Wikimedia Deutschland e. V.
Gesellschaft zur Förderung Freien Wissens
https://wikimedia.de

Chapters Dialogue
Documentation of the Insights

https://meta.wikimedia.org/wiki/Chapters_Dialogue

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Executive Summary

Wikimedia is a global movement: the Wikimedia Foundation, the Wikimedia Chapters and the international communities work and fight for Free Knowledge. In spring 2013, Wikimedia Deutschland initiated a structured assessment of the movement organisations' needs, goals and stories: the Chapters Dialogue. Nicole Ebber led the project and hired Kira Krämer, who adapted the Design Thinking methodology to the process.

In the course of the project (August 2013-February 2014), 94 movement representatives (volunteers and staff) from Chapters, the Wikimedia Foundation as well as the Funds Dissemination Committee and the Affiliations Committee were interviewed.

The interviewees spoke about their understanding of roles and relationships within the movement, of responsibilities that come with being a Chapter or being the WMF. They described their goals and stories, what support they need and who they think is in a position to offer this support.

The synthesis of all the interviews resulted in an overall picture of the movement and a distillate of the most pressing issues. The findings and insights cover these main areas, which have had a great influence on the movement as it is today.

Lack of empathy and the persistence of old narratives: All the conflicts described in this report are based on causes that are deep rooted and manifested in people's perceptions about each other that still persist today. Each party in the movement has its own needs and tries to solve issues in its own interests, while lacking empathy for other views, opinions, contexts and behaviour.

Measuring success when exploring new territory: The movement lacks a definition of what impact actually means to it, as all Wikimedia activities can be described as exploring entirely new territory. Chapters struggle with proving that they and their activities are worth invested in while WMF has difficulty providing a clear movement strategy.

Organisational structures: Organisational structures have grown organically without any official recommendation for or analysis of the best organisational form to achieve impact. The lack of a shared understanding about the Chapters' role and contribution to the movement causes severe insecurities and is fuelling conflicts and misperceptions.

Money-driven decisions: Creating a consensus about money, its collection and responsible dissemination (donors' trust!) is scarcely possible. The Haifa trauma persistently blights the relationship between WMF and the Chapters, fuelled by additional disagreement about the new fundraising and grantmaking processes.

The gap in leadership: Who should take the leadership role and what should leadership in the Wikimedia movement look like? Adopting the narrowed focus, the WMF clearly states that it does not see the development of movement entities as their duty. Chapters on the other hand expect the WMF to take a leading role in Chapters' development, while the WMF expects Chapters to be more proactive.

None of these conflicts can be viewed in isolation, and no solution can be developed without a thorough understanding and frank conversations about the causes in the first place. We therefore consider that it would be highly irresponsible to suggest solutions to any of the described issues. Instead, we have distilled tough questions from the insights that need to be addressed urgently and answered in an open and comprehensive manner:

1. What do we as a movement want to achieve? Do we run a website or foster free knowledge? Why are we doing the things we do, and what for?
2. How do we define impact when exploring new territory? And how do we measure success?
3. What is the role of the Wikimedia Foundation?
4. How do we want to communicate with each other? How can we build the necessary empathy and learn from each other? How can we overcome the old narrative and perceptions?
5. Where does the money come from and where should it go? Should money be the limiting factor when striving for Free Knowledge?
6. What movement framework is best suited to fulfil the Wikimedia mission?

The way things are at present inhibits the movement from striving effectively for Free Knowledge. Instead of using its full potential to further its mission, it revolves around itself. The common mission is at serious risk if the movement does not tackle the causes of its problems.

These tough questions can only be approached in a structured and professional way, with dedication and commitment. There is no point in tinkering with the symptoms and finding single-problem solutions.

The Chapters Dialogue concludes with the recommendation to build upon the insights and to initiate a sequel: the design of a framework for the Wikimedia movement in which it can work strongly and effectively towards its mission in a professional way, yet stay true to its grassroots and maintain its diversity.

Context of the project

The history of the Wikimedia Movement officially starts with the creation of the English Wikipedia on 15 January 2001. Other language versions (German, French and Spanish) and sister projects were founded in the following months and years.

In 2003, Jimmy Wales announced the creation of the "Wikimedia Foundation", the official body to maintain and foster the Wikimedia projects. In 2004, the first Board of Trustees was set up and the community elected its first representatives to the Board.

In 2004, German Wikipedians founded an association called "Wikimedia Deutschland" to support the local Wikimedia community and to promote Free Knowledge in Germany. The first Wikimedia Chapter was born.

> *Chapters are independent organizations founded to support and promote the Wikimedia projects in a specified geographical region (country). Like the Wikimedia Foundation, they aim to "empower and engage people around the world to collect and develop educational content under a free license or in the public domain, and to disseminate it effectively and globally". 40 chapters currently exist, with at least one Chapter on every inhabited continent."*

In 2012, the Board of Trustees of the Wikimedia Foundation approved User Groups and Thematic Organisations as additional models of Wikimedia groups. As of July 2014, there are 40 Chapters, 1 Thematic Organisation and 12 User Groups officially recognised as Wikimedia affiliates.

Today, almost 500 Million people visit the Wikimedia projects, and more than 80,000 people are actively contributing to those projects every month.

[https://meta.wikimedia.org/wiki/File:Wikimedia_chapters.svg]

The following collection of links and documents gives an overview over the context, history and development of the Wikimedia movement.

Link	Date	Short description
[1]	10-2010	Paper "Managing Boundaries between Organizations and Communities: Comparing Creative Commons and Wikimedia" by Dobusch and Quack
[2]	08-2011	Wikimedia Foundation Board of Trustees letter regarding fundraising accountability ("Haifa letter")

[3]	01-2012	Collection of documents, discussions and decisions about the Fundraising and Funds Dissemination Discussion.
[4]	05-2012	Document "Framework for the Creation and Initial Operation of the FDC", by Sue Gardner (WMF)
[5]	10-2012	Document "Narrowing Focus", by Sue Gardner (WMF)
[6]	02-2013	Letter from the Board of Trustees regarding the Chapters Association
[7], [8], [9]	02-2013	Documents regarding the Governance Review process of Wikimedia UK
[10]	03-2013	Blog post "Wikimedia Chapters Association und Chapters Dialogue" by Delphine Ménard (then WMDE board member), in German
[11]	04-2013	Minutes of the Board of Trustees of their session April 18-19, 2013; section on "Guidance for the FDC"
[12]	09-2013	Annual report on the Funds Dissemination Committee process 2012-2013, chapter "The WMF Executive Director's Reflections on the FDC Process", by Sue Gardner (WMF)
[13]	2010/11	Movement roles project
[13]	11-2013	Board decision regarding FDC freeze and Chapter moratorium
[13a]	03-2011	"Organizational Growth & Development Network"
[14]	03-2012	Board resolution "Recognizing Models of Affiliations"
[15]	02-2006	Creation of the Chapters Committee
[16]	06-2003	Creation of the Wikimedia Foundation
[17]	11-2007	Appointment of Sue Gardner as ED
18	04-2014	Appointment of Lila Tretikov as ED
		Further documents
		Pages Wikimedia chapters, Affiliations Committee, Grants:APG/FDC Portal, Grants:Start, Wikimedia history, Wikimedia Chapters Association, Wikimedia Conference 2012,

		[Wikimedia Conference 2013](#) and [Wikimedia Conference 2014](#) on Meta
[14]		Homepage of the Wikimedia Foundation
[15]		Wikimedia blog (of the Foundation and of the movement)

About the Chapters Dialogue project

Our motivation

Wikimedia is a global movement: the [Wikimedia Foundation](#) runs projects such as Wikipedia and distributes movement funds among Wikimedians around the world. The international communities work and fight together for Free Knowledge. There is a huge network of Wikimedia organisations, all committed to our common mission: "A world in which every single human being can freely share in the sum of all knowledge." Together, we are all exploring new territory. We are facing challenges on our way influencing society and changing the world.

Wikimedia Chapters

[Wikimedia Chapters](#) are part of this international movement of Free Knowledge enthusiasts. They are crucial parts of our movement, covering a wide range of tasks and responsibilities. They work closely together with the local communities, cover financial and logistical support for projects to further our joint mission, facilitate the exchange of experiences, team up with partners from inside and outside the movement, and lead a whole lot of different programmes in support of Free Knowledge. While all Wikimedia Chapters are part of one movement, each Chapter has its unique set of goals, cultural values and knowledge.

The national Wikimedia Chapters play an important role in supporting the movement's diversity. Various cultures, points of view and experiences in spreading, defending and promoting Free Knowledge are important assets of the movement. Chapters need to develop, organise and collaborate with their stakeholders from within and outside the movement.

Lack of shared understanding

Within our movement, there is a lot of discussion – or dispute – about roles, relationships, responsibilities and the challenges the entities are facing. These discussions are often held behind closed doors and do not involve all affected parties, which again leads to uncertainty and speculation. And often, it seems that decisions only deal with the symptoms rather than addressing the cause behind the overall situation.

How does the movement build a shared understanding of what Chapters want to do? What are their wishes, roles, goals, and fears, what stories do they have to tell and what challenges are they facing? What support do they need in the different stages of development and who is in a

position to offer this support? And what kind of collaboration and relationship do their stakeholders – for example the Wikimedia Foundation, the Affiliations Committee and the Funds Dissemination Committee – need?

Kick-off
Wikimedia Deutschland wanted to find out. We wanted to find out what lies behind the all-embracing term "the Chapters". We felt that the movement needs a solid foundation of insights on which to base future plans and decisions.

In spring 2013, Wikimedia Deutschland kicked-off a structured assessment of the Chapters needs, goals and stories combined with a stakeholder survey. We called it "Chapters Dialogue", to emphasise the open and communicative character of the intention.

Project set-up

How was the project designed?
Wikimedia Deutschland sees its role not only in working together with the local German communities and stakeholders, but also in enabling cooperation among Chapters and with other movement players such as the Wikimedia Foundation. We were the first of the Chapters to put an "International Affairs" unit in place, to liaise between Wikimedia Deutschland and the movement. Nicole Ebber heads this unit and is shaping our collaboration and communication with the global Wikimedia entities.

Nicole has initiated and led the project. Pavel Richter, WMDE's Executive Director and Delphine Ménard, former WMDE board member, provided valuable input throughout the whole process. Their mentorship and vision were essential in making the Chapters Dialogue such a comprehensive and cooperative project.

[https://commons.wikimedia.org/wiki/File:Mil%C3%A1n,_Chapters_Conference_2013,_diskuzn%C3%AD_kruh.jpg]

In March 2013 we put a first outline up on Meta, presented our plans at the Wikimedia Conference in Milan in April 2013 and gathered more input from interested Wikimedians. On top of that, several people provided feedback on- and off-wiki, and helped Nicole to shape the final goals and scope of the endeavour. These feedback circles allowed us to steadily adjust and iteratively design the project outline.

It was clear from the outset that we needed qualitative research for this kind of project. There have been several attempts to collect data about the Chapters but rather than crunching numbers, we wanted to uncover their stories. And besides that, we wanted it to be huge! We wanted to approach complex questions concerning the joint promotion of the Wikimedia mission

pro-actively. We planned the project thoroughly and implemented it in a structured fashion, allocated the relevant resources and devoted ourselves to this task with dedication and commitment. In our view, these types of movement-related topics cannot be satisfactorily dealt with by setting up a Wiki page and a mailing list or by having isolated conversations.

An inside perspective combined with an outside view

Nicole created a [job advert](#) for a contractor to realise the research. We were looking for a person with the ability to shape and actively guide the dialogue, with knowledge of project management and interview techniques as well as experiences in survey design and analysis: someone who was more of a story collector than a story teller. We received several excellent applications from within and outside the movement. In the end, we decided to hire a person with no movement background at all. We gave preference to a researcher with a neutral perspective, without a personal Wikimedia history and agenda.

[Kira Krämer](#) started working for the Chapters Dialogue on 1 July 2013. She is a [Design Thinking](#) and user research expert with three years of professional experience, both running projects based on the user-centred approach and teaching the method to different types of organisations.

Who participated?

In order to get a comprehensive picture of the Chapters' goals, needs and stories, we decided to talk to representatives of all forty Chapters. Being the first and only Thematic Organisation in the Wikimedia affiliations model, [Amical Wikimedia](#) was also among our interviewees. We wanted to include different perspectives, and consequently also consulted with the Chapters' key stakeholders and partners.

Stakeholders are all individuals and entities that have an influence on and requirements towards a Chapter's work and structure. For a balanced view of the movement structures we had to understand the expectations, perceptions and fears of the [Wikimedia Foundation](#), the [Affiliations Committee](#) and the [Funds Dissemination Committee](#). For the scope of the Chapters Dialogue, we defined those three as the main stakeholders.

We were aware that it was not an exhaustive list of stakeholders, but we needed to draw a line for this first phase of the project somewhere. It would be especially valuable to include the community and the readers, as well as donors and like-minded organisations at a later stage of the research.

