WIKIMEDIA 2030

MOVEMENT STRATEGY

RECOMMENDATIONS
FOR BUILDING OUR SHARED FUTURE

Gratitude

This recommendations document has been written by our Movement for our Movement, and that makes it unique. It represents the culmination of almost two years' work gathering and synthesizing input from all across the Movement about how to change the way we do things so that we can move forward in our Strategic Direction.

This 'gratitude' text has been prepared by the Movement Strategy core team. The narrative of the recommendations, the 10 recommendations and the underlying principles as well as the glossary were prepared by a team of Wikimedians - volunteers, community members, and staff and board members of affiliates and the Wikimedia Foundation. Together, these elements make up the Wikimedia 2030 Movement Strategy. It would not exist without the many individuals from all corners of the world who joined this journey and contributed their skills and expertise to envision the future of our Movement. The diverse perspectives and collaborative spirit each person brought with them helped to surface innovative ideas and future-oriented solutions.

The ideas and work generated by all members of the nine thematic area working groups was instrumental throughout this process. These community leaders ensured rich discussions were held about the future of our Movement and created the initial set of draft recommendations upon which this current and final work is built. Deepest gratitude to the writers, integrators, and reviewers who consolidated thematic area recommendations, volunteered to review and integrate Movement feedback and, subsequently, refined and finalized the recommendations and underlying principles.

Heartfelt appreciation is extended to local organizers, supporting staff, affiliate liaisons, and community strategy liaisons who made this process a true global conversation. Gratitude is also extended to Wikimedia Foundation leadership and the Board of Trustees, who have supported and participated in this process since its inception and have remained invaluable partners. Finally, this process remains indebted to countless individuals from across our Movement who contributed in on- and offline conversations and helped shape the content of this product and the thinking around it.

Please refer to the list of contributors and process participants.

Movement Strategy 2030
Final Recommendations

Introduction

In 2017, we created a strategic direction for the future of our Movement and set ourselves an ambitious goal: *By 2030, Wikimedia will become the essential infrastructure of the ecosystem of free knowledge, and anyone who shares our vision will be able to join us.*

This document presents the results of the second phase of the open and participatory Movement Strategy process that has brought together close to 100 participants and stakeholders from across our Movement. Volunteers, staff and board members of affiliates and the Wikimedia Foundation, and representatives from allied organizations were actively involved in discussions over a nearly two-year period. Online discussions and occasional in-person events for working groups for nine priority thematic areas led to the development of the first iteration of the recommendations. With subsequent iterations, there were attempts to improve ideas and incorporate feedback from the Movement.

The current and final version of the recommendations and their underlying principles present structural and systematic changes that would pave the way for our Movement's future. The detailed strategic plan for how we actually bring all of this to life, and with whom, will be collectively developed in the upcoming implementation phase of Movement Strategy.

Purpose of the change
Our Movement has grown over the past 19 years in organic and distributed ways — independent, yet wholly intertwined. It has been built on the collective value of sharing free knowledge. Through an extraordinary collaborative global effort, our Movement succeeded in creating the world's largest encyclopedia, the largest media repository of freely licensed files, and sister projects encompassing an unparalleled collection of human knowledge.

Our growth and distribution have also presented challenges in aligning and coordinating the way we do things. Inequitable distribution of power, resources, and opportunities prevent us from fully maximizing our potential as a global movement. Our Movement needs a shared understanding of the vastness of contributions across different communities and better awareness among internal and external stakeholders so we can thrive. Improving communication and collaboration is of paramount importance if we wish to achieve our strategic goals. We also have to directly address the barriers and circumstances that prevent people from utilizing or participating in our Movement. Our goal by 2030 is to eliminate the gender gap and focus on the inclusion of underrepresented groups in our communities and projects.

The world where we began in 2001 is different from the one we operate in today and will be radically different from the world of 2030. Increasingly, there are threats against free knowledge and an open Internet. Censorship and surveillance pose real risks to many communities and in some regions endanger the lives of those who advocate for and contribute to free knowledge. The development of technology and services driven by profit margins are jeopardizing our existence. Wikimedia projects risk becoming obsolete as multiple formats of information flood virtual spaces, sometimes at premium prices and sometimes with bias. As a Movement synonymous with

free knowledge and verifiable information, we have a collective responsibility to be intentional with the impact of our work and the knowledge we share.

These challenges and the ever-changing world around us also offer opportunities that can advance us in our strategic direction. More than ever, there is a growing need for reliable sources of information and knowledge to counter misinformation. Open access resources are receiving more attention in the academic world. Online service-providers are looking for ways to disseminate accurate, well-sourced information. Novel opportunities open doors for new collaboration models, innovation, and increase the potential reach and impact of our projects without compromising our values.

Key aspects of the change

This document introduces significant structural and cultural changes that address the needs of our diverse Movement and encourage us to make the most of emerging opportunities. It was developed by our Movement for our Movement. Some people welcome the proposed changes, others may not. Some changes will be relatively easy, others may be difficult to implement.

Through these recommendations, Wikimedia will change in the way our platforms provide safe collaboration spaces and are inviting to those who contribute and consume knowledge. We will become more people-centered to address the needs of all people who power our Movement and those we serve. Anyone who shares our vision will be able to join us as we offer engaging, adaptable, and flexible experiences of the Wikimedia ecosystem. The sustainability of our Movement depends on recognizing and supporting the diversity of its contributors and their activities.

To be more efficient as a Movement and better align internally and externally with our partners, we need support systems to ensure coordination, communication, and continued relevance and growth. Whether rethinking existing systems or creating new ones, we require Movement-building initiatives to support contributors in local, regional and thematic contexts, and to have more equitable, legitimized, and trusted decision-making. By creating and strengthening organizational structures, communication channels, and tools to contribute, we will move toward a more cohesive Movement with communities that trust each other and cooperate at full potential.

Implementation

Many of the initiatives put forth in this strategic document will require further exploration. Implementation will be informed by additional assessments, consultations with communities and other stakeholders, and customized adaptation before becoming reality. As a first step, initiatives that result from these recommendations will be prioritized and then sequenced with clear roles, responsibilities, and resources in discussion and agreement with Movement stakeholders. Experimentation, documentation, evaluation, and iteration will be vital to the success of each step. In addition to adequately resourcing the initial implementation of the proposed initiatives, resources (finances and workforce) will need to continue to be available for the iteration and adaptation of each step as we usher in a new decade towards 2030. Wikimedia reminds us that the greatest thing we will ever build is the thing that we build together.

Movement Strategy Principles

What is a strategy principle

Principles are the fundamental beliefs that guide work across our Movement. The Movement Strategy recommendations are built and will be implemented based upon these ten principles. They are integrally connected and together speak to what it means to be a Wikimedian.

PEOPLE-CENTEREDNESS

People-centeredness means that every aspect of our Movement must address the needs and challenges of the people who power it and whom it serves, so that each one can contribute in their best way to the sum of human knowledge. Our [Movement](#) is powered by individuals and groups, the majority volunteers, and partners working across cultures and geographies. These [stakeholders](#) have unique needs, which technology, policies, practices, and structures must address for them to be empowered and able to contribute free from barriers. For our Movement to grow rich in diversity, it is necessary to raise awareness about those who are absent. To welcome them, we need to collectively and inclusively take responsibility and encourage change.

SAFETY & SECURITY

The well-being, security, and safety of all participants is a prerequisite for sustaining and growing our projects and communities. Without the foundational development of a safe environment, it will be impossible to be [inclusive](#), grow diverse, provide knowledge [equity](#), develop partnerships, and become the essential support system of the free knowledge ecosystem. Participants should feel safe in both online and offline spaces, and achieving this will require changes to the current culture throughout our Movement. Rather than merely advocating for safety, we will invest in making our environment safe by adopting policies and providing technology, [resources](#), and infrastructures to protect the privacy and security of our Movement participants.

INCLUSIVITY & PARTICIPATORY DECISION-MAKING

Inclusivity is at the root of the development of processes, practices, and structures for the Wikimedia Movement to grow rich in diversity of perspectives and identities. We aim to build our infrastructure based upon intentional community development and by addressing existing privileges as well as barriers to participation. By empowering and developing the skills of those within, we increase the [accessibility](#), [usability](#), localization, and dynamism of our ecosystem (technological platforms, processes, and organizational structures). Structures and platforms need to be [adaptable](#) to not only empower those who are already in our Movement, but to embrace those yet to join and others who were previously excluded or overlooked. This is needed to help address gaps in our representation of people, genders, and content. Intentional effort must be made to ensure all voices are included and have a clear role in decision-making processes that impact them and our Movement.

EQUITY & EMPOWERMENT

Striving for [equity](#) requires Wikimedia stakeholders to treat everyone fairly and based upon their circumstances. The merits of a truly open movement are based upon a constantly evolving process of overcoming capacity challenges (technical, administrative, linguistic, financial, etc.)

for people to be empowered and reach their utmost realized potential. Equitable representation and participation are not the same as equal opportunity and access for empowerment. A policy that applies equally to everyone may result in inequity if it disproportionately advantages one group compared to another. Equality requires providing the same thing to all; equity requires providing opportunities at appropriate levels for each community and context, recognizing that some people are starting at a disadvantage.

