

Organizational effectiveness tool

for Wikimedia organizations

How it works.

Why use this tool?

- ★ **Get better results.** Effectiveness is about how your organization gets results: doing what you do well even better, and improving what you don't yet do well. This tool helps your organization know where to improve.
- ★ **Prioritize.** There are many ways to be more effective, and building effectiveness can take resources, so your organization will need to set priorities. This tool helps your organization make a plan.
- ★ **Work in your context.** Some strategies for effectiveness are specific to or particularly important to organizations and groups working in the Wikimedia movement. This tool focuses on the most relevant strategies.

Who should use this tool?

- ★ This tool is built specifically by and **for Wikimedia organizations**.
- ★ By Wikimedia organizations we mean **user groups, chapters, thematic organizations**.
- ★ Other organizations or groups working in the Wikimedia movement will also find this tool helpful.
- ★ Other organizations may also find this tool useful, although it **focuses on strategies specific to Wikimedia-related work**.

What is the tool?

The tool has three parts:

- ★ **User guide:** helps you interpret your results report and make a plan
- ★ **Questionnaire:** will generate a results report about your organization
- ★ **Learning center:** has recommendations and resources

The tool is designed to help your organization make a capacity building plan, but different parts of the tool may be used in different ways.

How do we use the tool?

1. **Engage.** Review the user guide and set up a working group, and ask 3-7 people in your organization to take the questionnaire. You will receive a results report back from the TCC Group.
2. **Analyze.** Set up several sessions with your working group to consult the user guide and understand your report, and use the learning center to find recommendations and resources for any strategies you might prioritize.
3. **Plan.** Make a capacity building plan to help your organization become more effective, and have your organization discuss and adopt this plan.

Stage 1: Engage

- ★ **Review the instructions** in the user guide and any support materials that are helpful, and discuss using the tool with others in your organization.
- ★ **Establish a working group** of people in your organization interested in participating in and coordinating the process, and establish clear roles.
- ★ **Send the link to the questionnaire** to 3-7 people in your organization, and ask each of them to complete the questionnaire by a certain date, or set up a time to take the questionnaire together.

OPTIONAL: Contact the TCC Group or WMF for support.

Prepare

- ★ **Consult the user guide** and support materials before taking the questionnaire, to make sure you have a clear understanding of the process from start to finish. You will consult the user guide again after you receive your results report.
- ★ Make sure you have a group of **people who are committed** to going through the entire process. Responding to the questionnaire will take each person time, and many discussions will also be needed to interpret your results report and make a capacity building plan. You can use supporting materials, like this presentation, to show others in your organization how the tool works.

Questionnaire

- ★ The questionnaire contains strategies that are used by all Wikimedia organizations, as well as strategies that are used by only some Wikimedia organizations. You have the option to skip some sections.
- ★ If you have at least three people taking the questionnaire from your organization, you are likely get a more useful results report. These should be people with a good knowledge of your organization and its work, such as board members, staff, or key volunteers.
- ★ On request, the TCC Group can generate additional links for your organization, if you need to take the survey from the same IP address.

Stage 2: Analyze

- ★ Share the results report sent to you by the TCC group with your working group, or share the report more broadly to get additional input or ideas from people in your organization.
- ★ Create a schedule of meetings to discuss your results, and make sure the relevant people can be there. Moving through the full process of understanding your results and making a plan will take several sessions.
- ★ Consult the user guide as a starting point for discussing what the results report reveals about your organization's strengths and challenges. There are questions and suggestions in the user guide and learning center.

Results report

- ★ Your organization's results report is generated by the TCC Group after 3-7 people from your organization respond to the questionnaire.
- ★ The results report will combine the responses so you can see how the group understands how your organization is doing.
- ★ For the results report to be useful, your group will need to consult the user guide and discuss the results together.
- ★ Your results are not shared with the Wikimedia Foundation or any other organization, since they are compiled by the TCC group.

Strengths & challenges

- ★ What are your organization's strengths? Is your organization using your strengths effectively to achieve good results?
- ★ What are your organization's challenges? Does your organization have challenges or gaps in effectiveness that it will need to address to achieve good results?
- ★ What, if anything new, do these strengths and challenges reveal about your organization and your work?

Stage 3: Plan

- ★ After discussing your results report with your working group, consult the user guide and recommendations in the learning center to make a capacity building plan, to help your organization decide what to focus on.
- ★ Discuss your capacity building plan with people in your organization, including any decision makers, so your organization can understand and adopt the plan.
- ★ Once your capacity building plan is adopted by your organization, move forward with the next steps in the plan. Consider sharing your plan publicly so that others can learn from you.

Your capacity building plan

- ★ Understand your organization's strengths and challenges.
- ★ Use recommendations for different strategies to leverage your organization's strengths or address your organization's challenges.
- ★ Prioritize building capacity in areas that will help your organization the most, and create capacity building goals that are achievable.
- ★ Use the questions and the matrix provided in the user guide as an outline to get started with your plan.

How capacity building fits in

- ★ Your capacity building plan can complement other types of planning your organization might do, such as annual planning or strategic planning.
- ★ Capacity building complements your organization's annual planning and strategy processes, but does not replace them.
- ★ Your capacity building plan will focus on the ways your organization achieves results and how you can improve those strategies, rather than focusing on the results you will achieve or your priorities in the long term.

Tips for capacity building

- ★ Capacity building can require resources (time, focus, money, materials). Consider what you are investing when prioritizing different ways your organization can build capacity.
- ★ Capacity building is about both strengths and challenges. It's important to build capacity in areas where your organization is strong as well as filling obvious gaps. Your organization does not need to be good at everything.
- ★ Capacity building often takes time, and is a longer term project. Big changes do not happen overnight, and sometimes change needs to happen in stages.

More resources

Visit the [organizational effectiveness learning center](#), with links to community resources for different strategy areas.

If you need help using the tool or making your plan, contact Wikimedia Foundation at orgeffectiveness@wikimedia.org.