Our interview partners

We contacted all the Chapters and asked them to appoint their representatives for the interviews and put us in touch. The design of the process required us to interview two representatives of each Chapter: board members, former board members with profound knowledge about the Chapter's history or just a person with a deep understanding of the context, strengths and issues of the organisation. From Chapters with staff, we interviewed one staff and one board member.

From the circle of stakeholders, we selected the interviewees ourselves or followed recommendations from within the organisations and committees.

Some people were interviewed in their role as "experts" having a deep knowledge about the history and the context of the movement, but not necessarily a strong relationship to a movement entity.

The official part comprised interviews lasting 90 minutes. In addition, we tried to spend some time with the interviewees and their fellows for a chat over lunch or dinner. In this way, we were able to gain a deeper understanding about what matters to them, and to uncover stories from those who hadn't been interviewed officially..

Best stories are told face to face
For the successful completion of the Chapters Dialogue, it was crucial to interview as many people as possible face to face. We took advantage of different gatherings that took place in the course of the project: at the Iberoconf in Mexico City we interviewed four Spanish-speaking Chapters during one weekend; at the CEE Meeting 2013, we talked to six Chapters from Central and Eastern Europe and at the Diversity Conference 2013 we arranged meetings with some Chapter and Affiliations Committee members. In this way, we were able to organise the travelling in a more economical way.

Kira, sometimes accompanied by Nicole, visited around 15 Chapters in their hometowns around the world. The complete timeline is available on the Meta page, impressions from the world tour and photos from the interviewees are collected on the Facebook page of the Chapters Dialogue.

Furthermore, for logistical restrictions, some interviews had to be conducted via online audio or video call. Three chapters were not available for an interview.

Organisation	Number of people interviewed
Chapters (volunteers and staff)	67
Committees (AffCom + FDC)	8
Wikimedia Foundation (Board and staff)	14
Experts	5

In total, 94 movement representatives were interviewed. The huge majority were Chapter-related (67 people), 55 of whom were volunteers, twelve paid staff. Furthermore, Kira interviewed eight volunteers of the two committees (AffCom and FDC) and also twelve staff members of the

Wikimedia Foundation and two members of the Board of Trustees. Five people were interviewed as experts.

All interviews – if agreed upon by the interviewees – have been audio-recorded and transcribed afterwards. For privacy reasons, we will not make this material publicly available. The report contains no statement or comment attributable to any individual.

Methodology

Design Thinking

The creation of innovative solutions is complex and challenging, no matter if it is in regard to public services, policies or international relations. As existing waterfall processes are seen as less helpful due to their inflexibility in dealing with emergent or unforeseen circumstances, the need for new approaches to innovation has emerged. The following description is inspired by Ingo Rauth "A short introduction to Design Thinking, 2014".

Design was originally developed as a discipline to create new and unexpected outcomes given complex circumstances. While innovation has traditionally focused on technical, engineering based approaches, the problem of developing solutions for a complex and uncertain future poses different challenges. Design Thinking has been studied since the early 1960s, since when it has been argued by management scholars that the way designers think and work could benefit decision makers in dealing with complex problems.

But it was not until the early 2000s that a general approach to design ("Design Thinking") was articulated. In the most general sense, **Design Thinking** can be described as an approach for human centred innovation. It provides a **process framework and toolkit** that focuses strongly on the user's context, values and needs, and takes them as the starting point for the creation of meaningful solutions (products, services, processes, organisational structures etc.). The user perspective can help to provide alignment between diverse teams and organisational departments.

First, Design Thinking fosters the strength of collaboration and diversity. A **diverse team** will bring in different perspectives while thinking about ways to solve the challenge and different techniques support the process of collaborative idea generation. When observations or decisions take place in functional isolation, there is a risk that they will only be based on a fragmented understanding of the problem.

In the Design Thinking process, a strong emphasis is on a deep understanding of a challenge in its complexity, before starting to think about possible solutions. The first three phases of Design Thinking are therefore all about understanding the problem: **Understand, Observe and Synthesis.** Only a profound understanding and precise framing of a (complex) challenge permits the creation of relevant and meaningful solutions in the second half of Design Thinking which consists of the **Ideation, Prototyping & Testing and Implementation** phases. In this part of the process, the focus lies on the exploration of possible solutions by generating as many

ideas as possible, building quick and simple prototypes to make an idea tangible and testing it as early as possible with potential users.

The Design Thinking process has an **iterative** character – it promotes quick learning and improvement in any phase. For example, the feedback in the Testing phase provides learning that deepens the understanding of the problem. This learning can be used either to improve the prototype, or to come up with new ideas, or even to reframe the entire problem statement. This approach can protect organisations from failures that are costly both in terms of time and money. Instead, they can transform themselves into learning organisations that are aligned to the users' perspective and able to create excellent products, services, strategies and structures.

Last but not least there is the toughest part of Design Thinking: bringing a solution to life by implementing it. **Implementation** is not actually a part of the Design Thinking process, but rather a transition between Design Thinking and classic management: business (or non-profit) strategy, project management and all processes that are necessary to execute the defined strategy goals. Without implementation, even the best ideas won't have any impact.

Design Thinking Process
[https://commons.wikimedia.org/wiki/File:Design_Thinking_process_in_the_Chapters_Dialogue_project.png]

Understand and Observe both characterise the research part of the process. Instead of building ideas based onpersonal assumptions, it is valuable to understand the user's context, behaviour, underlying needs and challenges. **Understanding** characterises all types of desk research, including setting the framework for the field research and preparing the interviews, observations and immersions. **Observing** is the field research part, which means interviewing users, observing behaviour, immersion in situations and using cases.

The **research** that takes place in the Design Thinking process is of **qualitative** nature, while the quantitative part comes into play rather in the implementation phase of an idea. Both types of research are often combined, with, for example a quantitative analysis of the gathered insights from the qualitative research. If Design Thinking is applied in an explorative way in order to gain an understanding of a previous fuzzy problem or poorly defined, not fully understood problem (as opposed to User Testing for an existing product or service) - qualitative research is a valuable tool for that purpose.

Qualitative research can be very useful whenever it is necessary to dig into stories and to gain insights in complex situations with different stakeholders. It is a tool that helps to find patterns and contradictions in stories people tell.

The research phase is not only about collecting data (in form of stories and insights), but also about building **empathy**. Listening carefully and being empathic in regard to the personal context of the interviewee, without judgement or prejudice – permits the uncovering of surprising and

unexpected stories, aspects and challenges. At the same time, empathy for people and context needs to go hand in hand with rationality to analyse the situation.

In addition, considering all relevant stakeholders and their perspectives rather than only touching on isolated aspects of a challenge is of key importance. With an inclusive approach, which means talking to all stakeholders, it is more likely that a "**360° view**"**,** which is as little fragmented as possible, will be obtained. Building **empathy for all stakeholders** and their (often contradictory, opposing) viewpoints, allows for a meta-view of a complex topic.

The third phase in the Design Thinking process is **Synthesis**, which can also be described as problem framing. While Understanding and Observing all about collecting as much information as possible, Synthesis is about narrowing down the amount of information to its "nuggets". Synthesis means making sense of bits and pieces of information, grouping it into a whole picture and understanding relationships, causes and contradictions. Divergence and problems are often not expressed in a clear statement by users, but rather emerge through opposing ideas, values or requirements. By bringing together information from different sources, it is possible to uncover patterns that are not obvious in the beginning. The process of Synthesis is best supported by **visualisation** and can include various tools and frameworks, depending on the content, amount of time and goals of the project.

The second half of the process is about creating solutions by using different techniques for Idea Generation, Prototyping & Testing and bringing the idea to life through Implementation.

Once a precise problem statement has been framed, it is then about **Idea Generation**: a large number of ideas permits exploration of the different aspects of a problem. A diverse **team** will bring in different perspectives while thinking about ways to solve the challenge, and different techniques support the process of idea generation.

Prototyping & Testing is about translating an idea into something tangible and testing it with potential users. It can be a paper sketch, a role play, a Lego construction, a comic strip or just about anything that helps to explain the core value of an idea. Prototyping helps teams to align the core functions of an idea and to get quick feedback from users in order to learn from it. Users can interact with the prototype, which is far more valuable for feedback than only talking theoretically about an idea. A quick & dirty prototype invites users to review it critically, whereas shiny and "finished" prototypes will mostly receive feedback about their look and usability.

As **Implementation** is not a direct part of the Design Thinking process (yet a crucial factor for Innovation!), we will not go into detail about this topic. Please see theory on Strategic Management and Business Administration for further information.

All phases utilise a number of **techniques** (e.g. brainstorming, storytelling, visualisation) from various disciplines (business development, systemic thinking, service innovation, ethnography, lean software development etc.). Design Thinking can therefore also be considered as a toolbox.

It is not a newly invented method, but rather a framework that brings together existing tools and practices and makes use of them in different phases. Rather than strictly following procedures, it is more useful to adapt the principles of Design Thinking to the individual context.

Adapting the Design Thinking process to the Chapters Dialogue project

Choosing the Tools

Before starting such a project, it is important to get an idea about the individual culture of the organisation (here: the Wikimedia movement) because, as previously mentioned, all methods or tools need to fit the context. And if the tools don't work for the project, one needs to "hack" the tools. Kira therefore started by evaluating what kind of Design Thinking practices were relevant for the Chapters Dialogue.

The Wikimedia movement is international, with Chapters spread all over the world and run by people with the most varied backgrounds, all operating in highly differing social, economic and cultural systems. Each unique context setting needed to be taken into consideration when trying to create an understanding about the Wikimedia movement. How else could one understand the decisions and behaviour of those local organisations and their stakeholders?

We knew that we needed to work with a high level of empathy. This is why we chose to meet as many interviewees as possible personally and to visit them in their environment in order to gain a deep understanding about their work, their aspirations and their challenges. Building trust was a precondition for a fruitful interview and it was important to give each interviewee the space they needed to tell their own individual story.

In a movement so complex and diverse, it is only natural that the many opinions of its players are different, some even opposing and contradictory, controversial and emotional. The situation included a large group of organisations and individuals from all over the world, a complex history of the movement and different, interdependent issues and challenges all of them were facing. What was needed most in this situation was clarity. Clarity about the different perceptions, problems and challenges, presented in a frank and open way.

It was clear that this project was all about Understanding, Observing and Synthesis of insights. We set the goal of designing and conducting extensive story-based research, interviewing all the Chapters individually. Rather than crunching numbers, we were looking for stories. Qualitative research is best suited to finding patterns and contradictions in stories people tell. In the case of Chapters Dialogue, this was exactly what was needed.

The Design Thinking philosophy strongly emphasises empathic skills, which are crucial for any proper field research. Being a good "story collector" means properly listening to people, leading to meaningful insights about their concerns, beliefs and motivation.

Combining inside knowledge & outside perspective

One crucial aspect of such a project is the combination of inside knowledge and outside perspective. As the topics that we wanted to address were in part highly sensitive and emotional, we needed to approach them in a careful and respectful way. This was only possible by combining knowledge about movement culture, behaviour, rituals, must-haves and no-gos with methodological skills. Having both of these aspects go hand in hand was a key asset for the project.

This included:

- **A thorough briefing:** Nicole provided Kira with the basic knowledge about the Wikimedia movement, provided several links and documents (it's all on Meta!) and introduced her to Wikimedians from around the world.
- **Leadership and support by Nicole:** From strategic decisions and iterative alignment of the project goal and scope through to agreements on details and next steps, Nicole provided strong but participatory leadership. Since Kira was new to the movement, Nicole supported her in terms of communication and stakeholder involvement, introduced her to the target group and helped her to avoid possible pitfalls. This way, Kira could adjust her project management, methodology and execution accordingly.
- **Constant exchange of thoughts:** In the course of the project, we experienced so many mind-boggling situations and personalities and had to cope with greater and lesser challenges. All of that required a constant exchange of our own perceptions and alignment of our thoughts for subsequent decisions and actions. The synchronising was crucial for pushing the project forward together and prevented us from getting lost on the way to the next phase. And even if that does sound and challenging, we can say: Yes, it was a lot of fun, too!
- **Preparing all presentations together:** We paid special attention to the respective audience and each presentation pursued a particular goal. Preparing the presentations together helped us to again consider both the Wikimedia view and the Design Thinking approach. We presented the insights several times, and each presentation required re-definition and adjustment the presentation style, tone and final appeal.

The implementation of the project

Understand

To enable Kira to carry out a deep-dive into the complexity of the Wikimedia universe, Nicole prepared a collection of documents, links and stories, held long monologues and put Kira in touch with long-standing Wikimedians and colleagues at Wikimedia Deutschland. Fortunately, the Chapters Dialogue project could take advantage of a large amount of data that was already there. Kira dug into various data sources and collected input, questions and topics.

Having a huge pool of contacts, information and documents is crucial at this stage, and was a basis for Nicole and Kira to use to create an extensive questionnaire that would cover all topics we wanted to focus on in the research. We also decided that we needed different questionnaires

[for Chapters and Stakeholders](#) in order to ensure different roles and perspectives were accurately surveyed. It took some drafts and feedback-loops until we got the [first version](#) and were ready to start the interviews.