SUBSIDIARITY & SELF-MANAGEMENT
Our Movement will make decisions at the most immediate or local level wherever possible and will open pathways for more participatory decision-making. Subsidiarity means that our online and offline communities across the world should make decisions for themselves whenever possible. It is based on the notion that they are capable of identifying their own capacities, opportunities, needs, and barriers to represent the sum of human knowledge in their areas of work. With accountability and transparency, they will self-manage their resources and activities and provide for their needs to overcome obstacles.

CONTEXTUALIZATION
Contextualization **allows us to recognize that there is not a single set of processes that are efficient and effective everywhere**. Given the diversity of our Movement, our work and engagement must be evaluated and adapted to various geographic, cultural, socio-political, and economic contexts as we adapt to changes in our world. We recognize that what works in one community may not apply to another. To ensure the continued growth and sustainability of our Movement, we must appreciate our differences and ensure that our ecosystem is designed with flexibility and local ownership. This ensures that we have a diverse base of Movement participants and contributors supported by localized resources, technology, and best processes.

COLLABORATION & COOPERATION
Collaboration and cooperation guide our Movement as we draw on our collective knowledge, experiences, and distributed expertise to improve our effectiveness and response to challenges. Much of our strength and impact lies in developing collaborative relationships and strengthening partnerships with stakeholders in the free knowledge ecosystem and beyond who have knowledge and resources that can help us innovate, adapt, and grow. In our Movement, we thrive on learning from each other and exchanging skills, knowledge, tools, equipment, and other resources so we all gain competency and are able to expand our impact, involvement, and contribution to the whole Movement. Collaboration and cooperation are fostered when contributors and organizations at all levels are empowered to work together, partner, or support each other in developing and attaining goals. The experience and expertise on how to grow and strengthen our Movement lie with the reciprocal exchange of knowledge among its people.

TRANSPARENCY & ACCOUNTABILITY
Transparency is fundamental to ensure everyone can clearly understand how our systems, governance, and collaborations work, and it enables participation and accountability to one another. Our actions will be made with deliberate commitment to transparency and accountability to and for one another. A system built by the collaboration of participants requires everyone to be accountable for its continued health, resilience, and success. This means that each individual shares proportional responsibility for the success or failure of the actions they take (or

fail to take) on behalf of the Movement. A transparent culture enables everyone to share in the same strategic direction, builds confidence in our projects, and promotes trust among participants.

EFFICIENCY

Efficiency guides the design of our processes, practices, and structures so that our efforts and resources are used to reach their utmost potential for impact. Efficiency is the ability to prevent wasting resources to produce a desired result. As we implement the Movement Strategy recommendations, we will build on our expertise and share our knowledge, as well as adapt to specific contexts where a general approach cannot apply, and meaningfully involve those impacted. Efficiency in a widely distributed and decentralized structure like the Wikimedia Movement can only be reached through accountability, transparency, coordination, and contextualization. It needs continuous and periodic evaluations to allow for learning and adaptation.

RESILIENCE

Resilience ensures our Movement is flexible, adaptable to internal and external forces, and sustainable over time. A resilient system has the capacity to recover and rebound quickly from difficulties and to evolve in the process of progressing towards its goals. Anchored in transparency and accountability, we can progress towards deploying the processes, practices, and structures resulting from this set of Movement Strategy recommendations. Likewise, through evaluation and participative decision-making processes, we can be dynamic, adapt quickly to different contexts, and learn from every situation.

Movement Strategy Recommendations

How to read the recommendations

The Recommendations that follow are structured in a What, Changes and Actions, and Rationale format. The *What* is the identified need or aspirational strategic focus. *Changes and Actions* presents outputs and outcomes to be developed to accomplish the *What*. And *Rationale* includes background and some of the reasoning why the changes and actions are required to help us move toward the 2030 Strategic Direction. These recommendations are interconnected and mutually supportive. They are not presented in any implied order of importance or priority.

Narrative of the recommendations

In order to fulfill the Strategic Direction of becoming the essential support system of the ecosystem of free knowledge, the Wikimedia Movement must have the people and resources required for it to thrive and grow. Ensuring the sustainability of our Movement is required for enabling all other recommendations.

We recognize that our Movement is people-centered and will make changes in our culture and structures to address the needs and challenges of present participants as well as emerging and future communities. For everyone to feel welcome, we will embrace diversity and actively work to remove barriers to improve the user experience for consumption and contribution of free knowledge. Ensuring safety will be crucial for inclusion and healthy participation.

Our Movement's strategic aspirations will only be possible if there is openness for redistribution of power structures in the offline community and a Movement-wide recognition of our accountability to each other. Equitable distribution of power and resources demands new thinking about how resources are generated, allocated and efficiently used, with accountability and transparency. Based on the principles of subsidiarity and self-management, we will encourage everyone to make their own decisions in their context. This will require a deliberate focus to improve coordination and knowledge management at all levels of the Movement. Distribution of power, equity, and empowerment of communities will only be successful with a significant investment in skills development and leadership.

The continuous production of high-quality content has always been the focus of our volunteer-based Movement and will continue to be. To reach knowledge equity and knowledge as a service, we will consider the impact of our content more strategically and innovate how it is collected, presented, and consumed. We will explore and integrate new formats of capturing and sharing knowledge into existing and new domains of content production and projects.

Because we aspire to global impact, we envision our Movement as self-aware and dynamic, able to continuously evaluate, learn and adapt. This way our Movement will be able to include and welcome diverse perspectives and get closer to sharing the sum of human knowledge.

1. Increase the Sustainability of our Movement

What

We will increase the sustainability of our Movement by supporting and investing in people's needs, whether newcomers or long-time contributors. We will adopt more robust, long-term, and equitable approaches towards generating and distributing financial resources among different stakeholders in our Movement.

While curating, editing and contributing content are the most important activities of our Movement, we know that there are other significant contributions to move us towards knowledge equity and knowledge as a service. These include public policy and advocacy, capacity building, outreach, research, organizing, and fundraising. For the growth and sustainability of our Movement, these activities need to be better recognized and sometimes compensated in certain contexts.

Consistent with Movement ethos and practice, editing will not be compensated, and revenue streams that interfere with the editorial independence of the content will not be pursued. We will empower and support local groups and emerging communities and organizations to tap into existing and new ways of acquiring funds and forging partnerships. While we grow and become more sustainable as a Movement, we will also align our practices to support the environmental sustainability of our planet.
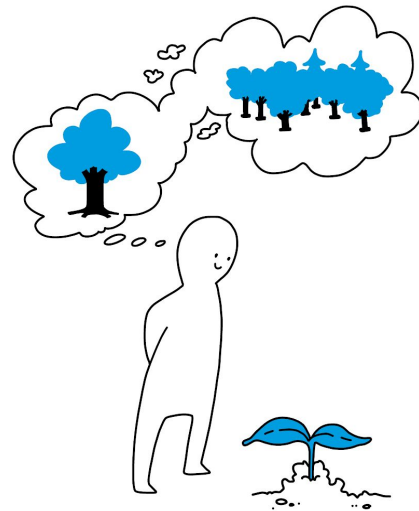
Changes and Actions

Human sustainability

- Develop a systematic approach to improve the satisfaction and productivity of people engaged in the Movement by:
    - Assessing the needs of groups and volunteers, taking into account their local contexts for effective support and recognition of efforts.
    - Continuously engaging and supporting publicly diverse types of online and offline contributors.
- Dedicate a significantly larger amount of Movement funding to support emerging and marginalized communities and groups based on their needs, including reimbursement for staffing, operational costs, and other activities not directly related to adding, curating or editing content.

<u>Financial sustainability</u>
- Increase awareness about the Wikimedia Movement, its values, achievements, projects, and communities worldwide - to secure the attention, trust, and interest of knowledge consumers, volunteers, partners, and donors.
- Create a policy applying to all Movement entities to outline rules for revenue generation and to define what may be [adapted](#) to local context and needs. This policy will balance sustainability, our mission and values, and financial independence. In accordance with this policy, we will:
    - Distribute the responsibility of revenue generation across Movement entities and develop local fundraising skills to increase sustainability.
    - Increase revenue and diversify revenue streams across the Movement, while ensuring funds are raised and spent in a transparent and accountable manner.
- Explore new opportunities for both revenue generation and free knowledge dissemination through partnerships and earned income. Possible examples include:
    - Building enterprise-level APIs (with high standards of availability, throughput, and usability).
        - Engage partners in the development wherever appropriate, incorporating the needs of a spectrum of small, non-commercial, and larger commercial reusers.
        - Explore fees or sustainability models for enterprise-scale commercial reusers, taking care to avoid revenue dependencies or other undue external influence in product design and development.
        - Develop appropriate safeguards to ensure continued free, unrestricted access for non-commercial, research, and small to moderate commercial use.
    - Active engagement of [third party](#) ecosystems in the development of MediaWiki technologies (e.g. Wikibase and Parsoid).
    - Providing professional and consultancy services concerning MediaWiki technologies.
    - Creating merchandising and making use of the Wikimedia brand.

