

**Input for the Movement Roles working group**  
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**Created for Jon Huggett, facilitator of the MR group**  
**March 23, 2011**

Purpose of this document: This document was created in response to questions sent by Jon (in bold below) to Sue, to help in the Movement Roles working group process. These are my personal opinions only: this document hasn't been reviewed or approved by anyone else. This document is not confidential. Please feel free to share it with anyone you like, including posting on public wikis. If you want clarification about anything I've said here, just tell me.

**1) Goal achievement - the Wikimedia movement strategy has just been published with some very clear goals ... where is the current set of Wikimedia groups and entities on target to hit the goals, and where is it falling short?**

Through its year-long collaborative strategy development process, the Wikimedia movement set itself five key strategic priorities: 1) To stabilize infrastructure, 2) To increase participation, 3) To improve quality, 4) To increase reach (readership), and 5) To encourage innovation.

Quantifying progress towards those priorities isn't easy: some things are easier to measure than others, and there is no simple way to set measures that accurately capture everything we want to do. Having said that, we were able to create five targets that, although they will not encompass all our aspirations, should give us a sense of whether we're making appropriate progress overall. These targets were set by the Wikimedia Foundation and approved by the Wikimedia Foundation Board of Trustees, but we welcome their adoption by other movement players.

- 1) Increase the total number of people served to 1 billion
- 2) Increase the number of Wikipedia articles we offer to 50 million
- 3) Ensure information is high quality by increasing the percentage of material reviewed to be of high or very high quality by 25 percent
- 4) Encourage readers to become contributors by increasing the number of total editors per month who made >5 edits to 200,000
- 5) Support healthy diversity in the editing community by doubling the percentage of female editors to 25 percent and increasing the percentage of Global South editors to 37 percent

Currently, we are making progress on targets 1, 2 and 3. For target 4, we are currently going in the wrong direction: the number of active editors is actually falling rather than increasing. We don't yet have change-over-time data to tell us how we're doing with target 5, but there is no reason for optimism. It is clear that our problem area is participation and diversity-in-participation. We must continue our success in readership, and the quality and quantity of information we provide to readers. But we must redouble our efforts related to participation and diversity-in-participation, because that is where we are failing.

**2) Goal alignment - some in the chapters have questioned the right of the Wikimedia Foundation to set goals for the movement ... how well can the movement align around a shared set of goals, and what should the movement do or not when chapters are not aligned with goals?**

I reject the premise of the question. The Wikimedia Foundation facilitated and supported a movement-wide strategy development process involving more than 1,000 participants. Through that process, the movement set strategic priorities for itself: the Wikimedia Foundation did not set goals for the movement. I am not aware that any chapters are unaligned with the strategic priorities of the movement, nor am I aware that any chapters have set goals or targets that conflict with the movement

goals or the Wikimedia Foundation's targets. I would be surprised, actually, if a chapter or its members had a fundamental disagreement with the strategic priorities: they are extremely high-level and in my view entirely uncontroversial.

Having said that, as a thought experiment: it's a reasonable question to ask what should happen if a chapter set for itself goals that were fundamentally out of alignment with the goals of the Wikimedia movement. To pick a ridiculous example: let's say that a chapter decided its energy would be better put towards housing homeless people, rather than advancing the mission of the Wikimedia movement. In that case, I think it'd be incumbent on the chapter to reflect on whether it really ought to be a Wikimedia chapter. If its goals, however worthy, were fundamentally different from the goals of the Wikimedia movement, it probably ought not to be a Wikimedia chapter; it should probably reconstitute itself as something else.

At this point, it would be up to the chapter to make that determination, because currently there is no mechanism or body in the Wikimedia movement with clear responsibility for overseeing the activities or practices of international chapters. ChapCom scrutinizes chapters prior to their approval by the Wikimedia Foundation Board of Trustees, but ChapCom has no responsibility for overseeing their activities or practices once they are approved by the Wikimedia Foundation Board of Trustees. This fact that there is no oversight of chapters' activities poses a risk to the Wikimedia movement.