Kira conducted the first interviews with stakeholders (one representative each from WMF and the Affiliations Committee) and fours Chapters (Wikimedia Australia, Estonia, South Africa and Taiwan) at Wikimania in [Hong Kong in August 2013](#). We improved the [research questions](#) based on the feedback we gathered during our [kick-off session at Wikimania](#), the first interviews and several one-on-one conversations.

Observe
The heart of the project was the actual interviews: Kira interviewed volunteers and staff from Wikimedia Chapters, the Wikimedia Foundation, the FDC and the AffCom in order to find out what matters to each of them.

To make this possible it was necessary
● to plan the journeys,
● to meet the logistical challenge of arranging the interviews,
● to contact and brief the participants about the project,
● to schedule and re-schedule the appointments,
● to book and re-book tickets and accommodation,
● to fill in visa applications,
● and to send countless emails and make many, many phone calls.

Throughout the project, we needed to adjust the "tourdates" according to the availability of interviewees, the complexity of the matter itself, or other unexpected events. Professional and reliable administration is the backbone of a project with such a scope. The support and participation of volunteers and staff at WMDE, WMF and participating entities enabled us to handle the logistics within the tight timeline. We experienced great hospitality and commitment from all over the world.

Kira had to travel many miles in the course of the research. She needed to adjust to time-zones, languages, climate and cultural habits, convince airport security that her sound recorder was not a weapon, until she finally reached the destination: meeting her interviewees face to face. It was quite an adventure, and the interviews took place in all sorts of locations: offices, hotel lobbies, cafés, restaurants, by night on the Zócalo in Mexico City, during train rides and even on pyramids. Evidence can be found in the [Chapters Dialogue Facebook](#) stream.

While an official interview lasted around 90 minutes, we always tried to spend some extra time with the interviewees, in their office with the rest of the team, at lunch or dinner or during a stroll through their hometown. This extra time was of significant importance, as many interesting aspects were revealed after the official interview was over – sometimes really the very minute after the sound recorder was switched off. During casual talk people tend to open up and provide

either additional information that deepens the understanding of their story or even new and sometimes surprising aspects that didn't come up during the interview at all. In addition, people who were not official interviewees had the chance to tell their version of the narrative. Even the smallest remark was sometimes really useful and uncovered valuable insights.

For organisational reasons, some of the interviews were done via video conferencing. Even if we knew that a conference call would not deliver the same quality as a face-to-face interview, in some cases it was unavoidable. Our caution was confirmed: especially when meeting for the first time, a conference call can be a bit awkward (socially and technically). It is hard to create an atmosphere of trust, and it does not allow for extra "unofficial" time that is so valuable for the interviews. We therefore limited the number of video conferencing interviews to a minimum, but were glad that this gave us the chance to have additional and – nevertheless – valuable conversations.

Either way, Kira worked through the travel and interview schedule and dug deep into the trials and tribulations of the Wikimedia universe. Countless notebooks (paper ones!) were filled, new questions arose, hundreds of topics were discussed, and the quantity of stories grew steadily. Between September 2013 and March 2014, she had collected personal stories from 94 individuals.

Iteration and participation
A very important aspect of Design Thinking is its iterative character. Everything from tools to ideas and prototypes can and should be adjusted or completely changed based on what is learned during the process. This approach fitted very well with the openness of the Wikimedia movement and the working culture at Wikimedia Deutschland. It provided the Chapters Dialogue team with a lot of flexibility and enabled us to iterate the research design and steadily improve its quality. We wanted to conduct the research project in an open and transparent way, calling on all the Chapters and interested people for active participation.

Iteration meant for us:
- Permitting and fostering the **improvement and re-design** of the process in the course of the project.
- Being bold and open towards **possible outcomes**. The project had to focus on problems and not – like many other research projects – on solutions.
- **Co-creation** by encouraging participation in creating the questionnaire on Meta: we wanted to draw on existing knowledge and consult with experts and mentors. This provided a good basis for our next steps.
- **Testing the research procedure**: Before starting with the interviews, we asked some of the participants if they were willing to be the first test interviewees. We set up a few test interviews at Wikimania in Hong Kong which provided Kira with a sense of which questions were useful, which questions and aspects were missing, what order of

questions was best for the interview flow, the number of questions and topics that could realistically be covered in 90 minutes etc.

- **Adjusting the questionnaire:** Based on the insights of the interviews, we revised and improved the questionnaire, meaning that the answers provided in one interview shaped the questions for the next interview, and we kept improving the procedure in the course of the project.
- The **quality of the interviews** improved, too: with every interview, Kira was able to learn more about the Wikimedia movement. Her increasing knowledge allowed her to identify coherences, to ask more precise questions and to follow up on topics more profoundly.
- **Constant feedback** from several people from within and outside the movement helped us to regularly cross-check whether we were on the right track. Constructive criticism led to slight corrections to the course of the project.
- **Rehearsing and live-testing of parts of the presentation** at the retreat of the Chapters' Executive Directors (Berlin, February 2014) and at the [Board Training Workshop](#) (London, March 2014) was crucial for designing the final presentation.
- **Participation:** From the project kick-off onwards, we involved movement players via online and offline discussions. This led to invaluable support and was essential for ensuring the commitment of the parties involved.

Instead of just setting up Meta pages and getting lost in endless mailing list discussions we went for a coordinated and structured approach. Staying flexible, adjusting throughout the process and allowing participation were the keys for this project smoothly and successfully running in a professional way.

Synthesis

The synthesis was the trickiest part of the project. The amount of data and information we gathered in the research phase was huge. From March until the final presentation on 11 April 2014, Kira documented the key statements and background stories from the interviews in hand-written notes, we audio recorded almost all interviews (subject to the approval of the interviewees) and had them transcribed. But how to make sense of all that data? How were we to find commonalities and differences? And finally, how were we to create an understandable yet comprehensive summary of it all?

The art of synthesis lies in paying attention to details and interesting quotes, but keeping the whole picture in mind at the same time. The various stories needed to be condensed into one narrative that could be told to the movement. Our goal was to mirror the movement, to present the whole picture of what it actually is, what people care about and where the trouble spots are.

For the synthesis of a large amount of information, a visual process is of paramount importance. Mapping information visually enables an overview of a complex topic to be obtained which is very much harder to get by just reading hundreds of pages of written text. Information can be

processed more easily when it can be seen at a glance, bits of information on sticky notes can be rearranged, clusters can be created and coherences of different topics can be identified.

Having information presented visually also permits it to be shared with people who are less involved, and for feedback to be received, information to be restructured and everything to be grouped in one spot. Co-creation was crucial for this project, as several brains were needed to process and digest all the information.

The visual process is supported by the extensive use of sticky notes notes in order to "extend one's own brain" onto walls, windows and whiteboards. The content needed space to develop, interconnect and grow. It was impossible to map it all at one desk. Wikimedia Deutschland's spacious office and the cooperative WMDE staff provided the perfect conditions: we were able to work in a huge and bright room that not only provided space for sticky notes, but also for thoughts, action and creativity.

After setting the scene, the actual work could begin: we shuffled the information a hundred times – that's where the flexibility of the sticky notes and whiteboards paid off – and looked at it from all possible angles. We tried to distil the key issues and bring order and clarity into the mass of information. It was a process of building an understanding, of learning, of challenging assumptions, of finding and losing the common thread. It took a good chunk of time, countless discussions and iterations to bring clarity into the "creative chaos".

As a preparation for the final presentation, we took the chance to present a preview of the insights during the Chapters' Executive Directors' retreat (February 2014, Berlin) and the Board Training Workshop in London (March 2014).

Final presentation
[https://commons.wikimedia.org/wiki/File:WMCON_2014_-_Wikimedia_Chapters_Dialogue_results_presentation.jpg]

The Wikimedia Conference (April 2014, Berlin) provided the perfect setting for our final presentation (60 mins, ~120 people in the audience). All the work from the previous nine months culminated there. The Chapters Dialogue was all about stories and so was the presentation.

Rather than using presentation slides, we decided to tell the story with the same tools we used for the synthesis: whiteboards and sticky notes. This allowed the audience to witness the creation of the story, to keep track of the bigger picture and to use the material to relate subsequent discussions to it. The big advantage of the flexible setting was that it does not look as if it was cast in stone, as if people could not disagree with it and build upon it.

Half of the people in the audience indicated that they had been interviewed in the course of the project. The feedback after the presentation was overwhelming, and discussions in the following days often related to this presentation. While one of our main goals for the project and the

presentation was to point to the "elephant in the room" and enable people to finally realise and talk openly about the trouble spots within the movement, several people expected very concrete and detailed solutions.

We refrained from presenting recommendations for concrete action because we think more analysis, consultation and cooperative approaches are required. We ended the presentation with six tough questions, that the movement urgently needs to address in a structured and coordinated way.

Documentation
The documentation (written report, short movie) took us way longer than expected. Only the glorious team work of Madame "I know the perfect phrasing for EVERYTHING" Ebber, Miss "Tarzan in the insights jungle" Krämer and Mister "Knight in shining armor" Kibelka made the publication of this document possible in August 2014.

Insights of the Research

The Chapters Dialogue project is all about understanding, not about presenting solutions. The following "insights" rather are an extensive summary of the interviews Kira conducted and the stories she was told.

Cause and motivation

Why is Wikimedia so great?
Among all interviewees, the first thing that was really obvious was the passion they have for their work, for Wikipedia, for Wikimedia and for Free Knowledge. There is a great sense of pride in belonging to this movement and in the excellent achievements of the Wikiverse.

The Wikimedia cause is vast, complex and huge – and above all, it is highly important. It has an impact on the whole of society. Wikipedia, as its main project, profoundly changed the way in which knowledge is produced, distributed and consumed. It made Brockhaus and Encyclopaedia Britannica– things that were taken for granted only 10 years ago – obsolete. Wikimedia Commons, for example, has already overtaken many big photo stock websites, providing free media for everyone and for every use. Wikidata is the biggest systematic approach to collecting structured data in the entire world. In short: Wikimedia is a young movement yet it has achieved tremendous things.

The **global footprint** of the Wikimedia projects is massive:
- It's **massive**: More than [80,400 users per month](#) regularly edit within the Wikimedia projects. Wikipedia alone is the fifth most visited page in the world.
- It's **collaborative**: Wikimedians have collectively put together a huge amount of knowledge, across borders. It's one of the largest (or possibly even the largest) collaboration projects on earth. And it's no longer a small elite writing an encyclopaedia, but people from all over the world contributing to a joint mission.
- It's **empowering**: It's the single most empowering project in the world. It empowers people to create knowledge and to share it with others. Wikimedians are proud: "I am no longer just a knowledge consumer, I can create knowledge!"
- It's **user-centred**: The Wikimedia projects have the best localised software in the world. The community tackles all language issues, no matter if it's left-to-right or right-to-left writing, special fonts, numbers etc. Developers and the huge community go that extra mile for the users – many big companies don't.
- It's **free** and **accessible** for everyone: All the world can participate. It's always up-to-date and no journalist, student, manager or teacher can imagine a life without this incredible source of knowledge.
- It **protects privacy**: The Wikipedia projects don't track their users and they provide full privacy. That's exceptional.

- It defends **Free Knowledge**: Governments are forcing borders on the internet, selling information, introducing censorship. The Wikimedia movement is an anchor in this fast-changing world.
- And it has **offline impact**: It has ignited huge change in the offline world too. From making knowledge available at no cost with Wikipedia Zero, through bringing Wikimedians from all over the world together for offline gatherings and projects, to influencing society, legislation or local education systems – there are countless activities and programmes created and run by Wikimedia.

Passion & Individual Motivation
[https://commons.wikimedia.org/wiki/File:Wikimania_2013_Group_Photograph.JPG]
All over the world, Wikimedians are striving passionately for Free Knowledge. All of them are fascinated by Wikipedia and the movement. Many are addicted to it. Some even dedicate their life to it. The date and hour when they signed up on Wikipedia is remembered like a second birthday; the Wikipedia globe is carried on t-shirts and badges, even as a tattoo on the skin.

The feeling of contributing something that is useful for other people is a major driving force for many Wikipedians. Being part of this tectonic shift in the creation and consumption of knowledge is exhilarating. Seeing others using Wikipedia, possibly even reading an article that you have created, generates a feeling of pride, confidence, happiness.

"A map I uploaded was shown in a huge soccer stadium, and one newspaper published my article. That's just awesome and makes me feel so proud!"

There is strong identification and commitment. People are ready to invest hugely – whether as an editor in Wikipedia, in sister projects or as an activist in offline activities. The sense of being "part of this crazy amazing thing" even exceeds time capacities and personal limits.

"I spend ¼ of my salary for Wikipedia activities"
"It's crazy that I do all this… I don't know why… I just have to."
"I'm totally addicted to Wikipedia."
"I've spent 30 hours per week with Wikipedia activities. That was almost like a full-time job."

Every person who was interviewed is unique. They live in different countries, speak different languages, belong to different cultures, and live under different economic and societal conditions. And they all have their own dream about what they want to do and why.

"I do it for my country."
"I want to democratise knowledge."
"I want to deliver education to people in my country."
"I want to support my local editing community."

