

Supporting Organizational Effectiveness Within Movements

A Wikimedia Foundation Case Study

Funders supporting movements face a unique set of challenges when trying to support organizations working for the same cause. In their efforts to increase organizational effectiveness, foundations invariably face questions of credibility and control, and sometimes encounter diverging understandings of success. This case study profiles how TCC Group – with its partner, the Wikimedia Foundation – developed an innovative, participatory approach to these challenges, resulting in increased organizational effectiveness in the Wikimedia movement.

The Challenge: Growing Pains

The Wikimedia Foundation (WMF), which operates some of the largest collaboratively edited reference projects in the world – including Wikipedia – was at a critical juncture in 2014. In its short history, the Foundation had seen a dramatic increase in the number of groups around the world applying for recognition as Wikimedia organizations, and its grantmaking arm was grappling with an increasing need to fund the most effective among them. (There are over eighty Wikimedia groups today, with significant autonomy. Some of them are national “chapters,” some are user groups and thematic organizations.) The Foundation was concerned about organizational growth not corresponding to effectiveness and strategy.

“While grant requests and overall budgets have increased year after year for almost all the organizations, impact has not grown at the same rate. Organizations have appreciably improved in their ability to create targets and develop metrics and measures, without always showing the corresponding ability to execute and demonstrate proven results.”¹

While organizational effectiveness is a common concern with nonprofit organizations and networks, especially ones that are growing, the de-centralized culture of Wikimedia presented some unique challenges and opportunities. In a movement that so strongly valued the autonomy of individual organizations, what did it mean for the Foundation to attempt to increase their effectiveness – and how could it do this in a way that was not top-down? Furthermore, the Foundation was concerned that its financial support was fueling momentum toward larger-budget, “traditional” or staffed nonprofit structures which might not be consistent with its history and mission as a global free-knowledge movement created and driven largely by individual volunteers.

The Foundation was grappling with **two fundamental questions**:

1 How could the Wikimedia Foundation help Wikimedia groups make a clearer connection between their strategies and their desired impacts without being directive about those strategies and desired impacts?

Anecdotally WMF knew that some chapters were “more effective” than others, but without clear criteria for success it was difficult to determine how or why some groups were thriving. The broader organizational culture resisted uniform standards, since success could look different for different groups.

2 How could the Wikimedia Foundation help Wikimedia groups increase organizational effectiveness while respecting their unique goals and cultural contexts?

The Foundation wanted to think carefully about what role(s) it should play to support local efforts, given the breadth of organizations’ needs. Ideally, it also wanted to enhance the connections and learning between organizations. As one Wikimedia UK volunteer put it: “There’s clearly a big desire for shared learning and mentoring within the movement. How can we make it happen?”

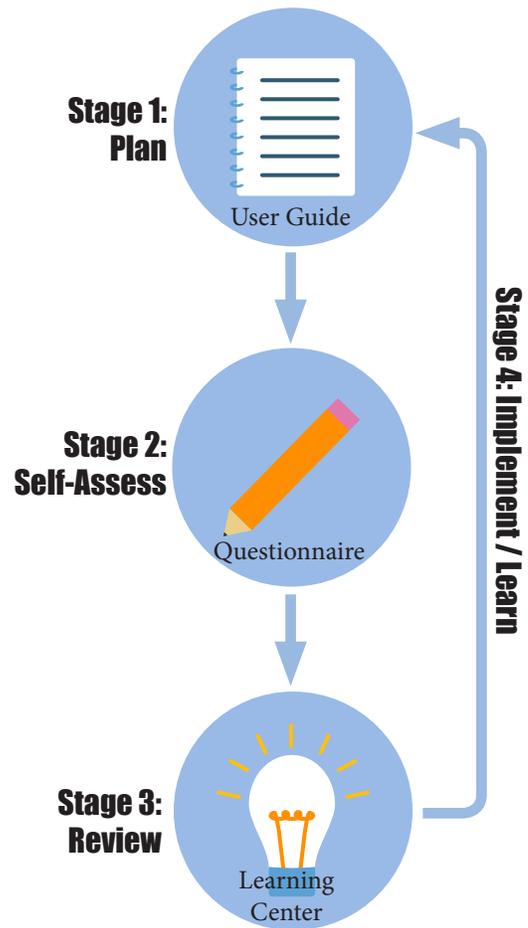
WMF came to TCC Group (TCC) to help it address these questions. In close partnership with the Wikimedia Foundation, TCC consultants developed a three-staged process that focused first on defining impact and the most effective strategies to achieve that impact; second, on assessing the ability of Wikimedia organizations to successfully execute those strategies; and third, on defining the resources and skills that Wikimedia organizations needed to effectively execute their work.