Rationale

In our current setting, the vast majority of funds and staff are located in the Global North, causing an inequitable distribution of resources. To create the space for sustainable growth and [resilience](#) in our Movement, we need to take a more proactive approach in reaching out to those who are not yet represented in our communities. This also needs to be balanced by better means of valuing the contributions of those who are already in the Movement, or we may risk losing memory, momentum, capacity, and people because of burnout and turnover.

People. Our future is dependent on a healthy, diverse, and collaborative environment and on a continual inflow of contributors. However, we lack mechanisms to assure resources and capacities (e.g. money, partners, facilities) are available equitably across the Movement. We also lack mechanisms to recognize and enable on- and offline contributions for all participants. Increasing contributor recruitment and retention depend on improving procedures, processes, and frameworks to meet and support varied needs.

Financial Resources. The ambition of our strategic direction will require an increase in revenue for our Movement beyond the current incremental growth. The current model, heavily dependent on Wikipedia banner donations, lacks resilience against external changes and might become less effective with future technology and knowledge consumption trends. One example of such a shift would be decreased direct traffic and increased access through virtual assistants and search engines. We are missing the potential that comes with a diversified global approach, technological advances, and various revenue possibilities related to the use of our platform and product. With almost all revenue streams passing through few Movement organizations, there are missed opportunities and continuation of inequity.

2. Improve User Experience

What

We will continually improve the design of our platforms to be inclusive and to enable everyone — irrespective of gender, culture, age, technological background or skills, or physical abilities — to enjoy a positive experience during both consumption and contribution to knowledge throughout the Wikimedia ecosystem.

Improving the experience of users on our platforms will allow more people to join projects, access information, and contribute. This is a shared responsibility between developers, designers, and communities and requires collective action throughout the Wikimedia ecosystem. Enhancing the experience of users requires following a people-centered approach consisting of a well-defined, iterative and inclusive process of research, proposal, testing, and dissemination of the results.
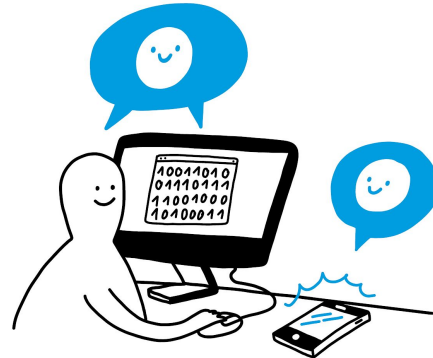
Changes and Actions

Improve methodology to identify, propose, test, and implement changes on Wikimedia platforms. For this:

- Involve representatives of designers, technical developers, communities, and user profiles in iterative user experience (UX) design, research and result dissemination processes to raise awareness and enable better decision-making.
- Test and validate the usability of products with different user profiles (advanced editors, technical contributors, and newcomers reflecting the diversity we aim for).
- Support compliance with the most advanced accessibility guidelines using free and open-source software (WCAG for web, W3C mobile web best practices, etc.).
- Inform communities about the state of UX, collaborate on needs, and support them in taking responsibility to be more inclusive by addressing barriers that prevent growth, diversification, and participation.

Create procedures and practices to improve the use of all Wikimedia projects, for those consuming or creating free knowledge, as well as extending functionalities. This requires working on specific characteristics of our products and platforms:

- Interfaces designed intentionally for a wide range of devices so users can consume and contribute in diverse contexts.
- Easy-to-find and easy-to-understand resources for newcomers, including onboarding media and guiding interfaces helping them independently learn and navigate.
- Spaces that allow finding peers with specific interests, roles, and objectives along with communication channels to interact, collaborate and mentor each other.

- Documentation and standards to capture platform functionalities for evaluation, learning, and improvement.
- Tools to connect cross-project and cross-language functionalities to provide an enhanced experience of the knowledge contained in the Wikimedia ecosystem for a particular interest, informational need, or inquiry.
- Clear pathways for advancing new wiki proposals (including new language versions) and for reusing community-developed software features on them.
- Developer tooling and high-quality documentation to allow technical contributors to create and maintain tools with usability and efficiency.
- Make the Wikimedia API suite more comprehensive, reliable, secure and fast, in partnership with large scale users where that aligns with our mission and principles, to improve the user experience of both our direct and indirect users, increase the reach and discoverability of our content and the potential for data returns, and improve awareness of and ease of attribution and verifiability for content reusers.

Rationale

People create and consume knowledge with an ever-increasing diversity of devices, interfaces, and interactions (e.g. virtual assistants). Understanding ongoing and future changes and adapting our platforms and spaces to meet diverse user needs will be vital to ensure free knowledge stays relevant on the Internet and for the sustainability of our projects.

Improving user experience can also help grow content, participation, and diversity. We need to encourage new members into our communities, considering that our projects rely on communities whose core editors — both in terms of contribution and functional roles — have not seen a lot of change in composition. This is especially relevant considering existing platforms might be complicated for many newcomers to acquire the technological skills to participate or find resources to guide them. The processes, tools, platforms, and communication channels that have grown around Wikimedia projects have created a steep learning curve for newcomers which some advanced contributors may not be aware of. It is necessary to continually assess user experience and improve ways to identify needs to achieve a more usable product.

3. Provide for Safety and Inclusion

What

We will establish Movement-wide standards for an inclusive, welcoming, safe, and harassment-free environment. This will enable us to better attract and retain new and diverse volunteers and grow as a movement.

We will ensure that current and future on- and offline contributors have the proper conditions and resources enabling them to participate without having their personal and communal security compromised. We will provide the framework (infrastructure and policies) as well as standards and procedures for the protection of all participants based upon a contextual evaluation adapted to different environments.

Changes and Actions

- Create a Code of Conduct, in collaboration with communities, to provide a universal baseline of acceptable behavior for the entire movement without tolerance for harassment. This will be done through an inclusive process with respect to context, existing local policies, as well as enforcement and conflict resolution structures.
- Create pathways for users to privately report incidents, either technical or human, including harassment, to have them addressed effectively and with appropriate urgency regardless of language or location.
- Establish a baseline of community responsibilities for safeguarding and maintaining a healthy working atmosphere for both online and offline Wikimedia involvement, along with procedures for reporting and follow-up.
- Research and develop an adaptable safety assessment and execution plan, as well as rapid response and support infrastructure. This would ensure that on- and offline contributors have available resources ready and accessible to mitigate the harm caused by their Wikimedia activities, including:
    - psychological support (e.g., therapists, counselors, mediators),
    - technical support (e.g., anonymization mechanisms),
    - legal assistance (e.g., list of partner lawyers, facilitation of legal representation at a local level),
    - a fast-track escalation path in life-threatening situations,
    - procedures for reacting to large scale challenges, such as socio-political unrest and environmental threats,
    - training and opportunities to raise awareness and build response capacity for community safety and conflict management.
- Develop local capacity for advocacy for legal and regulatory frameworks our communities need to make our projects thrive.

- Establish built-in platform mechanisms aimed at the safety of contributors in their contexts (e.g., anonymization mechanisms). To be assessed for opportunities and risks for particular projects or contexts including the risk of harassment and vandalism.

Rationale

Wikipedia is a story of success, and its long-term contributors are volunteers who have created the most valuable resource for learning we have ever encountered. However, our communities are not yet representative of the diversity of the world. They neither reflect the diversity of people working with knowledge, nor the diversity of knowledge to be shared. We also lack diversity amongst positions of responsibility. Among the common causes for the gender gap and other gaps in diversity in content and contributors is the lack of a safe and inclusive environment. This lack in the current culture of many Wikimedia projects limits the work and participation of existing communities and is a barrier for new people to join, including women, LGBTQ+, indigenous communities, and other underrepresented groups.

Furthermore, there is currently no systematic approach to support contributors who are at risk due to their participation in Movement activities (e.g., security threats in countries where freedom of speech is controlled), and neither is there the essential local capacity to protect contributors' anonymity (e.g. incident reporting). The needs and threat levels will differ depending on roles and responsibilities. Ensuring anonymity, privacy, and access to necessary security measures to address practices such as doxing and trolling is critical to strengthening and expanding our communities and to the sustainability of our Movement. We will not tolerate any toxic behavior among the participants of our Movement.
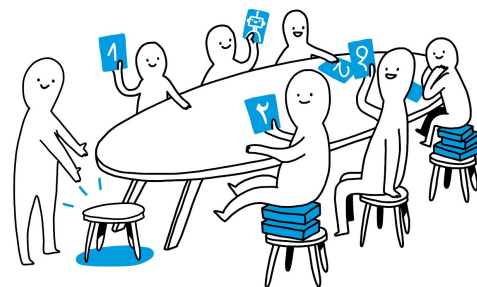
4. Ensure Equity in Decision-Making

Our Movement is composed of communities, individuals, and organizations from all over the world. By sharing accountability and responsibility as well as ensuring equitable opportunities for participation in decision-making and resource allocation, we will empower and represent all Movement stakeholders and have mechanisms to ensure all decisions that affect them are legitimate.

All Movement stakeholders will have the mandate, knowledge, and resources to be present in any decision-making process that affects them, make decisions, and have meaningful input on related issues including opportunities to access resources. Movement structures will serve and support every community transparently, responding to needs specific to each context, with a sense of urgency when required.