All of them want to share their excitement about Wikipedia: "You only know this excitement when you have done it – and I want to share this feeling". Out of a small group of editors in only a few language versions of Wikipedia, a huge global community has evolved, with countless sub-communities, groups, committees, organisations – and personalities.

Tendency to form groups: Wikimedia Chapters

There is a great tendency among active Wikimedia volunteers to form groups, to connect with like-minded people, to create a framework for the urge to accomplish more than just editing. Why sit alone in front of the computer when there are great people out there, striving for exactly the same thing? Why not getting organised, take this excitement and enthusiasm and create something even greater out of it? The most common framework for formal groups is Chapters.

Several people who were interviewed see Chapters as being the best vehicle to move the mission forward at a local level. They have the necessary knowledge about the local culture, language, laws and economic situation.

This enables them to do all sorts of different things: they can put Wikimedia values across to stakeholders in their country, reach out to institutions and the broader public, liberate content and influence legislation, teach how to edit Wikipedia, gain new followers and volunteers, enable volunteers to run projects, build relationships with donors and the media, and many more. Chapters can find the fitting paths to further the mission in their country.

In addition, volunteer time and enthusiasm is considered to be the most valuable and scarce resource of the movement. With their local knowledge, Chapters consider themselves to have the best capability to engage with volunteers and to recruit new volunteers.

Not all of the Chapters are the same - in fact, they differ highly within different categories: size, age, experience, staff or volunteer drive, funding structure, program portfolio and development path. And, of course, they are created by individuals who again have their own dream about translating the global mission to their local activities. Comparing Chapters is therefore challenging.

What unifies the Chapters is the fact that they are formed of enthusiasts who have found a framework within which they can allow their talents and passion to unfold. There is a tremendous will to contribute something, to make a change, to have an impact.

"I finally can work with like-minded people."
"It's the best work of my life."

But not only that, through their activities, Chapters can contribute to a meaningful mission in general, and create an impact in their own country. There is a great sense of pride and support

for their own country. This does not lead back to pure patriotism, but instead is addressing attempts to enhance the legal or learning situation in particular countries.

Their Chapter provides the volunteers with the sense of being part of something big. They can leverage the efforts towards the mission on a local level. Within the network of Wikimedia organisations, Chapters see themselves as the "arms and legs" of the Wikimedia Foundation. Or the eyes: without them, "the Foundation would be blind".

This is one view.

How does the WMF view the Chapters?

The [Wikimedia Foundation (WMF)](#) puts huge efforts into improving the projects and making them even more successful. Among other things, they maintain the gigantic volume of traffic, work steadily on improving the platforms and solve highly complex legal issues in order to defend the idea of Free Knowledge. The WMF is facing a lot of pressure from the public and needs courage and strength to defend and protect the values of Wikimedia.

Besides these responsibilities, it is also the leading grant-making organisation in the global movement. From grants for individuals to annual plan funding for Wikimedia organisations, the WMF disseminates the money that has been entrusted to the movement by millions of donors.

The WMF's main value therefore is donors' trust and its main task is to treat donor's money responsibly and to protect the Wikimedia projects, brand, trademarks and integrity. Seen from this perspective, Chapters could be a risk:

Certain actions could do unintentionaly harm to the brand, donors' money could be spent in an irresponsible way, governance issues or another "scandal in Wiki-land" could affect the reputation of the whole movement. In order to fulfill its main responsibilities, the WMF sometimes needs to take actions that are not always in the interests of a Chapter, but that are reasonable considering its position and duties.

One has to consider that the WMF is an evolving organisation too. The movement grew quickly, and so did the number of affiliates, the funds that needed to be administered and the projects that required attention. The complexity grew tremendously and due to its global, high-impact activities, all sorts of emerging challenges needed to be tackled. The WMF always tried to do the best possible job, but it wasn't perfect either: some decisions could have been based on a broader dialogue and mutual empathy; others were perceived as being very poorly communicated. This fuelled the perception of the WMF as being unapproachable, a bit unpredictable, even "mean" towards its Chapters.

What makes things even more complicated is the fact that each Chapter engages in different activities and is embedded in a highly individual context. Consequently, the WMF is dealing with

forty organisations, none of which is like another. But the WMF needs to have a general overview of things and cannot always anticipate the individual situation of every single organisation.

Hiding and insecurity

As a consequence, some of the Chapters weren't sure about how the WMF perceived them.

"Do they understand my situation and my needs?"
"Do they even care about it?"
"Do they value my work?"
"Do they trust me?"

These questions remained unanswered and were therefore causing insecurity. Gossip started, bonds were formed and a gap was created: there is "this WMF" that is a big, powerful organisation, far away in San Francisco. This distance was perceived not only on a geographical level, but also emotionally.

The ongoing insecurity of Chapters and the perceived power of the WMF led to a couple of Chapters in effect hiding away. "*Rather than being on the radar, I'd better stay quiet and safe*". Some Chapters, even if it wasn't a conscious choice, started building walls to hide behind.

Different languages, time zones and a lack of face-to-face communication contributed to this mismatch. And although many things have changed for the better, the old narrative is still present in the heads of some people. Even if communication and support have improved over the years, old sores reopen quickly.

Exploring new territory

[https://commons.wikimedia.org/wiki/File:Apollo_AS12-47-6897.jpg]
Chapters are aware of the fact that they are perceived as a risk, and this puts them in a very uncomfortable position. They realise that they need to prove that they are worthy of being invested in, and they are willing to prove it – but how?

The activities of Wikimedia can be described as exploring entirely new territory. The movement is doing things no one has ever done before, and there are no books out there that will just tell them what to do. Instead, it's about trial and error. All organisations need to experiment in order to create space for new ideas and innovation and to explore what approaches are meaningful and reasonable in their individual context. They need to work out: What are the right things to do?

This is not so easy, as there is a sense of insecurity among Chapters considering their recognition and appreciation by the WMF. As a consequence, Chapters are instead sticking to the stuff others have done that has received a degree of approval, recognition and funding. After all, that seems to be a safe bet. People don't want to be too much on the radar with new experiments. This again is at odds with their wish to experiment and to create activities that suit

their unique context and their corresponding needs. How does this go together with the movement's claim "Be Bold!"?

Chapters need to balance experiments carefully with those "safe bets" – but it is a challenging task. It is not only Chapters struggling to define their goals, but also the WMF. In fact, the entire movement needs to figure out what it wants to achieve and how this can be done. So far, the common ground is created by the movement's claim "Imagine a world in which every single human being can freely share in the sum of all knowledge". Yet it can be interpreted in several ways. Until now, there has been no obvious agreement on a common interpretation. Even basic terms like "volunteer", "community" and "impact" have been used in various ways by different interviewees. Considering the fact that these are three of the most used vocabulary in the movement, it's understandable that people struggle with defining the essentials.

Defining volunteers and community

What exactly is a volunteer?
When people use the term volunteers, they think of one or several or possibly even all of these terms at the same time:

- Editor
- Chapter member
- Active member
- Board member
- Community member
- Committee member
- Wikipedian
- Wikimedian

And the term does not only relate to their main affiliation, but may also refer to their main activities. Volunteers can be described by one, two or several of following categories:

- Online volunteers
- Offline volunteers
- "Newbie" volunteers
- Veterans
- One-off volunteers
- Long-term participating volunteers, heavily involved
- Project initiators and leaders

In addition, almost any combination of the above is possible, the spectrum is huge. So when talking about "empowering volunteers", what exactly is meant by that?

What does volunteering mean?
As mentioned previously, all Chapters operate in an individual context and therefore need to deal with different sorts of conditions, which, in turn, influence the understanding of volunteering.

- **Regulatory policy:** Does the government promote volunteering activities? Are volunteering activities receiving support?
- **Cultural habits and society:** Volunteering can be applied to more or less any area, ranging from providing shelter and food to people, helping after a hurricane, taking care of old or disabled people, teaching school children and many more. But what about Free Knowledge? And is there a culture of volunteering at all?
- **Economy:** Are people wealthy? Do they have time for volunteering?
- **Education:** What does Free Knowledge mean to people? Is it about providing basic education for people without access to it? Or is it about engaging in activities that promote e.g. free licences and the corresponding laws?
- **Size of the country:** Is it easy to coordinate (volunteer) people and activities or is it a logistical nightmare?

These questions have a big influence on the understanding of volunteering. Each Chapter needs to find answers, and these answers influence what type of activities a Chapter focuses on, what services it offers to volunteers and how it forms its strategy in general. There are no common guidelines on the meaning of volunteering, but they would be needed if a solid basis for creating a movement strategy and defining measurement of its success were to be created.

Who is "the community"?
The definition of the term community has been similarly ambigue. There are several questions arising from listening to Wikimedians talking about the community:

- Who is part of the community and who is not?
- Editors? Chapters? Partner organisations? Only volunteers? Or staff members as well?
- Are WMF staff part of the community? What about the Board of Trustees?
- Is there a unified community? Or several sub-communities?
- How do Chapters relate to "the community"? Do they have "their own" community?
- How does WMF relate to the community?
- What do "serving the community" and "creating value for the community" mean?
- How does the term "movement" relate to the term "community"?

The consequence of this is fuzziness and everyone is free to bring in their own interpretation. And if everyone is drawing their own conclusions, next steps and actions are individual rather than streamlined among movement entities.

Diversity of Chapters

Another challenge is the number and diversity of affiliates in the Wikimedia movement. As described previously, Chapters differ not only in size, age and scope of activities, but also in the pre-conditions under which they are operating in. There are several aspects that influence the goals, activities, practices, tasks and tools of Chapters. To give just a few examples for each category:

- **Regulatory policy:** Is foreign currency allowed in the country? Can the organisation receive foreign currency funding (from WMF)? Is there any financial support for non-governmental Organisations (e.g. law providing for 1% of taxes to go to non-profits; gift aid)? Is an NGO that cooperates with an American foundation considered a political risk? Which areas are regulated? Censorship? etc.
- **Cultural habits and society:** Is there a culture of volunteering? Do people care about Free Knowledge? What does Free Knowledge mean for people? How open is the society? What role does technology play in society and in daily life?
- **Economy:** What is the wealth level? Do people donate? Do people have time for volunteering? Can people pay membership fees? Will institutions collaborate for free or do they expect something in return (e.g. advertising, influence on content)? What stage of development is the country at?
- **Education:** What is the level of education? Do all people have access to education? Is education (e.g. about history) influenced by the current political leadership? What does this country need most in terms of knowledge and education?
- **Meaning of volunteering:** Does volunteering mean to provide shelter and food to people, rather than Free Knowledge? (see …)
- **Size of country:** Is the country large and makes coordinating people and activities very difficult? Or is it small, with a good transportation system making it easy to coordinate meet-ups?
- **Language:** Is more than one language spoken in one country? Does the country share its language with other countries? Do people have English skills in order to communicate with the international community?

All these dimensions come into play when Chapters come to interpret the mission and will have a big influence in defining the respective goals, priorities and activities.

The variety of activities is almost countless, making it a big challenge to compare, to measure and to evaluate. One Chapter will be offering students the opportunity to fulfill their university-required "social service" by editing Wikipedia; another Chapter will set up a Wiki for a local indigenous language and therefore increase the chance that the language will get governmental support; a third Chapter will invest in advocacy activities concerning copyright issues; a fourth will have many like-minded organisations in proximity and building collaboration, a fifth with be the "lonely nut" fighting all alone for the idea of Free Knowledge, and so on.

Given the situation that there is no movement-wide agreement about goals and activities, each of the Chapters selects goals and activities that seems to be the most meaningful for its own situation.

Measuring success

Impact is another term that was frequently used but where we did not see much consensus regarding its meaning and measurement. The discussion about impact and metrics is very prominent in the movement, and it revolves around the question: What data and metrics are needed that can show the success or failure of activities?

Of course, it is difficult to define metrics if the essential and basic question is remaining without answers: "What are the right things to do?". Consequently, even those activities and projects that have received approval (via grants, via consecutive or repetitive execution, or by being featured in the press) are not proven to have a definite impact.

The WMF faces a lot of pressure from its stakeholders and needs to ensure responsible handling of donors' money, worldwide. They need to "detect the black sheep" that could exploit the openness of the Wikimedia movement. Therefore, there need to be rules: metrics, measurements and application procedures. Due to the high complexity, not all of them can be tailored according to individual context needs. WMF intends to create processes that are fair, participatory and used as an advising and learning tool. Together with programme leaders from within the ranks of Chapters and the community, the WMF is developing metrics, evaluation tools and learning patterns.

Yet, Chapters are having difficulties to to apply metrics and processes in order to justify their budget and prove the impact of their activities.

As described in chapter X, the goals and values are influenced by the individual context of each Wikimedian or Wikimedia organisation. And with differing goals there are differing conceptions of success. In addition, most Wikimedians are driven by the volunteerism, by the great sense of doing something good. They often conduct all these activities in their free time, in addition to their full-time job or university studies. For some, being an active volunteer and engaging in different activities already *is* a success.

In the eyes of many Chapters, this volunteer spirit should be celebrated, but instead – as many see it – attempts are made to try to measure it and to compare it to metrics and processes, to frameworks of efficiency and effectiveness. For many Wikimedians, it feels as if they need to "force themselves" into the established metrics of the WMF, in order to fit somehow.

