- *"This would be healthy as an exercise in accountability, agency, and trust, and create empathy across these different bodies.* It would also be important from a power-sharing perspective, having a body that is explicitly representative of the full global movement, and that helps rebalance away from North American / European communities, so that members of emerging communities have equal voices."*

- *"It's going to be extremely hard, foundational to our future success, and super important. It's a maturation moment."*

Wikimedia Summit 2019 – Movement Strategy Process Core Team, Jason Krüger /

Applying lessons learned

- *"**These two milestones around Global Council and Movement Charter *have to* happen in this new people-centred, highly consultative way.** It's the *how* we do it that will determine their success."*

- *"**I think many people were skeptical of this approach to movement strategy.** But now we've proven that it's possible. Now I think we might have more political capital to spend on similar processes in the future."*

Communications is key going forward

- *"**All change is about the 'story.'** It's crucial to get the communications and storytelling right for the Transition and Implementation phases of the project. If*

we don't get this right, we run the risk of undermining all the work to date."

- *"**Communications needs to be seen as the key leadership role for this thing going forward.** It's a fundamental <u>leadership</u> question, not just a piece of the work."*

- *"**We're now shifting into Movement Strategy being owned across the movement** — but the coordination of updates and communications across that process still needs to be taken on as a key piece of work for the Foundation."*

20. Celebrate success. Make history together.

"I feel like I came out of this process

a different person."

East African Strategy Summit 2019 in Kampala, Wikimedia 2030, Movement Strategy. [Douglas Ssebaggala](#) / [CC BY-SA 4.0](#)

Some of what we heard from Movement Strategy participants, in terms of how it impacted them:

- *"We've made history by this being such a radically open and participatory process."*

- *"As a Strategy Liaison, I think Movement Strategy has achieved a major milestone."*

- *"We were able to admit our own mistakes and adjust and course correct."*

- *"The working group model is a pilot we can use for future collaboration efforts across the movement."*

- *"The amount that I have learned on this job outweighs any of the challenges and struggles."*

- ***"I think if we had really thought it through,"can we do strategy this way?",
the answer would probably have been: no.*** *But we did it anyway. The same is true of Wikipedia itself. If Wikipedia had been planned from the beginning, people would have said: 'it's not possible.' It doesn't work in theory, but it DOES work in practice."*

- ***"I am especially proud of inclusion and my work in working with underrepresented and marginalized communities, including women and LGBT+ voices that have been left out due to systematic bias.*** *Being able to support them to have equal opportunity to provide their inputs to shape our movement strategy has been one of the best accomplishments of this project."*

- ***"If we can include the missing voices, it positively impacts the entire process."***

*[Katherine Maher at] Conference Wiki Indaba 2018 - Tunis (16-18 March 2018), Hichem Bekhti / *

21. Publish a "how-to" manual.

This playbook is part historical record, part guide to working together better. Our hope for future iterations is that the guide to working together becomes a living document, and the go to page for tips and tricks. We want it to become a practical guide to doing work better together.

That's why we'd love to see people share their tools, methods and ideas for how they work together with their slice of the community.

If you have ideas to share, you can do so by adding them to the specially designed sections at the end of every chapter on meta-wiki. In the future we hope to aggregate and build on these suggestions to make the playbook as user friendly as possible.

You can find the meta-wiki version of this playbook [here](http://tiny.cc/movement-playbook).
(http://tiny.cc/movement-playbook)