Movement structures will be adapted and created to ensure all Wikimedians can have their interests and experiences represented in decision-making. These structures will be rolled out at a sustainable pace. Their function and effectiveness will be continuously evaluated to allow for adequate design, iteration, and consultation.

This recommendation is structured with the following five subsections:
- Establish a common framework for decision-making
- Enable equitable representation in global decision-making
- Enable the empowerment of local communities
- Ensure participatory resource allocation
- Open pathways to decision-making roles

Establish a common framework for decision-making
What
Our Movement will make decisions that are contextualized because solutions to common challenges can substantially differ from one part to another. We aim for shared responsibilities and inclusion. To make this work, we will establish a Movement Charter to provide a sense of belonging, as well as clearly defining roles and responsibilities for current and future members of our Movement.

Changes and Actions
- Create a Movement Charter to:
  - Lay the values, principles and policy basis for Movement structures, including the roles and responsibilities of the Global Council, regional and thematic hubs, as well as other existing and new entities and decision-making bodies,

- ○ Set requirements and criteria for decisions and processes that are Movement-wide to be legitimate and trusted by all stakeholders, e.g. for
    - ■ Maintaining safe collaborative environments,
    - ■ Ensuring Movement-wide revenue generation and distribution,
    - ■ Giving a common direction on how resources should be allocated with appropriate accountability mechanisms.
    - ■ Defining how communities work together and are accountable to each other.
    - ■ Setting expectations for participation and the rights of participants.

- ● Establish a temporary committee, consisting of participants representative of the diversity of the global Movement, who will work openly, transparently, and in close collaboration with the broader movement and communities in order to:
    - ○ Serve as an Interim Global Council and play a leadership role in supporting the implementation of the Movement Strategy. This temporary committee will dissolve after the Movement Charter is finalized and the Global Council is established according to it,
    - ○ Oversee the development of the Movement Charter in consultation with communities, organizations and subject matter experts,
    - ○ Engage with the Board of Trustees of the Wikimedia Foundation to identify areas of its current responsibilities that must be transferred to achieve the goals of the recommendations, and;
    - ○ Design an independent and transparent process, along with an independent legal assessment, to transfer those responsibilities and authorities to the appropriate Movement-led bodies. In those cases in which the legal limitations of the organizational structure cannot be overcome, establish a social contract to allow those bodies to make legally non-binding but socially binding decisions. This ensures that the authorities and responsibilities of the Global Council and of the other Movement-led bodies are respected and they lead within the Movement.

Rationale

We are a diverse and growing Movement, and we need to include new voices and more diversity in decision-making processes. We aim to enhance mechanisms for trust and coordination between stakeholders, create a common understanding of what defines being part of our Movement, and have mechanisms to ensure that the processes and changes that affect the whole Movement are legitimate and trusted. Overall, it is fundamental to have a common framework to define how to work together and how to achieve the Strategic Direction to become the essential infrastructure of the ecosystem of free knowledge by 2030.

Enable equitable representation in global decision-making
What

To make Movement-wide decisions, we require a global structure that responds to the needs of our Movement as a whole and represents communities in an equitable way. In order to fulfill this function, a Global Council will be created.

Changes and Actions

We will establish a Global Council representative of the Movement in its role and composition. It will be composed of both elected and selected members, in a way designed to reflect the breadth and diversity of participation not only in the Movement at present but also in communities we wish to serve. This body will have authorities and responsibilities outlined in the Charter, and these should include, but not be limited to:

- Overseeing the implementation of Movement Strategy, with community input wherever possible, and its alignment across established structures of the Movement;
- Overseeing further development and endorsement of the Movement Charter;
- Enforcing accountability of all Movement organizations around:
  - Use of Movement funds;
  - Alignment with the Wikimedia mission, vision, and Strategic Direction;
  - Compliance with the Movement Charter;
  - Appropriate use of movement branding and marks;
- Setting frameworks on resource allocation and revenue generation for the Movement.
- Any responsibility that the Interim Global Council has identified as needing to be delegated by the Board.

The Board of Trustees of the Wikimedia Foundation presently has legal and fiduciary responsibility for Movement resources and oversight. Initially, the Global Council will be established as an independent structure with a mandate from the Board. This means that when making decisions in outlined areas, the Global Council will work closely with the Board of Trustees. Both entities will cooperate for the overall good of our Movement. Considering its legitimate authority conferred by representing our Movement, the Global Council may later develop further capacities and take on more responsibilities over time.

Rationale

By default – and due to the lack of a global structure – the Wikimedia Foundation Board of Trustees (the Board) currently has the task of making decisions for the whole Movement. However, there is a growing desire that a global, more representative structure is needed. As per the present composition and criteria for the Board, some key areas essential for the overall growth of the Movement are not well represented (e.g., technical expertise, Movement governance, and perspectives from emerging communities). To overcome these gaps, the Global Council will be empowered by the Board to give guidance in matters of strategic importance and specific delegated functions. Matters which affect Movement-wide strategy concerns will be referred by the Board to the Global Council.

Any decision affecting our communities has to involve those communities to prevent imbalanced outcomes. The Global Council, besides providing representation of communities, also ensures shared responsibility and accountability. Other existing Movement structures, such as the Affiliations Committee or Funds Dissemination Committee, will be reviewed and adapted during implementation and the development of the Charter.

Enable the empowerment of local communities

What

Regional and thematic hubs will empower existing and future communities to have the capacity and resources to make and implement their own decisions to meet their differing needs. This will ensure sustainability, resilience, and growth for the whole Movement. Regional hubs will allow contextualizing activities, tools, and information. If appropriately resourced, they will empower groups of affiliates to collaborate on capacity building, knowledge transfer, and coordination. Thematic hubs allow for specialization and work across the Movement, where shared objectives benefit from coordinated solutions. As a result, new connections and structures will emerge, or existing ones will be strengthened, which will bring the principle of subsidiarity into practice.

Changes and Actions

- Actively facilitate and support the creation of regional and thematic hubs as structures designed both on identified needs and patterns of success, including networks developing organically.
    - Assess which thematic (e.g. advocacy, capacity building, partnerships, research, etc.) or geographic areas of the Movement need structures that support coordination across stakeholders.
    - Hubs are either an enhancement of existing entities, collaborations between affiliates, or new structures formed for a specific purpose. They are expected to emerge according to identified needs and organic initiatives.
    - Hubs are independent in their daily work and operations, though coordinating with other stakeholders and sharing results of their work with the rest of the Movement.
- These structures will work toward high standards of diversity, inclusion, accountability, and equity in decision-making as per the Movement Charter.
- The concrete scope and functionality of these structures will be decided by communities and organizations based on their contexts and needs. These systems will follow the subsidiarity principle while making the following functions available:
    - Allocation of resources;
    - Providing legal support to community members and organizations, and evaluating safety and security guidelines and procedures adapted to local contexts;
    - Coordinating capacity building;
    - Supporting organizational growth through tailored advice and peer support (evaluation, funding, networking, mentorship, etc.);
    - Developing appropriate technologies to better serve communities.

As hubs emerge and develop, their scope and their governance will vary depending on the needs and capabilities of the communities they work with. A framework for evaluating the success and impact of hubs will need to be developed, as well as methods of ensuring that hubs are interconnected.

Rationale

Our historical structures and processes currently reinforce the concentration of power and resources in the Movement around established communities and entities. This means that a number of decisions are made without consulting diverse stakeholders affected by them, which not only hinders the growth of the Movement but also affects the legitimacy and impact of those decisions.

To achieve our strategic direction, stakeholders and systems across our Movement must function together as a collaborative, supportive ecosystem and avoid confusion over authority and repetition of work. The most effective approaches are respectful of local cultures and conditions and empower participants to develop, test, and share their own practices.

Our Movement has grown in independent and distributed ways, but still lacks the systems, agency, training, and infrastructure to support the next level of growth. It has often been difficult to make joint decisions involving multiple Movement organizations and communities, both for online work and offline activities. Due to various socio-political circumstances, it is difficult to provide resources, relevant guidance, or protection for communities in some contexts. These difficulties justify the need for an approach that is locally- or regionally-driven and coordinated across communities.

To ensure that Movement resources are more equitably distributed, it is necessary to create a more distributed decision-making process to give access to those resources. This can be done through distributed, decentralized power structures and resource allocation, which would also better equip smaller and new Movement stakeholders to expand in sustainable ways and develop the skills to take up leadership and agency.

Participatory resource allocation
What

It is essential that Wikimedia affiliates find paths for financial support to develop relevant skills, grow, build structures, and contribute to our Movement in an accountable and sustainable way. More participatory resource allocation processes will be created closer to stakeholders in order to ensure more equity and relevance to contexts.

Changes and Actions
- In the immediate future, the Wikimedia Foundation should increase overall financial and other resources directed to the Movement for the purpose of implementing Movement strategy.
- These additional resources should support new regional and thematic hubs and other Movement organizations in addition to existing Movement organizations and affiliates.
- In the near future, the Movement should play a guiding role in resource allocation. The processes for allocation should be designed through consultation and described in the Movement Charter. This transition to Movement-led guidance should occur in a timely fashion.
- The Global Council should oversee the implementation of the guidance given by the Movement as described in the Movement Charter, including recommendations for funds

allocation to regional and thematic hubs and other Movement organizations while recognizing the involved organizations' legal and fiduciary obligations.