In many cases, Chapters are engaging in "on the ground" basic work in terms of Free Knowledge (exploring new territory). It is known that in some areas, like education, are reacting very slowly to any change and that activities in the present might show their effects only in ten or

twenty years. Consequently, there are no immediate results of Chapters' activities. For short-term activities, one could measure the outcome in Kilobyte text that has been created in the course of a project, but how about long-term impact work? Some activities are created from scratch, without a blueprint from other organisations, and it's hard to tell how their impact can be measured. Many interviewees stated that they have difficulties to directly translate their activities into success measures. In this situation, Chapters fear that they might look useless and unsuccessful – and this feeds back to the existing insecurity.

To sum up, the topics metrics, measurements and reports are a big source of frustration among Chapters. At the same time, no matter if it's the WMF, the FDC or affiliates, the whole movement is going through the challenge of evaluating its work in an adequate way. The key question remains: How can the movement combine experimentation and exploration of new territory with solid metrics?

Fundraising and funds dissemination

All the unanswered questions inevitably lead to the next topic, which came up sooner or later in most interviews: money. The movement is wholly funded by donations and collects donations all over the world. Donated money needs to be dealt with responsibly, and some of the funds are disseminated to all parts of the world.

The average donation is around 15 USD and millions of people donate to the Wikimedia cause each year. The biggest chunk of money is collected during the annual fundraising campaigns, using banners all over the Wikimedia projects. In 2010, alongside the WMF, 12 Chapters were "payment processing", doing their own fundraising campaign at the end of the year.

The Haifa letter

At Wikimania in Haifa in 2011, the Board of Trustees announced their decision to revise this fundraising strategy and "take away the fundraiser" from several Chapters. Resulting from that decision and after a long and heated debate, the Funds Dissemination Committee (FDC) was set up and with Chapters in Germany, France, Switzerland and the United Kingdom, four Chapters were able to extend their fundraising agreement.

Not all Chapters were happy with this new regulation. The way the "Haifa decision" was communicated had a huge impact on the relationship between the WMF and the Chapters. Chapters were not given the opportunity to comment on the "Haifa letter" prior to its publication and this fuelled the reputation of the WMF board's decisions as coming out of the blue and being unpredictable. It left many Chapters paralysed, insecure and frightened about what might come next. The term "Haifa trauma" was used frequently in the interviews.

"They took our autonomy!", members of former payment processing Chapters claim. Payment processing created a sense of being in charge of handling money, of taking decisions and of

carrying responsibility. Additionally, autonomous fundraising brought various benefits: Chapters could make use of gift aid or other financial benefits; they could create attention via donation campaigns; they were in direct touch with their donors, and they could attract new members or editors through their donors contact base. With the new regulation, some Chapters claimed, this "buzz" disappeared.

While the WMF and FDC try to communicate the new regulations as being a valuable learning tool, these efforts have only rarely succeeded. The episode has left a raw wound and a lot of effort will be required to rebuild trust. *"The change (Haifa) was necessary. But, admittedly, it was communicated in a very poor way. Chapters were right to feel desperate and helpless."* a FDC-member admits.

Funds Dissemination Committee

Instead of processing their own payments, Chapters can now apply to the Funds Dissemination Committee (FDC) in order to receive annual grants.

"The goal of the Funds Dissemination Committee (FDC) is to help make decisions about how to effectively allocate movement funds to achieve Wikimedia's mission, vision, and strategy. The Board of Trustees [resolved] to create the FDC as a body that would advise the Board on how to divide and disseminate movement funds between the different movement groups on a no entitlement basis. [...] The FDC will strive to be a center of excellence in the movement by holding entities to high standards in the plans they develop and in the implementation of their plans. " (via Meta [FDC Framework])

The FDC consists of nine volunteer members and is supported by WMF grantmaking staff. Within less than two years, they established processes and rules and are responsible for distributing $6 million worth of funds per year. 15 out of 40 Chapters have applied for FDC funding in 2013-14.

The work of the FDC receives approval from some Chapters: "FDC is amazing. Before, it was only one person deciding where money goes. Now, it's a volunteer committee!", "They do a fantastic job". Still, all things concerning the topic of "money" seem to be stuck in the past. There are many perceptions and misperceptions about the distribution of money, fairness, independence and transparency. The main conflicts are:

Non-transparent process
How decisions about grants and funds – whether inside WMF or by the FDC – are taken, is not understandable for everyone. While WMF and FDC claim that transparency is unprecedented, the actual decision-making process is described as unpredictable and non-transparent, like a black box.

Chapters complain: "They're just saying that your proposal is bullshit. But instead, they should educate us. We need to understand what we can do better". They want to better understand what kind of information and communication the FDC actually needs from them. They want to receive advice for improvement in the course of the application and have the chance to make the necessary adjustments. At the moment they only have the chance to react after decisions have been taken.

The FDC has determined already that there is a major need for their decision-making process to be understandable. "We need to walk Chapters through our process so they can understand".

Too much bureaucracy
The requirements for receiving funds are perceived as very bureaucratic and too complicated by many Chapters. They complain that the FDC demands a ridiculous level of details in its reports.

According to the FDC, the complaints by applicants about high levels of bureaucracy do not actually correspond to reality however: at other foundations and grant-making institutions, applications demand far more time and resources and don't provide any guarantee of success. By comparison, the FDC process can even be considered as simple and unbureaucratic. Some of the Chapters who have previously been involved in other grant-making processes agree with the FDC's judgement here.

Nevertheless, the application and reporting requirements are causing frustration on an emotional level well as on an energy level. The way these new tasks appeared on Chapters' to-do lists caused thoughts like "We started in joy, now it's all about fulfilling WMF's needs".

Judging instead of learning
A major point of criticism has been the fact that Chapters don't actually know the rules and requirements that are the basis for FDC's recommendations. The only feedback Chapters receive are in form of % cuts, which has become the new "metric" when talking about annual grants: "They received 60%", "Last year, we were cut off 50% of our asked budget".

FDC is aware of the issue and states: "*We understand that they are upset. They put so much love into a project and then they don't get the full funding. Of course, they're angry. We need to change that*".

Process as learning tool
It has been realised that the FDC process needs to shift more towards a learning dialogue. Learning and money are closely connected in any organisation and if it is designed properly, the process can be a valuable tool for all parties involved.

WMF admits that the Foundation cannot be an allocation mechanism without being a supportive mechanism. It is very much in their own interests to have trained and professional grantees. The grant making team explains: *"Our role is to facilitate and support the work of Chapters with*

money and learnings. We are here to help grantees to make Chapter's application worthy. Through grants we support home-grown initiatives rather than doing it ourselves."

The FDC wishes its procedures to be considered a learning tool. For those who are willing to go down this route, filling out the applications and reports provides an indispensable tool for self-evaluation, improvement and development. FDC clearly states that "Our recommendations are supposed to help", but there has not yet been a communication process that would have fostered this helping and learning journey to its full potential.

Furthermore, there is the persistent rumor among many people that actually "no one ever reads those boring reports". While people from WMF and FDC vigorously stated that they *do* read those reports, this is still perceived differently.

Let's make better mistakes tomorrow
In addition, a learning process always includes not only successes and best practices, but also mistakes and failures. Movement affiliates are encouraged to report their failures openly and to share what they have learned from their mistakes in order to prevent others from repeating them. However, there is no safe ground for failing (and sharing failures) rooted in the movement. Driven by the fear that admitting mistakes will immediately lead to cutbacks in funding, everyone instead tries to look their very best. "I would never talk openly about my mistakes" - Why? - "You never know how it will come back to you!" "What if we look like losers? We will get even bigger cuts next year!". Keeping failures secret fuels the sense of non-transparency and the black box of funds dissemination.

Besides, when talking about sharing failures, several Chapters wonder when and how the WMF will talk openly about the things they failed with. "If they don't dare … why should we do it?".

Poor communication
Overall, communication has been an issue in the relationship of Chapters and the FDC: there is too little interaction; too many things happen behind closed doors and are communicated only afterwards instead of ideas being exchanged constantly.

FDC members emphasised that communication needs to be improved. "People are not informed about us. We need to be more interactive, to be the face of FDC. Otherwise, Chapters are only in contact with FDC staff and therefore think that it's them making the decisions about funds dissemination."

In many cases, it's the WMF who is perceived to have the decision power about annual grants "WMF decides if we will still exist next year". In fact, it's only a small part of WMF that deals with money, but it is deeply rooted in the minds of Chapters that the WMF is an organisation that mainly decides about financial "life or death". Even if the FDC is a community-driven process, and the WMF staff emphasise that they are "even not allowed in the FDC's meeting room", many Chapters perceive that the FDC only "does what WMF staff tells them".

This misperception causes even more irritation. FDC staff wonder: *"Why do Chapters attack the WMF for the funds dissemination, if it's the FDC and the Board of Trustees actually taking the decisions? Both consist of their peers! Are they attacking their own peers?"*. FDC isn't happy with this situation either. When hearing complaints and general attacks, it feels to them as if the volunteer work of the committee isn't as valued as it could be.

Lacking flexibility for the diversity of applicants
Applicants for annual grants differ in terms of age, experience, amount of money requested, type of programmatic work etc. For some small Chapters, the bureaucracy has become a huge burden in comparison to the amount of money they are requesting. At the moment there is no differentiation in procedures according to the different affiliates and some of them are now dealing with "too many reports for too few money". Some consider the Project and Event Grants being a more suitable option for those Chapters.

Another topic of criticism has been the 20% guardrails rule that allows a maximum of 20% annual growth in terms of the annual budget. Young Chapters claim that *"In the starting phase, you need some seed-funding to get going. The guardrails are a growth-break"*.

The FDC has confirmed that their framework doesn't yet address the diversity. "We should re-assess application and reporting requirements for younger chapters" and "I'd like to be our framework more flexible in terms of process, templates, interactions and feedback". On the other hand, the committee wishes for a more rigid self-assessment by affiliates: *"Every contribution from any affiliation to the movement is welcome - you can stay unique! But please be realistic about yourself"*.

Outlook on the FDC process
When looking at the FDC, it needs to be considered that the process is quite young and deals with very large amounts of money in an unique and innovative way. After the first two years, the FDC Advisory Group assessed the process and published recommendations for the enhancement of the FDC future in June 2014.

In August 2014, the WMF Executive Director will make a recommendation to the Board of Trustees, containing the possible outcomes of continuing as it is, adopting modifications, or eliminating it.

Please note that the interviews took place in 2013-14, before the AG recommendations were published and enhancements on learning and evaluation in the movement were initiated.

Role of the Wikimedia Foundation
One of the biggest questions in the interviews has been about leadership in the movement.

Although most interviewees tended to emphasise that the movement is non-hierarchical, the wish for a stronger leadership was voiced several times. By many, the WMF is seen as the head of the movement.

The Wikimedia Foundation Board of Trustees oversees the Foundation and its work. It supervises the organisation and has the authority to exercise all corporate powers. It is responsible for determining the WMF's mission, goals, long-term plans as well as high level policies of the WMF and its projects. The Board selects and evaluates the Executive Director, who oversees the WMF's day-to-day operations and is primarily responsible for carrying out the organization's strategic plans and policies. On top of that, Board members are representing the WMF and its mission towards the communities and the broader public.

At full membership, the Board includes ten trustees: Three members are elected by the communities, two members are selected by Wikimedia affiliates, four members are co-opted to fulfil the expertise needs in the Board, and one seat is designated for Jimmy Wales.

Some Chapters claimed that it is not clear what the Affiliate Selected Board Seats (formerly known as Chapter Selected Board Seats) mean for them. Even if they are allowed to select two people, there is no constant exchange ensuring their representation on the Board. However, Board members clarified that they are not representing the Chapters in the Board but that their decisions are all made for the benefit of the WMF in the first place.

On top of that, there was no common understanding among the interviewees of whether its Board of Trustees is a steering committee for the global movement or the overseeing authority for the Wikimedia Foundation itself. "*Are they heading a global movement that is striving for Free Knowledge or a Non-Profit company that is running a website?*"

After all, the role of the WMF in relation to its main tasks is pretty clear for everyone and was described as straightforward by the interviewees: the WMF is responsible for the key resources and infrastructure of the movement. It develops and maintains software and servers and handles the traffic of the fifth largest website on the planet. They make the projects accessible for users and readers.

Besides their Engineering and Product focus, it also handles funds processing and grant-making and stewardship of donors' money. It provides the legal framework for the projects and defends the mission and values of the movement. It is safe-keeping the most treasured asset: the Wikimedia brand and trademarks. All tasks receive appreciation from most interviewees and everyone can agree that WMF is doing a great job at those tasks.

The role of the WMF is not clear to movement affiliates
What appears to be less clear is the WMF's own position in the Wikimedia movement. People's statements range from leader, mom or boss through US chapter to equal partner, but one who has all the power. Some describe it as a leader who is not providing leadership.