The Solution: An Open-Source Approach to Organizational Effectiveness

In initial conversations, movement stakeholders voiced some skepticism about the value that consultants could bring in as “outsiders,” and the concept of organizational effectiveness in general. Though they were passionate about the Wikimedia mission of promoting free content, they had not articulated their outcomes or strategies; in early discussions it was clear that even terms such as strategies, outcomes, and impact were not universally or commonly understood. From the outset, it was clear that success would be unattainable without a highly inclusive, participatory, and flexible process to match the diverse needs of Wikimedia organizations around the globe; the “how” was just as important as the “what” in this engagement. To that end, TCC adapted its usual framework to design an intentionally collaborative plan that would meet the needs of the non-hierarchical movement.

1 The first step was an **in-person introduction of the project with stakeholder groups** before it officially launched, at the annual Wikimania Conference in London. This enabled the TCC team to immerse itself in the Wikimedia environment and culture, to field questions about the purpose of the work, and further refine the process based on volunteer input.

2 The second step of the three-staged process was the **creation of a “Pilot Group” – a diverse microcosm of movement organizations** that tested an early iteration of what became informally known as the Wikimedia O.E. Tool. Feedback from the Pilot Group enabled TCC and the Foundation to anticipate obstacles and make critical changes to the Tool prior to its movement-wide rollout, ultimately increasing uptake of the Tool by organizations. In tandem, TCC drafted case studies highlighting three “positive deviant” organizations, showcasing how three very different Wikimedia entities were able to achieve impact in practice. The case studies had a two-fold effect: they de-coupled the idea that more staff and bigger budgets necessarily led to more impact, and they also served as an instructive example to peer organizations.



Wikimedia's Organizational Effectiveness (O.E.) Tool

3 The final step will likely involve eventual **transition of ownership and operation of the Tool**, to a non-Foundation entity, giving it more legitimacy within the movement, and a platform for sustainability and improvement over time. Today, the Foundation and other Wikimedia organizations are continually gathering more data about how the Tool is working for organizations. As part of this learning process, the Wikimedia Foundation plans to work with organizations using the Tool to develop case studies illustrating how organizations have applied their self-assessments – stage two of the three-part Tool – to their individual planning processes. This data collection and sharing will help inform whether and how best to transfer the Tool to a non-Foundation platform where it can be used independently.

“Trying to understand and then offer useful analysis in such a complex environment is difficult; the Wikimedia ecosystem is a dance between individual volunteers, the organizations that seek to serve them, and the larger mission and movement that binds them together across the world. TCC did well in understanding multiple perspectives to this work, and adapting their tools to serve such a complex global ecosystem. In particular, TCC’s benchmarking of other organizations ... was deeply useful to both the Foundation staff and community members... The O.E. tool, in turn, continues to be in use and – as Wikimedians do best – is likely to be improved upon by the experiences of all those who use it.”

– Anasuya Sengupta,
former Senior Director of Grantmaking
at Wikimedia Foundation

Deliverables and Results

Wikimedia Foundation realized the following outcomes:

- Comprehensive data on which strategies Wikimedia organizations are using, and the self-reported strengths and challenges of those approaches
- Capacity-building roadmap for helping Wikimedia organizations address their organizational effectiveness challenges and capacity “gaps”

Wikimedia Organizations realized the following outcomes:

- Improved understanding and articulation of the impact they are trying to achieve
- Identification of the specific strategies they are using to have an impact
- Method to self-assess their ability to successfully execute those strategies
- Learning Center with capacity-building recommendations tied to their results report
- Growing online platform to share organizational effectiveness knowledge and lessons with one another
- Template and recommendations for how to build their own individualized capacity building plans
- A “living” O.E. Tool which all Wikimedia organizations can adapt and improve over time

A Note on Inclusivity and Adaptive Capacity

In many client engagements, TCC Group designs and employs data collection tools to gather information that is critical for clients to make decisions, overcome challenges, and move forward. In the case of Wikimedia, one (comprehensive) tool actually became the solution. TCC was able to adapt its process over time by listening, learning, and working collaboratively with not just the Wikimedia Foundation directing support to the free knowledge movement, but also the organizations that were implementing strategies on the ground, across the globe. Because of this joint commitment to inclusivity and participation between TCC and the client, both parties noticed each other’s unanticipated, and significant, outcome of this work: a culture shift within the movement toward more positive attitudes, discourse, and behavior regarding organizational effectiveness, and a new interest in learning O.E. lessons from both within and outside the Wikimedia community.

¹ General remarks made by the Wikimedia Funds Dissemination Committee, during the 2014-2015 round of recommendations. The Funds Dissemination Committee (FDC) for the Wikimedia movement is a committee of community members that makes recommendations to the Board of the Wikimedia Foundation (WMF) about how to allocate funds to movement organizations.

This case study was prepared in consultation with Wikimedia Foundation.