- Based on frameworks set by the Global Council, regional and thematic hubs will facilitate resource allocation through approaches that are reliable, contextualized, flexible, and resilient to secure and sustain communities and organizations with multi-year plans.
- Funding systems will need to be flexible in terms of length, merging strategic goals of the Movement with local needs and directives, specifying mutual accountabilities, and opening pathways to local funding initiatives.

Rationale

Increasing [access](#) to money or grants will not alone be sufficient to address issues of inequity in how resource decisions are made or prioritized. Resources should be allocated *in and by* people in each context and tailored to address *their* needs. Resource allocation decision-making processes need to engage the strength, expertise, and knowledge of impacted communities. This way it will be possible to provide resources to support capacity building and empower our communities to be more sustainable.

Altering our resource allocation systems will ensure a more relevant and efficient resource distribution and will create more local agency and impact. A positive impact on the growth of the communities' capacities and their sustainability will allow them to be more autonomous and accountable.

Open pathways to decision-making roles
What

To build a more equitable Movement, roles and responsibilities will be clearly defined. Pathways to power positions will be open and transparent to avoid confusion and to include more diverse and representative voices. Mechanisms to resolve conflicts regarding mandate and authority over roles in our Movement will be designed and agreed upon.

Changes and Actions
- Establish good practice guidelines for how boards function, such as term limits, election and selection processes, and approaches to other governance questions where applicable and relevant for a community. These guidelines will need to be adapted and contextualized by each stakeholder. Boards would be held accountable for following good practices by the Global Council. For those that do not, the Global Council will create mechanisms to review and provide support.
- Collectively define good practice guidelines for how to both empower/inspire and enable/support new volunteers to run for different types of elected roles. These efforts will be particularly focused on underrepresented groups.
- Ensure leadership positions and ways of accessing them are documented, transparent, and accessible.

Rationale

The current power distribution within communities limits access to power positions for many, including women and other currently underrepresented profiles. Current structures (or lack of

structures) limit not only the possibilities of participating in positions of power but also the emergence of new leaders in our Movement**.**

Whenever the current power balance is challenged, conflicts emerge to protect existing structures, given the lack of overall guidance and joint movement-wide decision-making mechanisms to resolve them. Fair and open conflict resolution and power-limiting measures aim at balancing existing structures with equity. All of this will make Wikimedia inclusive of future communities and lead to a [cultural change](#) to grow to our full potential and diversity.

5. Coordinate Across Stakeholders

What

We will enhance existing and establish new organizational structures and practices that ensure comprehensive information exchange, learning, knowledge transfer, and networking opportunities with all Movement stakeholders as well as partners who share our vision. By coordinating resources and ensuring decision-making is equitable, these structures and practices will facilitate better engagement, faster reaction, and greater support across our Movement.

Changes and Actions

- Create and keep updated shared documents defining clear responsibilities and expected capabilities for specific activities like advocacy, capacity building, partnerships, product, and technology, among others. These documents will reflect common shared values, needs, principles, and accountability and facilitate growth and inclusivity.

- Create spaces for communication and collaboration between and with technical contributors to increase the scale and impact of our work and infrastructure sustainability:
  - Create a space for partners and other collaborators on specific content area workflows that require tools, updating, and improving.
  - Create a space for participation and communication for third-party developers.
  - Identify and resolve core barriers to make way for collaborative work on modern technologies, creating new interfaces, and improving our user experiences.
  - Create a Technology Council to establish processes for introducing new functionalities onto Wikimedia platforms and tools. The aim is to improve communication between staff developers and other technical contributors to better network, coordinate innovation, provide and obtain support, and foster input on decisions and resource allocations that impact communities.
  - Improve communication channels and spaces between developers and communities to receive feedback as well as to create processes for mentoring, training, and organizing code review and documentation writing, among others.

Rationale

Lack of clarity about the roles of various stakeholders, ineffective communication channels, and differing prioritization systems have created points of conflict, perceptions that decision-making occurs without consultation, and lack of unity. To improve understanding and engagement between volunteer communities and other parts of our Movement, attention, resources, and supporting structures need to be put in place.

Many significant software changes are approached without consultation and therefore lack buy-in and understanding across projects. This lack of coordination is worsened by inadequate support and ineffective communication with volunteers, technical contributors, partners, and developers in the community. They are often left at their own discretion in terms of maintenance and improvement of their tools, and both users and partners can experience many barriers (e.g. when sharing content). Establishing a central structure such as a Technology Council can guide the focus and coordination of developing new technology. Similarly, regional and thematic structures can facilitate coordination among diverse Movement stakeholders with greater clarity and shared understanding.

The need for better mechanisms to connect people with similar topical interests is evident at all levels in the Movement and with our partners. The importance of coordination will become more relevant as our Movement grows larger and more diverse, and creating solutions will have multiplier effects in the quantity and quality of free knowledge we can create and share.

6. Invest in Skills and Leadership Development

What

We will invest in individuals and organizations in our Movement and aligned partners to develop the technical and people skills crucial for the Movement's health and growth. We will do this by combining local skill development with global coordination so that communities can learn from each other, build upon existing expertise, and increase local skills for online and offline activities. These activities include editing and any other form of on-wiki participation, community outreach, volunteer management and recognition, advocacy and public policy, conflict resolution, developing partnerships, fundraising, organizational development, project management, and communication, among others.

We will also invest in individuals to develop the abilities needed to effect change in the Movement towards the strategic direction. We envision a Movement built by committed, well-trained, socially- and technically-skilled individuals from different backgrounds that reflect the diversity of global communities. Investing in skills and leadership development will allow us to intentionally make our Movement more distributed and sustainable.

Changes and Actions

- Create a systematic, global approach to skill development for local communities, their people, and their organizations. This requires us to:
  - Establish a methodology that maps assets and needs and generates aggregated data for deploying skills development initiatives based on real needs.
  - Establish a service that facilitates connecting/matching peers across the Movement for teaching and learning skills (e.g. peer-learning, networking, and pooling of information from partners and allies).
  - Encourage a diversity of methods, including training, mentoring, consulting, online learning, peer-to-peer support, and events.
  - Create incentives for skill development (online and offline) through the recognition of skills (e.g. through open badges).
- Create a systematic, globally-coordinated leadership development plan. This requires us to:
  - Establish a process to understand and model leadership according to skills necessary in each context.
  - Deploy tools or processes based on existing volunteer engagement that support communities in identifying potential leaders.
  - Invite potential leaders from other social movements to diversify and enrich the Movement through sharing experiences.
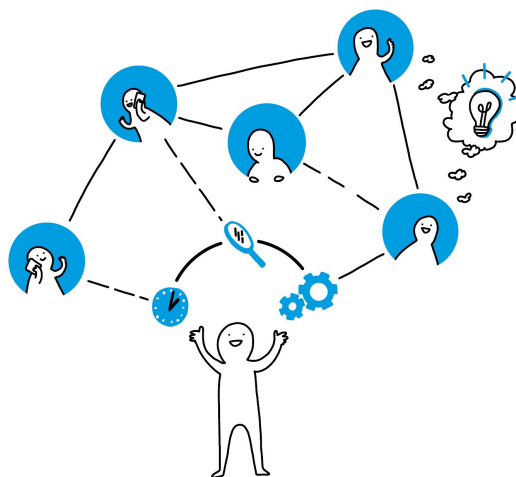
- ○ Provide training options (e.g. online, in-person) at local and regional levels to allow individuals to acquire leadership skills relevant to their communities.
- ○ Create an outline of the roles and skills that contextually encourages self-governance and ensures subsidiarity to empower communities.
- Invest in new or existing technological infrastructure which facilitates learning of skills through functional, collaborative, real-time tools and quality content. This requires:
  - ○ A user-friendly, searchable, multilingual, multi-format, curated platform to host learning resources (e.g. tutorials, videos, online training, etc.).
  - ○ Learning resources (e.g. "learning packs") directed to individuals and organizations joining the Movement to encourage self-directed knowledge acquisition and development of skills within our practices and roles.
  - ○ Learning packs required to understand issues that relate to scalability, sustainability and other areas considered in the Wikimedia Movement Strategy recommendations.
  - ○ Procedures to evaluate the quality of learning content and to facilitate the transfer of knowledge at global and local levels.

Rationale

Well-organized and well-established projects and groups have greater access to resources than others in our Movement. Linguistic, technological, cultural, economic, social, and other barriers prevent many stakeholders from accessing equitable opportunities and resources. Training topics in the past were not always selected based on community needs, and many proven methods and good practices for building capacity were not employed in our Movement. Much of the knowledge that exists in the people and organizations in our Movement is not tapped into for the benefit of peers elsewhere, while mentoring, coaching, online learning, and taking advantage of external expertise remain under-utilized.