Many Chapters see the WMF as leader. Subsequently, they expect a leadership role from it. In contrast, the WMF doesn't agree unconditionally, but expects Chapters to initiate their own initiatives."We consider Chapters as being our partners". Hence, Chapters are confused. The "Haifa trauma" in mind, they are on alert for similar actions in the future and therefore wonder: How should we start our own initiatives, realise our own ideas, or even be equal partners for the Foundation, if we're totally dependent from it? Is it really possible that we can be equal partners? The Foundation, in turn, is aware of the shock it caused by the Haifa letter and tries to show a more open and cooperative side, while shirking its responsibilities and its power at the same time.

Furthermore, there are issues where the Chapters feel unsure, or even unsafe, like funds applications or reports, and they expect and demand a teacher or leader role of the WMF. On the other side, they don't want to be patronised and even react surly to "anything coming from San Francisco". This doesn't make it easy for the Foundation at all. How to strike the right note? How to react properly? They are forty chapters with so different characters and sensibilities and it's impossible to do it right by all. The WMF says: *"It's a tough challenge for us to be a collaborative facilitator."*

Voices in the Foundation state that Chapters are responsible for themselves. Chapters respond that this is not possible. Particularly in terms of finances and trademarks, they are dependent on the WMF. Many don't even want to be independent or responsible for themselves, but just want to be "part of it". They ask and wish for more guidance, leadership and guidelines in order to be able fulfil all of WMF's requirements.

The WMF wants Chapters' to take a more proactive role. It says Chapters should find their own way and discover their strong points. And if they have trouble on the way towards finding those, they can ask the WMF for help.

The issue leadership seems to be like a hot potato passing from one to the other.

Growing pains
What makes things even more complicated is that the WMF has shifted its organisational structure several times. People perceive their path as a "zigzag course", and have a hard time understanding what the WMF wants and what "these shiny new titles" actually mean. But what people brought up in the interviews as well – after having poured their heart out about their worries and objections – was that the WMF is actually a very young organisation and still has a lot to learn and go through. Like all organisations in the movement, it is facing growing pains, and taking small steps towards becoming more successful.

One of these steps was the narrowing focus debate, after which the WMF concentrated on two main areas: Engineering and Grant-making. One question that was raised a few times was

whether an organisation that claims "We are a website" can fulfil their second duty of being a grantmaking body for a global movement in the best possible way.

Communication

The Wikimedia movement is a complex and diverse system, a challenge for the WMF and not considered safe ground by affiliates. People have been trying to do their best possible job, and good faith should always be assumed, but mistakes have been made.

Some of the mistakes evolved into assumptions, rumours and "Wiki myths". Some of them were reinforced by other mistakes. They were interpreted, discussed and sometimes broadened. New actions were then viewed in the light of past actions, which made the perceptions and myths grow: until some of them turned into taken-for-granted facts. The same topic can be seen from various perspectives and often, it's a projection of our own opinion onto someone else's behaviour that causes conflict, mistrust and anger.

What makes things even more complicated is that most Wikimedia communication takes place online and lacks the emotional aspects of personal communication: building trust, empathy and reading between the lines. A system that works perfectly for creating knowledge doesn't always work for personal relationships. A common quote in the interviews was "Some people that I found to be really annoying online turned out to be great when I met them in person". Online discussions become harsh easily and criticism is brought up very quickly. When having a face to face conversation, many of the accusations can be resolved before "manifesting themselves".

The international character of the movement poses another challenge: It is commonly acknowledged that English is the language spoken by most people and used for all international communication. But it does not take into account that there is a large number of people in the world who don't speak English or don't feel safe enough with their English skills to engage in complex discussions. And while there are almost 300 language versions of Wikipedia, movement-related texts and discussions are hardly translated into other languages.

Speaking of language, there is not only the issue of the English centered communication culture. Over the years, the Wikimedia communities have developed their own language and style of communication. The vocabulary has grown constantly, with excessive use of abbreviations and insider jokes helping to forming bonds among close peers. Newbies were given the feeling as if they were clueless outsiders, and not welcome.

Another issue that was mentioned frequently is the geographical and emotional distance between many organisations (WMF and Chapters as well as among different Chapters). Interviewees from Chapters said that they wouldn't dare to simply call the WMF and ask a question. What happens instead is "hiding behind screens", shifting the necessary conversation to emailing and postings on Meta. WMF and WMDE in particular are both seen as very professional players where one "doesn't just call and ask something". Personal communication

is restricted to meetings and conferences, but meeting once a year is often not enough to create a culture of trust and openness.

Challenges for Chapters

In the face of all the odds and uncertainties, there is a dream: Wikipedians and Wikimedians want to change society, to make the world a better place. In order to do that, people choose to get organised. There is a great tendency among active Wikimedia volunteers to form groups, to connect with like-minded people, to create a framework for the urge to accomplish more than "just editing".

Almost all of the Wikimedia Affiliates are set up by volunteers, most of them long-standing Wikipedians. But being a great Wikipedian does not necessarily mean being a great manager and knowing how to set up and lead an organisation. And there are a lot of things to cope with when starting a formal organisation: they need to find out why they want to be a Chapter, what they want to achieve and how they plan to achieve it. They have to get their value proposition and stakeholder network right. To sum up: they need a strategy and to figure out how to best make use of the precursory value of being local. They need to deal with planning, project management, accountability, governance, communications, evaluation and many more aspects. In fact, they are no longer building an encyclopaedia, they are creating a start-up.

Many Wikimedians embark on this journey. They try to comply with all the rules and requirements, in the Wikimedia ecosystem as well as in their home country. The administrative tasks plus the actual programmatic work quickly add up and become an overburden. Many of them still try to continue, to work even harder in order to succeed. Some said in the interviews that they were actually completely out of energy, but still felt "morally obliged" to continue their work for the Chapter. Many Wikimedians continue working hard until they cross the border into ill-health. The results are frustration, anger and, in the worst case, even burn-out.

If volunteers can't cope with these things or don't have the necessary skills and time for them, they require some sort of professional support.

In order to get professional support – in whatever form – funds are needed. But in order to apply for funds, a certain level of professionalism is required to cope with the necessary forms and procedures. For some Chapters, this becomes a chicken-and-egg problem.

As described previously, setting up a Chapter comes with a large variety of obligations and challenges that need to be considered. The following is not a complete list but shows the most common items that were mentioned in the interviews. Depending on the people involved and the local environment, they can differ from organisation to organisation.

Strategy

Chapter founders and WMF agreed that these questions need to be determined when starting a Chapter:

- Why do we want to create a Chapter? What is the motivation driving us?
- What do we want to achieve? What does the Wikimedia mission mean for us?
- What goals and activities are useful and meaningful in our local context? What activities are the Chapter founders interested (and skilled) in? What activities do we want to focus on? How do we make use of the precursory value of being local?
- What resources are available in terms of manpower, time and skills?

The deeper they dive into the whole topic, the greater the number of questions that need to be addressed:

- What problem do we want to solve?
- Which target group(s) (e.g. specific community, school teachers, museum directors) are we serving?
- What value are we creating for them? What value are we creating for the "general public"?
- How do we create this value? What activities are suitable in order to create this value?
- Who are our stakeholders?
- How do our activities influence the Wikimedia movement?

To sum up, they need to find out why they want to be a Chapter, what they want to achieve and how they plan to achieve it. They need a strategy. This is not trivial and as any start-up they have difficulties answering all these questions. Wikimedia Chapters face a challenging situation as they don't know what they are expected to do, what they can do and what they should do. There is no secure basis as they proceed along the way.

The interviews allowed us to distil and cluster a wide range of topics for the Chapters' work. Again, these lists are not intended to be exhaustive but rather illustrating the variety and divergence of movement organisations.

Possible Chapter activities, relating to their stakeholders

WMF	Movement committees	Local editing community	Offline-world institutions	Local reading community
Explain and advise about local communities	Create learning patterns	Support community, e.g. with grants, equipment, programs	Content liberation	Disseminate free content
Give local volunteers voice and credibility	Advise other affiliates	Foster relationship between Chapter and community	Explain Wikimedia and its projects, propagate its values	Gain new editors, new volunteers, new members
Support WMF projects on a local level	Providing input in discussions	Explain values, goals and activities of WMF	Political advocacy	Provide opportunities to create content
Collaborative Software Development		Collaborative Software Development	Media and press contact	Explain Wikimedia and its projects, propagate its values
		Gain new members, gain new volunteers		

Special issue: Target group "Community"

Most Chapters stated that they are adding value to the community. But when it comes to the following questions, answers are still rare or very divergent.

- Do we actually know what the community wants and care about? How can we find out about it?
- Does our community need representation? Do they want representation?
- What do they need from us? What do they need from other stakeholders?
- Do we want to pull people from the online world into offline activities?
- Or do we want to help them to have a better editing experience?
- What kind of volunteers do we need in the Chapter?
- Do we want to "recruit" these volunteers from the editing community? Or elsewhere?
- What can we offer so they have an incentive or reason to volunteer?
- How can we enable and empower volunteers? What do we need to provide for them?
- What do *we* want to do for them (rather than: What should they do for our organisation?)

These are questions that each movement organisation (even the WMF!) needs to deal with. For Chapters it is quite tricky because many editors are not even aware of their offers.

Building an organisation

There are established processes and documents available to help people build their organisation. The Affiliations Committee supports them on their way to becoming recognised by the WMF. Some Chapters have followed the [Chapter Creation Guide](#) provided by the AffCom which lists duties such as accountability, governance and project management. On top of these regular tasks, the interviewees mentioned the following challenges:

- Group dynamics among Chapter volunteers and resultant personal conflicts.
- Finding consensus and agreement in relation to strategic questions might involve conflict and be very draining in terms of energy and motivation.
- Splitting tasks and responsibilities so that these burdens are not borne by only a few people.
- Clashes with the offline world, which has different habits, rules, settings.

Roles

When setting up and leading a chapter, the founders and/or the board consider to have people with different roles and skills in their team to be a key of success. We clustered the different descriptions in their narratives and defined the following roles of success:

- "The Showmaster": for outreach, press, acquisition of partners, funds etc.
- "The Not-Afraid-of-Law-Paragraphs-One": bylaws and all things legal
- "The Juggling Queen/King": master of organising things and multitasking – perfect for events, workshops, holds things together
- "The Documentation Freak": all things archive, track record, filing system etc.
- "The Numbers Cruncher": accounting, financial planning, budgets, reports, metrics
- "The Teacher": patiently explaining Wikipedia, teaching, sharing his knowledge

Revenue structure

At some point along the Chapters' development path, money becomes an issue, at the latest when volunteers are fed up with paying for activities, travel costs or materials out of their own pockets. At that point it was stated to be essential for the Chapter to determine:

- Movement-related funding**:** Start-Up support by AffCom, Grants via the Wikimedia programmes: Annual Plan Grants (APG; FDC advises WMF Board), Project and Event Grants (PEG; GAC advises WMF staff), Individual Engagement Grants (IEG, IEG committee advises WMF staff), Participation and Travel Support (PTS; WMF, WMDE, WMCH staff decide). An overview of all WMF grants is available on the [grants portal](#) on Meta.
- Direct donations: Collected by the Chapters themselves, either via the annual fundraiser (WMDE and WMCH) or via their own websites, during events etc.
- Membership fees: Chapter members pay a certain annual fee.
- Funding via external grants: Sponsoring through foundations, corporations or other associations.

A note on external money:
External funding is considered to be an opportunity to win additional sources of income and to reach a higher level of professionalism. It could provide the desired stability and bring in additional control mechanisms. Chapters strive for independence and the WMF encourages them to diversify their sources of revenue.

What was brought to the table were the risks that go hand in hand with exposing a young organisation with a strong brand to outside players that the movement has hardly any control over. These players might want to influence the work of a Chapter, jeopardise its integrity and even do harm to the Wikimedia values if there are no established mechanisms to prevent it. Could an approach that should, at first sight, lower the risk, actually do more harm than good to the movement as a whole?

Staff

The Wikimedia Foundation and Wikimedia Deutschland have both been an orientation point when it has come to the question of hiring staff. Both organisations have a considerable number of staff (WMF 180, WMDE 70) – and they are both perceived as professional and successful. Now younger organisations are aiming for the same. And in order to get along with the existing system it is thought to be essential to have staff. At the moment more than twelve Chapters employ at least one employee, ranging from one (e.g. Wikimedia Hungary) to seventeen (Wikimedia UK). Furthermore, at every Wikimedia Conference, training sessions about "The first employee" are remarkably popular.

There are different categories of reasons for hing staff:
- Too many projects, need of support
- Not enough volunteers, need of support
- Lack of experience in certain areas
- Staff is a status symbol in the movement

Challenges of being an employer

But hiring and employing someone isn't a trivial thing. The role of the founding team (board) changes dramatically. To hire and to employ someone requires experience. The amount of work may increase, because the board needs to communicate, to delegate, to explain. In fact, hiring and training can be more work than the paperwork the board wants to get rid off.

With staff comes responsibility. Chapter founders are not "only" volunteers and board members anymore, but they are employers and managers (besides being editors, photographers, committee members *and* having a job, university, family on top). They need to provide leadership, purpose and advice. From having an executive role and running all activities and administration, they are supposed to move towards more of a governance, strategy-driven role, supervising the staff without interfering in their daily business. This is a huge challenge and no small wonder that so many active board members struggle with over-working and burn-out.