Developing skills is also a matter of internal knowledge management. The platform MetaWiki has to date not been effective in allowing everyone access to high-quality learning materials and for connecting peers across the Movement for mutual learning and support. Newcomers face a steep learning curve and often get discouraged and leave, while seasoned Wikimedians are neither encouraged nor empowered to scale their contributions or share their expertise. Stakeholders are frequently isolated and forced to recreate work, instead of accessing, leveraging, and building upon existing capacities.

Leadership skills are key to building a Movement that represents global diversity. People who are active participants in various regions and contexts know what works well in their socio-economic, political, and cultural settings and are critical to the development of their communities. However, to date, we have not invested in formal training programs to develop volunteer leadership. This also aggravates the inequity of access to positions of responsibility in the Movement and makes it difficult for individuals from underrepresented groups to develop capacity. New leaders can bring a healthy rejuvenation to our Movement, prevent the concentration of power in a few hands, prevent the problems of burnout and drop out, and better represent our overall diversity.

7. Manage Internal Knowledge

What

We will make the internal knowledge of our Movement easy to capture, discover, consume, and adapt by all contributors to facilitate sustainability and resilience, individual and organizational skill development, and growth in an equitable way across all communities.

All internal knowledge produced in our Movement belongs to it. We will ensure its findability and usability by any participant to facilitate learning and growth. We will establish a base for internal knowledge (whether new or building on existing), dedicated staff for content curation (including discoverability and quality assurance), and user support, supplemented with a service/database of peers for matchmaking.

Changes and Actions

- Facilitate a culture of documentation to become integral to Wikimedia's work and evaluation and as an outcome in itself, by resourcing its creation in key areas, such as capacity building, advocacy, partnerships, and technology.
- Establish a knowledge-base system with access to all Movement learning assets.
  - Design the knowledge-base to be user-friendly, participatory, functional, multilingual, and searchable to store all the internal knowledge resources of the Movement so contributors can be aware of what exists and where to find it.
  - Create clear documentation regarding infrastructure development and scalability to transparently engage more Movement stakeholders.
  - Encourage the creation of metadata for every piece of internal knowledge to support its findability through search tools.
- Encourage the growth and maintenance of this knowledge-base following these practices:
  - Encourage sprints with focused scope to avoid cost and time overruns.
  - Adapt content, training, and learning to local contexts and involve diverse communities to ensure knowledge is accessible and available in multiple forms.
  - Provide dedicated staff to assist with content curation, discoverability, quality assurance, user support, and to facilitate peer-to-peer matchmaking.
  - Support the creation of reports to measure and evaluate the Movement's progress accurately, thus creating better awareness and setting informed priorities.

Rationale

Despite our Movement's success in creating an open and collaborative encyclopedia, we have not been very successful at managing our own internal knowledge. Internal knowledge to understand and measure progress towards our goals, to acquire new skills, share best practices, or to be more accountable to each other. Available information may be outdated, incomplete, or inconsistent.

This often results in duplication of effort and missed chances to build on each other's experiences, hindering the growth of the Movement and disadvantaging some communities. It also becomes an obstacle to distributing power as access to knowledge helps in doing one's work better (operational, technology, grants, tools, contacts, etc.).

Managing and documenting knowledge are activities that take time and the development of specific skills; doing them is less engaging than the work that frequently attracts volunteers, like editing and organizing. As a result, members of the Movement (especially volunteers) often document their activities and knowledge insufficiently or not at all. This leads to a lack of institutional memory, as their undocumented experiences, knowledge, and contacts are lost if they leave our Movement. Having good internal knowledge management is essential to onboard new contributors and help them develop skills, to allow new leaders to emerge, for small communities striving to grow, and for large ones to become more resilient and flexible.

8. Identify Topics for Impact

What

Our [Movement](#) achieves [impact](#) any time someone's life is enriched by using the content on Wikimedia projects or by participating in those projects. However, at present, we do not understand this impact well or have tools to measure it. We do not have the tools to identify which topics are most impactful in the world. The strategic direction sets out the need to develop and increase access to content that has historically been left out by structures of power and privilege. Alongside this, there are other areas that are likely to have high impact – for instance, content on major topics regarding humanity and its future, such as the UN Sustainable Development Goals.

When thinking about Wikimedia projects, [we](#) will value our content not just in terms of quantity, but also in terms of impact. We will respect and support the inalienable freedom of Wikimedians to [contribute](#) according to their interests. At the same time, we will encourage improving coverage of collectively-identified priority topics that impact our world and improve people's lives. Our projects will benefit from efforts of creating content based on the understanding we gain from research on topics and from prioritizing [resources](#) towards addressing identified gaps.
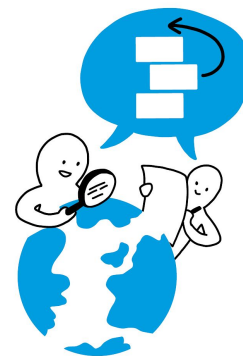
Changes and Actions
- Research how our content is used, measuring the coverage, quality, and verifiability of content, the public's trust, and their ability to [access](#) and understand our content. This will give us a better understanding of the different ways in which Wikimedia content can make an impact on improving people's lives.
- Understand how our projects can be misused or abused by detecting threats with significant potential for harm (such as misinformation, disinformation or scams).
- Conduct and support research and analysis to identify topic areas that have a high impact on the world and on knowledge consumers.
  - This requires developing tools to analyze content, creating a shared understanding of impact among Movement [stakeholders](#), and developing relationships with specialized partners.
  - Map topic areas in close collaboration with projects, partners and local [communities](#) to benefit from their expertise and ensure their autonomy and independence.
- Implement initiatives and prioritize resources to fill content gaps on topics which may have more impact, while respecting our long-standing [principles](#) of welcoming everyone who wishes to contribute to any topic within each project's guidelines. This might involve community initiatives, outreach, stipends, grants and other funding, partnerships, and

employing methodologies supported by technology, such as artificial intelligence and machine learning.

- Advocate for and build capacity around content creation and quality writing in areas where both editors and content are missing (or content is known to be biased), for example through regional and thematic hubs.

Rationale

Knowledge equity cannot be achieved without efforts to add content that has historically been left out. This focus will bring new content and new users to our Movement. Without understanding why people need the knowledge we curate, we cannot make our content as accessible, understandable, and useful for their lives as it can be. For this reason, it is necessary to research the different types of impact content may have and raise awareness about them to communities.

We cannot compare initiatives focusing on different thematic areas or topics. However, we know that some topics can provide much more personal and societal value to knowledge consumers and are beneficial to a much larger audience to take positive action in their lives and in their context. Some content deals with topics that are necessary to make decisions or give an understanding of what affects people directly, such as the biography of a candidate during elections or an affected area during a natural disaster. Failing to focus on the impact and relevance of content discounts the potential of free knowledge and can have repercussions on the sustainability of our Movement.

9. Innovate in Free Knowledge

What

We will continuously explore and expand the range of free knowledge projects to stay relevant and to serve our Movement's vision to give access to the sum of human knowledge. We will encourage people to experiment with and create new projects or policies to address gaps in knowledge equity.

We will innovate in different content formats, develop new software functionalities for Wikimedia projects, better integrate various tools in the editing experience, establish partnerships with other free knowledge projects, and improve our policies to include more diverse domains of knowledge and to deliver knowledge as a service for all.
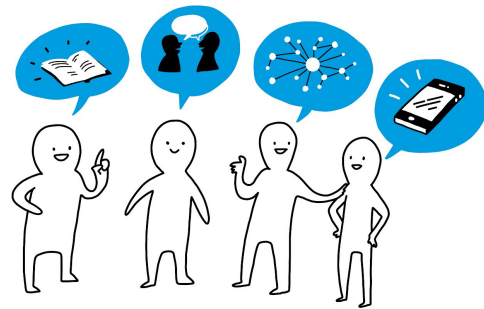
Changes and Actions

- Consult with communities and experts to identify policies in Wikimedia projects that act as barriers of access to content related to underrepresented communities (e.g. Notability).
- Create pathways to new projects, create new functionalities, or encourage communities to create new policies that address these barriers. The goal is to allow the inclusion and preservation of all forms of human knowledge in all socio-cultural contexts (e.g. encourage refining reliability criteria to provide guidelines to identify reliable sources from oral or non-Western knowledge resources, encourage ensuring that notability criteria are relevant in all contexts).
- Build the necessary technology to make free knowledge content accessible in various formats. Support more diverse modes of consumption and contribution to our projects (e.g. text, audio, visual, video, geospatial, etc.).
- Create tools and partnerships to facilitate bringing content from other data and knowledge bases to our projects.

Rationale

Wikipedia's characteristics have produced a successful encyclopedic, descriptive, and fact-based written body of knowledge, but they also have limited the content it can include. For example, because of an inability to comply with notability and sourcing policies, some topics regarding under- and unrepresented communities, like indigenous people who have not historically held positions of power and could not build the infrastructure to document it by the same methods, are left out.

Rich media content, such as audiovisual resources, is not used in Wikimedia projects as widely as on other platforms. There are also many important types of knowledge that are not encyclopedic

in nature, yet valuable (e.g., journal articles, tutorials, or genealogies). Therefore, we need to find innovative ways to overcome the limitations of existing Wikimedia projects in our goals of serving more free knowledge and including forms of knowledge from communities that are currently missing.

To make our projects technologically adapted to include more diverse formats of knowledge, there is a need to facilitate the reuse of our content on platforms beyond Wikimedia. In parallel, we also need to bring resources from other trusted platforms of data and knowledge to Wikimedia projects. These appear as inevitable in the current and future technological ecosystem we live in, which require change, flexibility, and experimentation to stay relevant.

10. Evaluate, Iterate, and Adapt

What

We will evaluate, monitor, analyze, and learn from our activities as a global Movement. This will improve our self-awareness and inform the improvement and development of what we do. Learning and evaluation should occur at and across all levels, to verify whether our work is making progress toward achieving our strategy. Processes will be based on the principles of participatory evaluation and will be adapted to the capacities of different communities (e.g., not time-consuming, easy to implement, supported by resources).

We will evaluate areas relevant to these recommendations, including equity, diversity, inclusion of newcomers, distribution of resources, content growth and coverage, identifying impactful topics, community health, equitable governance, skills development, partnerships, infrastructure scalability and sustainability, technology efficiency, quality assurance, bug fixing, and platform usability and accessibility. Results will be widely and clearly communicated across our Movement to increase self-awareness, resilience, and accountability among all stakeholders, allowing us to continuously adapt our strategies accordingly and perform periodic reviews to improve.
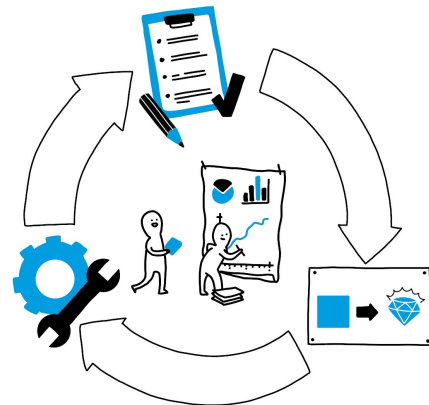
Changes and Actions
- Provide financial and human resources and expertise for collecting data for monitoring, evaluating and communicating progress on each of the recommendations and Movement activities at all levels of the Movement (global, regional, local).
- Distribute responsibilities around the processes of monitoring, evaluating and learning with all Movement stakeholders so that they have mutual accountability (including coordination and knowledge management) and ensure continual progress.
- Evaluate the relevance, effectiveness, efficiency, and impact of the development of the activities of the Movement.
    - Continuously evaluate the implementation of the strategy recommendations in real-time, and disseminate to impacted stakeholders.
    - Collaboratively establish common and contextualized indicators and desired impacts for measuring and monitoring progress on the goals of the strategic direction. This would include indicators for equity, advocacy, public policy, diversity in people and content, inclusion and openness towards newcomers, community health, technology, platforms' usability, and accessibility, among others.

- ○ Facilitate joint analysis, discussion and learning with the participation of communities and impacted stakeholders as appropriate.
- ○ Access external, independent research to complement self-evaluation where needed and appropriate (always based on principles of participatory evaluation regarding Programs).
- Share and communicate results broadly for each Movement area of work and for strategy recommendations to raise awareness and accountability, both among affiliates and contributors.
- Iterate change processes in the areas of technology development, coordination, capacity building, policies, and governance systems, and promote validation after research and testing. This requires us to:
    - ○ Involve affected communities/stakeholders to assure that lessons from the evaluation are shared to inform their activities at local and regional levels.
    - ○ Involve affected communities/stakeholders to implement, determine and communicate changes to the strategy recommendations and related activities/programs.
- Adapt to meet new and altered situations and challenges by adopting policies and procedures based upon evaluations of the changing Movement and the changing world. This requires us to:
    - ○ Increase the flexibility and adaptability of the structures and approaches we employ to implement each recommendation.
    - ○ Incorporate evaluation results into decision-making at all institutional levels.
    - ○ Use evaluation results to inform planning and budgeting of Movement stakeholders with fiscal and programmatic responsibilities.
    - ○ Evaluate external conditions (socio-political, legal, environmental, etc.) to anticipate them, act on them if we can, and adapt to changes.

Rationale

While our Movement has organically grown in many areas, there are challenges that bottleneck our efforts of achieving the strategic direction. To date, efforts to evaluate and learn from Movement stakeholders have been *ad hoc* and un-sustained, often lacking local adaptability and usable knowledge management. This is a challenge for collective accountability and learning from each other. The strategic direction requires new thinking, skills, and structures to build evidence-based best, good, and emergent practices. These practices would document, evaluate, and learn from the progress or failures of our activities towards the strategic direction, over the long term. Any structured plan requires a process to iteratively evaluate the current infrastructure, communicate its needs with the Movement, learn, and develop solutions to grow resilient and prepare for the future.

Glossary

The Movement Strategy recommendations present ideas at a structural and cultural level for the development of our Movement; they are pathways towards achieving our Strategic Direction. The following glossary has been prepared to provide definition and explanation for terms used in the recommendations, especially those that are not regularly used in our Movement. They offer perspectives from other domains and establish a connection between our present practices and ongoing global discussions.

Some terms are difficult to translate and might lead to misinterpretation of their meaning and intention. For this reason, definitions have been provided from accepted sources in each field. When terms have a specific meaning in our context, internal definitions are provided to offer clarity regarding the usage and of the multiple meanings and connotations terms might have.

Definitions reflect the thinking and discussions of the people involved in the drafting of the recommendations. Where there is existing practice, examples have been provided for how the terms might be used, understood, and discussed in our communities.

Term	Definition / discussion	Source / link
Accessibility	Accessibility here refers to the design of products, devices, services, or environments so as to be usable by people without regard to their abilities or achievement. In our Movement, there exist discussion pages and Wikiprojects to make the software more compliant with Accessibility Guidelines for Wikipedia, so everyone can perceive, understand, navigate, interact with, and contribute to free knowledge.	Henry, Shawn Lawton; Abou-Zahra, Shadi; Brewer, Judy (2014). The Role of Accessibility in a Universal Web. Proceeding W4A '14 Proceedings of the 11th Web for All Conference Article No. 17. ISBN 978-1-4503-2651-3. Retrieved 2014-12-17.
Adaptability	Adaptability captures the capacity of a stakeholder to learn, combine experience and knowledge, adjust its responses to changing external drivers and internal processes, and continue developing steadily. In our Movement, there is adaptability when decision-makers need to take into consideration the political and social circumstances from their context in order to plan their budgets and activities.	Walker, B., C. S. Holling, S. R. Carpenter, and A. Kinzig. 2004. Resilience, adaptability and transformability in social–ecological systems. Ecology and Society 9(2): 5
Capacity Building	Capacity building (or capacity development) is the process by which individuals and organizations obtain, improve, and retain the skills, knowledge, tools, equipment and other resources needed to do their activities competently or to a greater capacity (larger scale, larger audience, larger impact, etc).	https://en.wikipedia.org/wiki/Capacity_building

In our Movement, there are efforts in building capacity especially in the context of emerging communities. Conferences like [WikiIndaba](#) play such a role for the African-based communities to learn new skills and exchange knowledge. Wikidata training workshops are also an example of the capacity building of volunteers.

Community

In this document, community refers not only to content contributor communities but rather to *all* members of our Movement. It must be acknowledged that the Movement in its diversity comprises many communities and there is not one community that every single person subscribes to.

An example of Community is the sum of contributors to any Wikimedia project about a specific theme.

"[Community](#)" (2020). *Oxford Learner's Dictionaries*. Oxford, UK: Oxford University Press.

Contextualization

Contextualization in this document means that tools, policies, and decisions are made taking into account the specific socio-economic, political, and cultural circumstances and needs of impacted communities and collaborating with them to ensure decisions and solutions are adapted to their context.

An example of contextualization is the [localization](#) of our software and tools by developers who make it compatible with more languages and translate its different resources and spaces.

"[Contextualization](#)" (2020). *Oxford Learner's Dictionaries*. Oxford, UK: Oxford University Press.

Contributor

In this document, a contributor is anyone who contributes to the mission of the Movement. It can be an editor, Mediawiki developer, a curator, an organizer, staff, partner, or anyone else who invests time in Movement activities.

"[Contributor](#)" (2020). *Oxford Learner's Dictionaries*. Oxford, UK: Oxford University Press.

Cultural change

Cultural change is a concept from the sociology of organizations. It designates the modification of the values and habits of an organization (i.e. processes, implicit culture, communication channels, roles and goals). Changing an organization's culture can be required if the current culture does not allow it to achieve its vision.

Denning, Steve (23 July 2011). "[How Do You Change An Organizational Culture?](#)" *Forbes*. Jersey City, New Jersey: Forbes Media. ISSN 0015-6914.

Equity

Equity is treating everyone justly based upon their circumstances and with consideration of the barriers that prevent them from having the same level of achievement, in contrast to treating everyone equally.

Dressel, Paula (26 March 2014). "[Racial Equality or Racial Equity? The Difference It Makes](#)". *Race Matters Institute*. Roswell, Georgia: JustPartners, Inc.