Questions therefore need to be addressed: Are we ready for this? Do we really need staff? Why do we need staff? What do we expect from staff? Are we ready to take the responsibility?

Sometimes the situation requires even more sensitivity: when a board member becomes a staff member. For them, almost their entire life becomes centred around Wikimedia and Wikimedia: friends, boss, colleagues, projects. On top of that, conflict of interest issues need to be handled especially carefully and a "club of friends" might not always be the best and controllable basis for professional cooperation.

Type of staff

Not all Chapters start with hiring an Executive Director. To get the best-possible professional support, they need to work out what type of staff best meet their initial demands:

- Office manager
- Executive Director
- Project manager
- Community support
- Consultant for financial issues or projects

It depends on the individual needs and goals of a Chapter and should be planned carefully.

One question which is quite common among Wikimedians is: "How many edits do you have?" It results in reflection upon whether external people are a good fit for Wikimedia organisations. But

what if having experience in running a non-governmental organisation is more important for a specific challenge than being a long-standing editor? On the other hand, as a WMF staff member describes it: "Editing equals getting credit. My Wikipedia instinct helps me in my job. I know exactly what's accepted and what not."

The criticism is made that many Chapter boards are "too closed", only approving members who are active editors. Some people claim that it would be a healthy balance to include external people with beneficial qualifications on the board. On the other hand, it requires good alignment of strategic goals and values to create a strong and smoothly working board.

How to attract the right talent? This is an issue for every organisation in the world and so it is for Chapters. In order to attract skilled people who fit with Wikimedia values, they need to know how to become self-aware, how to create an image of themselves and how to communicate it properly towards others.

What are the staff supposed to do?
Closely connected with the question about the role of employees is the question of the tasks they are going to be assigned. This is particularly tricky, as most of the work has previously been done by volunteers.

Some board members consider staff as a chance to "give away boring tasks and to free up precious volunteer time". After all, volunteer time is the scarce resource of the movement and the biggest worry is the lack of volunteers. "For the cool stuff, volunteers will jump in and help. For the boring stuff, no one wants to do it." On the other hand, employees need to have a purpose for their job and interesting tasks. Several questions arise:

- Is there a risk that staff will take away the "cool stuff" from volunteers?
- Which tasks can be better done by volunteers?
- Which tasks need a professional approach and are better handled by staff?
- What is the right approach: staff producing ideas and volunteers implementing them or volunteers producing ideas and staff implementing them/providing support?

If there are not enough volunteers and not enough activities, it can be helpful to hire a motivated person who creates some momentum and runs events or programmes that attract new volunteers. On the other hand, it is considered more valuable if volunteers create their own activities and programmes and staff are only used for administrative tasks.

Several Chapters also reported that they were confronted with the question: Volunteers are proud of having achieved so much with only volunteer-power, so why do you need paid staff now? Staff members even reported suspicion towards them when they first arrived in the Chapter.

Conflicts between board and staff

Many board members struggle with expectations management towards their (first) employee(s). They need to clearly **split tasks and responsibilities**:

- *"We want our employee to do all the administrative work."*
- *"Staff is for support. For tasks that no one else wants to do."*
- *"When you pay someone, you can tell them what to do and they have to do it."*
- *"You can't demand things from a volunteer, but you can and have to demand things from staff."*

versus:

- *"My board thought I'm an office manager. But I was hired as an Executive Director."*
- *"I don't feel supported by my board."*

The transition is hard for many board members: Wikipedians of the project's early days stated that it's not easy for them to let go of their beloved tasks:

- *"We are involved in projects as we know what works and what not."*
- *"We are driving the projects, after all this has been created by us."*

versus:

- *"My board lacks strategic thinking."*
- *"My board still wants to participate in the day-to-day business. But they are supposed to rather think about strategy and leaving the operational tasks to me."*
- *"I spend too much time developing my board."*
- *"Some board members can't separate their personal from their professional views - it's unprofessional."*

It's a long process for boards to find their new role, to find a balance between control and trust and to establish a good information flow:

- *"I want to know exactly what's going on."*
- *"My staff isn't reporting quick enough."*

versus:

- *"I need some space and freedom for the operative tasks."*
- *"I don't have the capacity to report every single detail."*
- *"I have seven bosses."*

To sum this up, many people are quite frustrated with the internal controversies and power games and seem to be stuck in the established environments. When speaking to those interview partners who are also familiar with other movements or organisations, they all pointed out that these debates are not new or unique and that in the NGO world, the relations between paid staff and volunteers are always one of the most tricky issues.

Young professionals

But there again, there are always two sides to the same coin: young organisations depend heavily on personalities, their characters and thematic preferences. But personal passion and the board's interest might interfere with the essential first step of creating a comprehensive strategy. Accommodating individual characters into processes and the organisation is tricky. How can Chapters balance the motivation to do cool stuff while ensuring that the organisation is built up in a proper way, step by step?

When starting a Chapter, people are pulled into different activities and administrative tasks which leave them with no time "to stop the machine and think about strategy". One way to reduce this risk is to follow the paths of the older organisations. But newcomers might want to try out new things and find their own ways. Should they go through all those challenges and be bold, or should they learn from other organisations' mistakes and benefit from their experience?

It's a delicate path: an organisation needs to go from being an independent, spontaneously formed and motivated group of people who want to follow their passion to being a solid organisation with a clear purpose, operating in a professional environment and thriving with programs and projects. How can a Chapter remain volunteer driven but become professional?

How did organisational structures evolve?

The setting-up and development of a Wikimedia Chapter is a complex and challenging task, demanding a high amount of energy and commitment by all founders involved.

As described previously, Chapter founders face high levels of insecurity due to the fact that there is no commonly agreed definition of the "right" goals, activities and metrics. What makes things even more complicated is the fact that there is no agreement about the structure of the movement itself. Herein lies another historical source of problems.

The question as to what structures are needed in order to define and reach the Wikimedia goals has never been fully answered. Which organisational model would serve the Wikimedia mission the best way? And what could each individual could contribute to it? These topics have never been clearly defined and there was no planned approach. Instead, things happened the wiki-way: structures grew organically and older entities were copied by the younger ones.

German volunteers created the first Chapter in 2004. After a long journey, Wikimedia Deutschland is today by far the biggest Chapter. For the founders, setting up a local organisation within national borders was just a natural step; they were not following any official recommendation or analysis, they just felt that this structure was the best way to continue for them.

Shortly after the German Chapter was founded, volunteers from other countries followed this example and also started creating national Chapters in order to get organised.

Being professional equals being successful?
Today, the Wikimedia Foundation and Wikimedia Deutschland are considered as professional and successful organisations because they have offices and a considerable number of staff. These assets (office, staff, Executive Director) are widely considered to be the key criteria for success. Understandably, other Chapters aim for success as well, and therefore try to reach the same "asset level" as quickly as possible in order to be on the same professional level as the two "big sisters" WMF and WMDE. There is a widely spread perception that without being professional, there is no way to be taken seriously by the WMF.

What is often overlooked is that those "key assets" are only the tip of the iceberg. The hard work and the long time without money, staff or an office is invisible and often forgotten. For instance, WMDE didn't have any funds for a very long time and only started hiring more people five years after its creation.

Steering into professionalism
On the other hand, the WMF fuelled this perception by steering young organisations into professionalism. They approved [grants for professionalisation](#) for various Chapters in 2011, hoping to direct Chapters away from being all-volunteer towards becoming professional, well governed entities.

In addition, the level of bureaucracy and complexity of movement processes is increasing (in parallel with the amount of donations that Wikimedia is collecting as a whole). Young organisations are "seeing what's coming" and want to be prepared. Again, a common "easy fix" solution is to set up a professional organisation as quickly as possible, sometimes skipping the important step of addressing basic strategic questions (see 11.a).

Moreover, people assumed that there was no other alternative for volunteers who wanted to form an organisation. In order to cope with the existing system, one needed to be a Chapter to be part of the Wikiverse. As a consequence, a national Chapter has been the choice of organisational form when starting to expand volunteer activities from editing Wikipedia into the offline world. The question became "How do I create the same structures as others already have?" instead of "What structure do I need, if any?". There was neither opposition by the WMF, nor collaborative thinking about what forms of organisations are needed and relevant for the Wikimedia movement.

Support in Chapter development

The questions around leadership within the whole movement can be applied to the issue of responsibilities around Chapter development: Who should help Chapters on their path towards becoming solid organisations? Who should take the lead?

Many people claim that the WMF is responsible for Chapter development: "They took the power, now they need to show responsibility." The WMF is seen to be in the best position to help because they have the knowledge, skills and resources to develop Chapters. Being the only organisation in the movement with a truly global scope, the WMF is automatically considered responsible. On top of that, people add that it should be in the WMF's own interest to develop solid organisations, with good governance and striving for impact.

Another line of argument claims the opposite: Chapters are in the best position to support each other and they should take responsibility themselves. There are experienced Chapters with resources who can help the newer ones. In the narrowing focus, the WMF clearly stated that it is not resourced to support organisational development or to support chapters in crisis.They claim to not see the Chapters as their "children" but as their partners.

"Chapters provide us with an opportunity to invest and we should embrace these chances of investment. We want Chapters to succeed in forwarding the movement – they are a powerful tool for us to achieve impact. We want their attempts to be successful."

In addition, WMF prefers to be a facilitator of knowledge exchange, rather that saying *"This is how you should do it".* Instead of imposing rules and processes, WMF states that they can be invited to give input where it's needed by Chapters. This can only work with a more proactive role of Chapters, who need take the responsibility for their own development and then draw upon the WMF's resources and knowledge.

These contradictory positions point towards a leadership gap: Who should take responsibility for shaping and supporting movement structures? This leads to the awkward situation that both the WMF and the affiliations adopt a "wait and see" attitude: The WMF is waiting for Chapters to proactively approach it with concrete proposals or requests for support, while the Chapters are waiting for the WMF to provide facilitation and leadership.

This attitude is even more encouraged by the dilemma of distance in the relationship between Chapters and WMF. Among some Chapters, it is perceived that it is only possible to ask for help when a certain status is achieved, which is also due to the insecurity that was described previously. "We need to advance, then we will receive help", „I can't just call the WMF and ask stupid questions. It has all to go through official channels and therefore we need to work hard on building our organisation first". This is again a chicken-and-egg problem.

Different approaches have been put in place to try to fill this gap: the [Affiliations Committee (AffCom)](#) was created in 2006 (formerly known as Chapters Committee) and today it *"is a Wikimedia community committee entrusted with advising the Wikimedia Foundation Board of Trustees on the approval of new [movement affiliates](#): national and subnational chapters, thematic organisations, and user groups."* The AffCom supports groups of Wikimedia enthusiasts who want to become officially recognised by the WMF Board to become a Wikimedia affiliate. They guide organisations through the founding process by helping them to prepare bylaws, answering questions about what the Foundation expects from an affiliate, providing help and advice on solving common technical, trademark, administrative and community-building issues.

The AffCom is held in high esteem among most Chapters, and WMF members have also complimented on their accomplishments. We only have heard a few critics about the length and fascination with details of the process. One remarkable quote that we heard in the interviews a few times in different force was that the AffCom does not have "teeth to bite the black sheep". They support people before they become an affiliate, but do not have the means to steer them forward, or to set bounds if they develop in a harmful way. Some voices even claim that some of the existing Chapters would not be approved as Chapters today. There was no training for newly created organisations and no structured support for those who were struggling with their first steps. In fact, AffCom's field of responsibility ends where support is now considered to be of utmost importance.

Another approach to "*clarify the roles and responsibilities of different groups working to support the international Wikimedia movement [...] developing recommendations to improve Wikimedia as a global network of organizations*" was initiated in 2010 by different movement members: The [movement roles project](#). It led to the introduction of two new affiliate models ([User Groups and Thematic Organisations](#)) in 2012 and the renaming of the former Chapters Committee to Affiliations Committee. Alongside the introduction of these two new organisational forms, the movement roles project recommended installing a "*Chapters Council to reach consensus and resolve disputes among Chapters*". In 2012, the [Wikimedia Chapters Association (WCA)](#) was created but disappeared from the scene in 2013. In 2013/14, the movement has seen some more focused attempts, such as board training workshops, meetings of the Chapters' Executive Directors and the [AffCom's liaison model](#) to support younger organisations.

However, these initiatives have not directly addressed the remaining questions about the structure of the Wikimedia movement, but rather have cemented the existing model.

Questioning the organisational model of Wikimedia

As mentioned before, the movement tends to apply a lot of effort towards patching apparent symptoms rather than addressing the underlying causes. This is particularly valid for the

question about the organisational model of the Wikimedia movement. Questions that are hardly ever brought up in public but which surfaced during the interviews include:

Are local bricks-and-mortar organisations needed at all?
Those in favour claim: yes, because...
- we can only deal with external partners (GLAMs, media, legislative, political, educational, etc.) on an official level.
- we need reliable structures to empower volunteers.
- we need to keep (legal, financial) risks away from individuals.
- we need solid structures that are able to understand local and to act global.
- we want to put more vigour on our opinions, and want our statements to be seen as coming from organisations and not from individuals.
- we need good governance and control over those who use the trademarks.