Kuttner, Paul (29 October 2016) "[The](#)

		[problem with that equity vs. equality graphic you're using](#)". *Cultural Organizing*. Salt Lake City, Utah: Cultural Organizing Organization
External	In this document, external refers to participants, entities, events, and conditions outside the Wikimedia Movement. An example is a partner organization that supports the vision and mission of our Movement. E.g. Amnesty International's collaboration with Wikimedia chapters in Argentina, Netherlands, Indonesia, Belgium, Poland, Denmark, and the UK	"[External](#)" (2020). *Oxford Learner's Dictionaries*. Oxford, UK: Oxford University Press.
Hubs	Hubs are a type of support structure to enable a common space for coordinating activities and identifying and advocating for the needs of the communities and organizations they serve. They can focus on supporting a specific region or a global thematic area.	"[Hub](#)" (2020). *Oxford Learner's Dictionaries*. Oxford, UK: Oxford University Press.
Impact	The impact of something is all the consequences it has on the world (both intended and unintended). Evaluating impact means looking at how the world would be different if that thing did not exist/happen. Impact evaluation is a common tool for maximizing the good that can be done, given limited resources.	White, Howard (June 2009) "[Theory-Based Impact Evaluation: Principles and Practice](#)" *3ieimpact.org.* New Delhi, India: International Initiative for Impact Evaluation.
Inclusion	The act of reducing exclusion and discrimination (e.g., regarding age, social class, ethnicity, religion, gender, sexual orientation, etc.) by both individuals and groups through modifying settings, policies, cultures, and structures to create the proper conditions for the emergence of diversity.	Ainscow, Mel; Booth, Tony; Dyson, Alan (2004). Improving Schools, Developing Inclusion. London: Routledge. ISBN 0–415–37236–4
Internal	In this document, internal refers to people, systems, processes, and other resources that are within the Wikimedia Movement. An example of internal is a partnership between two or more Movement organizations, including the close collaboration between affiliates in Iberocoop, WikiFranca, WikiIndaba, or projects like Wikidata	"[Internal](#)" (2020). *Oxford Learner's Dictionaries*. Oxford, UK: Oxford University Press.

Knowledge management	A system of administering, creating, curating, sharing, and using knowledge that is critical to an organization and the people who participate in its activities, ensuring that information is on hand and readily available. In our Movement, knowledge management should be done in every project and by every stakeholder. The generated internal knowledge is currently spread across different affiliate websites, internal shared documents and common global spaces such as the platform MetaWiki.	Servin, Géraud; De Brún, Caroline (July 2005). "ABC of Knowledge Management". *Food and Agriculture Organization of the United Nations.* Wigan, UK: NHS National Library for Health.
Mentorship	A learning and development partnership between someone with in-depth experience and someone who wants to learn. While the mentor may be older or younger than the person being mentored, both mentor and mentee benefit from the exchange within the relationship. In our Movement, mentorship happens both in an informal and formal way, across many communities and between members of the affiliates. e.g. mentorship programs taken up by Wikimedia Argentina, CIS-A2K.	Farren, C. (2006). Eight types of mentors: Which ones do you need. *PDF). MasteryWorks. Inc.*
Movement	In this document, "Movement" refers to any and all stakeholders in affiliates, projects and communities, the Wikimedia Foundation, and partners who are aligned with the free-knowledge.	https://en.wikipedia.org/wiki/Wikimedia_Movement
Principle	A principle is a fundamental proposition that serves as the foundation for systematic change.	"Principle" (2020). *Oxford Learner's Dictionaries.* Oxford, UK: Oxford University Press.
Resilience	The ability to recover from sudden changes, disruptions, and disturbances. In our Movement, an example of resilience is the ability of the communities to spring back from lawsuits, censorship, and blocks on projects.	Almedom, A. M.; O'Byrne, D.; Jerneck, A. Jerneck (2015). "Principles of Epistemological Accountability with Methodological Implications for Measuring, Assessing, and Profiling Human Resilience". *Ecology and Society* **20**(3): 9. http://dx.doi.org/10.5751/ES-07313-200309
Resources	An economic or productive factor, such as people, materials, revenue, technology, and other assets required to accomplish an activity and achieve the desired outcome.	"Resources" (2020). *Oxford Learner's Dictionaries.* Oxford, UK: Oxford University Press.

	In our Movement, an example of resources is the monetary and human capacity of a community or affiliate.	
Scalability	Scalability is the property of a system to handle a growing amount of work by adding resources to the system.	Bondi, André B. (2000). Characteristics of scalability and their impact on performance. Proceedings of the second international workshop on Software and performance – WOSP '00. p. 195. doi:10.1145/350391.350432. ISBN 158113195X.
	In our Movement, examples of scalability are cross-wiki features for Commons or Wikidata, or the ability to upload media/data once instead of separately for all the wikis.	
Self-management	Self-management replaces the hierarchical pyramid in organizations by interdependent networks of small, autonomous teams. Thus, power and decision-making is no longer concentrated on the top but distributed.	Laloux, Frederic (2015). "Self Management". *Reinventing Organizations Wiki*.
Stakeholders	Any individual or group, whether volunteer or not, having invested human, financial, or other capital in an organization, who can affect the realization of organizational objectives or is affected by the realization of those objectives.	Definition from Cambridge Dictionary,
	In this document, a stakeholder is everyone who has a stake in fulfilling the Movement's vision. More precisely, the term includes online and offline communities, organized groups like affiliates and the Wikimedia Foundation, and members from our broader ecosystem, like partners and allies.	
Subsidiarity	The principle of subsidiarity holds that decision-making authority is best placed (a) where responsibility for outcomes will occur; and (b) in the closest appropriate proximity to where the actions will be taken that will produce the outcomes.	Wolf, P. J. (2001). "Principle of Subsidiarity" in Smelser, Neil J.; Baltes, Paul B. (eds.) *International Encyclopedia of the Social & Behavioral Sciences*. Amsterdam, Netherlands: Elsevier Ltd. ISBN 978-0-08-043076-8 via *Science Direct.*
Support	To give or be prepared to give help to someone if necessary. In this document is understood as people in the Movement being able to help each other with the necessary resources.	"Support" (2020). *Oxford Learner's Dictionaries*. Oxford, UK: Oxford University Press.
Sustainability	In this document, sustainability refers to the viability of maintaining a system or process over time and at scale.	"Sustainability" (2020). *Oxford Learner's Dictionaries*. Oxford, UK: Oxford University Press.
	An example of sustainability is the organization of Wiki Loves initiatives with the support of volunteer	

communities and affiliates. These initiatives have grown multiple times and succeeded in having a high contribution ratio.

Third-party

Third parties are people who interact with a system but are not the ones creating it (the first party) nor the ones it is created for (the second party). In the Wikimedia context, it usually refers to those who use or develop Wikimedia software but are not part of the Wikimedia movement themselves - for example, GLAM partners using Wikibase, businesses running MediaWiki-based websites, or MediaWiki consultants working for such businesses. All the third parties together are usually referred to as an ecosystem, since they are not aligned as a single actor, nor share an intent or common strategy, but the shared platform they use gives rise to shared goals and interests with the Wikimedia movement.

Underrepresented

A group of people who are omitted or not represented in a given situation at the same level as they are represented in the larger population.

Eg: In our Movement, examples of underrepresented or unrepresented people are women in all language communities, members of indigenous and LGBTQ+ communities, among others. Any group of humans is underrepresented in the measure that it does not participate in the creation of knowledge.

DeSutter, K. L. (2013). "Minority Students in Teacher Education: Diversifying America's K-12 Teaching Force" (pp. 501-516). *In* Wang, Victor X. (ed.) Handbook of Research on Teaching and Learning in K-20 Education. Hershey, Pennsylvania: Information Science Reference. ISBN 978-1-466-64250-8

Usability

An attribute of quality that assesses how easy user interfaces are to learn and use by those who need to use them. This involves effectiveness, efficiency, and satisfaction in a specified context of use.

In our Movement, and particularly in the MediaWiki software, the VisualEditor interface is more usable than typing Wikitext and the Content translation tool also gives a good example of how the task of translating articles becomes easier to manage.

Nielsen, J. (2003). Usability 101: Introduction to usability. *NNGroup.com*. Fremont, California: Nielsen Norman Group

Jokela, T., Iivari, N., Matero, J., & Karukka, M. (August 2003). "The standard of user-centered design and the standard definition of usability: analyzing ISO 13407 against ISO 9241-11". In Proceedings of the Latin American conference on Human-computer interaction (pp. 53-60). ACM.

User Experience

A consequence of a user's internal state (predispositions, expectations, needs, motivation, mood, etc.), the characteristics of the designed system (complexity, purpose, usability, functionality, etc.) and the context (or the environment) within which the interaction occurs

Hassenzahl, M., & Tractinsky, N. (2006). User experience-a research agenda. Behaviour & information technology, 25(2), 91-97.

(organizational/social setting, the meaningfulness of the activity, the voluntariness of use, etc.).

In our Movement, User Experience depends on the type of engagement — either as a reader, editor, or any other type of contributor. The online dimension of it is influenced by the platform design, the policies and rules, and interactions with others. The offline dimension is in relation to the structures, roles, and processes that govern them.

We

The word "we" in this document always stands for "we, the Wikimedia movement". This "we" contains volunteers, groups, staff, and organizations who contribute to the Wikimedia vision alike.