Those against claim: no, because...
- structures and endless fights about bylaws, power and responsibilities drain volunteer enthusiasm.
- communication and community work don't need a legal entity.
- fixed structures impede people from staying flexible and passionate.
- building bricks-and-mortar organisations is a waste of time and money.
- there is no evidence of their impact being bigger than that of volunteer groups.
- Chapters can get drown in their self-perpetuation and structure itself becomes the reason to exist.
- we shouldn't lump people into organisations. It's about individuals!

This is a major controversy, and pro and contra arguments have been voiced by Chapters' stakeholders as well as by Chapter representatives themselves. Taking a step back and questioning the model that is taken for granted might help to come up with clear arguments for both sides: What would be if Chapters wouldn't exist? How would that impact Wikipedia and how would that impact society? And how could alternatives look like?

Should organisations operate within national borders?
As mentioned previously, being local provides organisations with several benefits. Cultural institutions or educational partners would rather team up with a local organisation, cultural sensitivity is necessary to operate smoothly and successfully in a country and media and donors might prefer local points of contact. Chapters also mentioned in the interviews that local community members who are closely connected to them prefer being supported by "their own Chapter" rather than by one from another country.

The national concept of Chapters leads back to the creation of the first movement entity after the Wikimedia Foundation: Wikimedia Deutschland. The founders went for the national model in 2004 because at that time it just seemed the appropriate road for them to take. 39 organisations followed this lead and became a national organisation, too.

Looking back, some people now question whether this can be seen as a historical mistake. The Wikimedia projects are tied to languages; the internet as we know it today does not stop at national borders, nor does free knowledge.

Community members identify with their language projects, but language does not always equals country: If a language is spoken in more than one country, "one community" is spread all over the world. And on the other hand, there are countries with several different official languages. A national organisation then needs to "split" somehow in order to serve the different language communities.

What makes things even more complicated is that while all Wikimedia sites are operated under US law, national organisations are bound by their local laws. This exposes organisations to different risks, including censorship and political influence. Not only must the Chapter comply with these laws and know the threads, the WMF must also keep an overview of all the different jurisdictions.

This leads to the question whether organisations should be tied to countries, to languages or to topics. One attempt to solve the dilemma was [the creation of User Groups and Thematic Organisations](#).

But again, it needs to be taken into account that they are still organisations and even if they are informal or have no bylaws, they need to invest efforts in strategic planning and all other issues that come with being an organisation. Will they end up with the same chicken-and-egg problem?

Wikipedia has a massive "new world" influence on the "old world" (e.g. Wikipedia superseded Britannica and Brockhaus; knowledge is being democratised) – but Wikimedia is still bound by the old world's rules (formality, incorporation, business cards, titles, nations, etc.). How can Wikimedia create a framework that fits both – our new world and the old world? Does the framework need to fit with the old world at all? Can other movements and organisations be an inspiration?

Which framework does Wikimedia need in order to organise strongly and effectively, in a professional way which it can strongly and effectively work towards its mission in a professional way, and true to its grassroots and diversity?

Perceptions

Chapters were the main object of this project. We [asked their stakeholders](#) not only about Chapters' strengths and the benefits of working with them, but also about their weaknesses and the challenges that come with the cooperation. In turn, we asked the Chapters not only about their self-perception, but also about the strengths and weaknesses that surface in the [relationship with the WMF](#).

People naturally tend to generalise, so be aware that some of the quotes sound extreme, and they do not represent the opinion of the majority. But they are helpful in pointing to the trouble spots. Also, the good things are mostly taken for granted, while the tiniest criticism is given full vent. This is why the following list contains many more negative statements than positive ones. Let's have a look on the most persistent things that have emerged over the years and are influencing the mood within the movement.

Strengths and benefits

Chapters…
- are essential movement partners.
- have the precursory value of being local.
- initiate and run an enormous spectrum of activities.
- are run by amazing and inspiring people – they truly live the Wiki-spirit to the maximum.
- passionately dedicate their time to the movement.
- provide us an opportunity to invest – we want them to succeed.

The WMF…
- is there to protect our organisations.
- is a great consultant for us.
- has an open ear for our problems. We can always talk and in the end, both sides can learn from it.
- supports self-evaluation, this helps us to question and improve ourselves.
- protects the values of the movement, even in court.
- has set up the FDC and therefore initiated the greatest community involvement ever.
- provides us a with valuable learning opportunity by giving feedback on our reports.
- is an incubator for our ideas. They help us to make things happen.

Weaknesses and challenges
Following the existing paths / No clarity in leadership

Chapters…
- lack a visible purpose and are dealing with "the system" as an end itself.
- are unreflectively following the existing paths. They don't dare to think big or to improvise.
- grow too fast on paper but not in actual substance.
- think it's natural to receive money, just because others did before.
- hand in boring proposals and are surprised that they don't get full funding.
- take their role as community representatives towards the WMF for granted, but don't fulfil this purpose.

The WMF…

- claimed the power, but doesn't provide leadership.
- does not provide a secure basis, but keeps changing the rules every year.
- doesn't really know how to handle Chapters.
- fears that Chapters are growing too fast and too big.
- failed to provide an alternative to the existing paths.
- claims to be connected to "the community", but means only the English Wikipedia community by that.

Poor organisation / No teaching but patronising

Some Chapters...
- have gaps in their bylaws, or no proper bylaws.
- have no proper financial control.
- would not be approved as Chapters today.

The WMF…
- has the luxury of a staff of 180 – and demands the same professionalism from us.
- makes us feel like we are babies, instead of providing training, advice and feedback.
- made mistakes in its "early days", but expects us to be perfect from the start.

Poor communication
Chapters...
- demand full sympathy for their unique context but are upset when we ask tough questions.
- don't want to be transparent nor question themselves.
- don't speak with one voice.
- don't make use of their rights.
- hide instead of approaching us with their problems.
- don't tell their stories correctly.

The WMF…
- does not listen to us. We're too small and informal to approach them.
- uses "we are responsible" as an excuse for everything.
- does not have a clear position and doesn't act according to what they say.
- is like a black box, we haven't a clue what happens internally.
- communicates its decisions poorly and does not want to hear our opinion in an early stage.
- does not speak with one voice.

Maximum freedom with minimum control / Too much control
Chapters…
- want leadership, but perceive all our actions as patronising.

- don't want to talk about failures but just to receive money.
- want to be treated as a valuable partner without proving their impact.
- just complain instead of creating their own measurements.
- have no direction but are surprised when being criticised.

The WMF…
- pretends to be laissez-faire, but then reacts über-authoritarian in relation to single incidents.
- wants us to share our mistakes, but is not open about its own failures.
- is like our parent in-law: always waiting in fearful anticipation that we will do something wrong so that they can use it against us.
- only shows us our limits reactively.
- suspects us of not spending the movement money wisely.

Self-centredness / No empathy
Chapters…
- revolve around themselves.
- think that they are the centre of the movement.
- have no empathy for the WMF and other entities.
- tend to forget that the WMF needs to think global, not only local.
- are sometimes arrogant.

The WMF...
- uses one size fits all solutions for 40 individual entities and cultures.
- imposes their own rules on us.
- behaves like an American corporation, not like a partner in an international movement.
- is too far away to understand us. They haven't a clue what's going on.
- thinks that they are the centre of the movement.
- has a very American way of understanding success.
- created a level of bureaucracy that is killing our uniqueness.
- is sometimes arrogant.

Trust & Appreciation
Chapters...
- are locked in the old narrative about the WMF.
- stick to the "us versus them".
- don't acknowledge that things in the WMF have changed.
- think that there is evil intent behind each of our steps.
- don't appreciate our work, they take everything for granted.

The WMF...

- doesn't trust us, they want control over every single step.
- thinks they already know what's best for us. They never ask us for our opinion.
- does not support or empower us.
- wants us to be little Wikipedia fanclubs.
- acts on our "territory" without notifying us.
- takes our effort and sells it as their success. No attribution.
- doesn't think Chapters can represent Wikimedia.

Empathy

The last chapter showed the different perceptions that have evolved over years and are still persistent in the movement. Seeing everything from one's own perspective and not taking other people's views into account often leads to opinions and facts that seem to be carved in stone.

It is even more problematic when older organisations pass on old narratives to younger ones who don't get the chance to build their own opinion and to bring in a fresh perspective. Do all organisations really need to go through the same loop?

This is exactly what many of the interviewees wish for: overcoming the old narrative. "I don't want to walk on the paths of those old trauma. I want to make it different". All people in the movement wish for mutual recognition and approval. They wish for relationships that are based on trust, empathy and appreciation.

History can't be wiped out – but mistakes can be forgiven and let go of. Forgiving hasn't been a strength in the Wikimedia community, though. While code and technology can always be considered (and tackled) in a rational way, human relationships need more than that.

It's time to overcome those Wiki-myths that aren't helpful, either for any of the movement organisations or for the movement as a whole. An admission from the WMF that "yes, we played with Chapters. We need consistency now" could serve as an invitation to start this overcoming process.

Empathy for every entity in the Wikiverse is the essential prerequisite for this change. Gaining empathy can support all organisations in gaining a systemic understanding of each other and this, in turn, sets the stage for replacing the old perceptions with new ones. As long as it's "Us vs. Them", no relationship will grow.

It's a tough challenge to see the whole picture and the individual context at the same time – it requires "zooming in and out". WMF needs to zoom in to the individual Chapter levels, Chapters need to zoom out from their own perspective towards a global view. Both can benefit from the question: What exactly does it feel like to be the other party? How does it feel to be a Chapter

and how does it feel to be the WMF? It is not only about zooming in or out to another level, it is also about really "walking in the other person's shoes".

Deep understanding will help to master conflicts and disagreements in a more calm and reflective way. Besides, many conflicts can be avoided by simply asking "How will others feel if I do this?", "What do they need to know from me in order to understand my behaviour and my decisions?" and "How will my behaviour impact others?".

All conflicts that were described in this report are based on causes that are deep rooted and that haven't been tackled so far. They won't be resolved with simple Bepuschelungs-Aktivitäten.

Conclusion: Tough Questions

All the conflicts that are described in this report are based on causes that are deep rooted and that haven't been tackled so far. None of these conflicts can be viewed in isolation, and no simple solution can be developed without a profound understanding and frank conversations about the causes in the first place.

To enable the movement to thoroughly address these issues, it must take a step back and reconsider. Anything else would again only be a patching over of symptoms, and the movement would find itself confronted with the same problems over and over again.

The Chapters Dialogue therefore considers that it would be highly irresponsible to suggest solutions to any of the described issues. Instead, we have distilled tough questions from the insights that need to be addressed urgently and answered in an open and comprehensive manner:

1. What do we as a movement want to achieve? Do we run a website or foster Free Knowledge? Why are we doing the things we do, and what for?
2. How do we define impact when exploring new territory? And how do we measure success?
3. What is the role of the Wikimedia Foundation?
4. How do we want to communicate with each other? How can we build the necessary empathy and learn from each other? How can we overcome the old narrative and perceptions?
5. Where does the money come from and where should it go? Should money be the limiting factor when striving for Free Knowledge?
6. What movement framework is best suited to fulfil the Wikimedia mission?

The current way things are at present inhibits the movement from falstriving effectively for Free Knowledge. Instead of using its full potential to further its mission, it revolves around itself. The common mission is at serious risk if the movement won't tackle the causes of its problems.

Complaining is easy, finding solutions is hard. The tough questions can only be approached in a structured and professional way, with dedication and commitment. There is no point in tinkering with the symptoms and finding single-problem solutions.

The interviews carried out as part of the Chapters Dialogue were a safe way to bring the critical conversations and rumours to the surface. The insights now clearly point to the elephant in the room. They provide a comprehensive overview; one that we never had before. The Chapters Dialogue does not present simple solutions, but does put forward a recommendation. These insights need to be built upon and a sequel needs to be initiated.

Design of a framework

We need to reflect on what has made the movement successful so far. What do we take with us, and what do we leave behind? Imagine a movement that is built on trust, that stands united, and that is capable of leading an open dialogue. A movement with clarity about its impact and roles as well as stability to strive for changing the world. A Wikimedia that balances independence and committed obligations.

A change of perspectives is essential to overcome the perceptions and old narratives that are still etched in the Wikimedia memory. Only a deep and profound understanding can provide the basis for change.

As a result of the Chapters Dialogue, we recommend initiating a project that builds on these insights and takes the experience of other movements and organisations into account. The next step must be the design of a framework for the Wikimedia movement within which it can work strongly and effectively towards its mission in a professional way, yet stay true to its grassroots and maintain its diversity.

The sequel aims at closely coordinating with the WMF Board of Trustees and Executive Director, and at adopting a participatory and culturally appropriate approach. It leads to the design of a set of specific recommendations for action. By sticking to an iterative development and an agile implementation process, this approach will ensure the involvement and ownership of the key movement players. Working with pilot projects prevents the movement from stagnating and can show first results in less than a year. We consider this next step essential for the movement to unfold its full potential in the future.