The risk includes, for example, the following:

- Risk of a financial or other scandal damaging the reputation of the Wikimedia movement;
- Risk that a chapter would publicly endorse a position in conflict with Wikimedia values, damaging the reputation of the Wikimedia movement;
- Risk that a chapter could be infiltrated by people seeking to monetize the brand or otherwise conduct activities counter to Wikimedia's principles, thus damaging Wikimedia's reputation;
- Risk that an inactive chapter will continue to exist, and will thereby prevent others in that geography from self-organizing to do good work that a chapter would normally do;
- Risk that a chapter would behave inappropriately in a variety of ways, damaging Wikimedia's relationships with schools, governments, galleries, libraries, museums, archives and other influential players in that geography and possibly other geographies;
- Risk that a chapter will not align around movement priorities, thereby preventing the Wikimedia movement from collectively achieving its full potential.

Those risks are all "normal": meaning, they are risks faced by all decentralized networks.

However, our risk is heightened by our highly-unusual situation. Most Wikimedia chapters are run by volunteers, and most of those volunteers are young. Meanwhile, the Wikipedia brand is world-famous and extremely valuable, and hundreds of millions of people --who could potentially be monetized-- visit Wikipedia monthly. The Wikimedia movement chooses for ideological reasons not to fully exploit the financial potential of its brand and its readership, but that potential nonetheless exists, and is very attractive to people who would like to exploit it. The financial opportunity represented by the Wikimedia movement, combined with the inexperience of chapters' boards, makes chapters very vulnerable.

Currently, the Wikimedia Foundation Board of Trustees is the only entity with any argument for having oversight responsibility vis-a-vis the Wikimedia chapters, and its responsibility and authority are extremely unclear. That's a problem for everyone: it creates quite serious risk to the movement.

### **3) Funding - how best should money flow to align with movement priorities?**

Funding should be fairly simple: money should go to support activities that advance the mission.

Our current funding practices don't make much sense. Here is the current situation:

Currently, the Wikimedia Foundation fundraises to support its activities and to build a modest reserve (which ranges throughout the year from between three to 13 months' burn rate: it starts high post-fundraiser and is gradually used up throughout the year). The Wikimedia Foundation needs a reserve because the projects are dependent upon its continued operation: servers need to be bought and installed, bandwidth needs to be paid for, the 990 has to get filed, legal threats have to be fought off. The Wikimedia Foundation fundraises primarily via the annual winter online fundraising campaign, with those revenues supplemented by foundation grants and major donor gifts plus an extremely small amount of revenue associated with business development activities (mainly trademark licensing).

Currently, chapters also bring in donations. In 2010, 12 chapters acted as payments processors for the annual fundraising campaign in their geography. Nine of those are in Europe, and represent wealthy countries with strong charitable traditions. Those chapters signed agreements pledging to transfer to the Wikimedia Foundation 50% of the revenues they process, although not all have been able to find legal mechanisms yet for doing that. Some chapters also conduct other revenue-generating activities, such as seeking grants or selling merchandise: 100% of that revenue stays within the chapter.

This current state is neither good nor sustainable. Currently, chapters get the ability to act as payment processors solely based on their expression of willingness and ability to comply with the terms of the fundraising agreement, and they get the ability to fundraise in other ways by just doing it. The amount of revenue they bring in is determined by a number of factors including: 1) the wealth of the residents of that geography, 2) how charitably inclined those residents are, 3) the appropriateness of online fundraising to those people and how they tend to give money, 4) the success of the messaging created by the Wikimedia Foundation, and its applicability to the people seeing it, 5) the reputation and impact of Wikipedia in that geography, and 6) any additional messaging created by the chapter itself, as well as 7) its successful stewardship of past donors. Of those seven factors, only the last two are controlled by the chapter, and only one (the chapter's messaging) has anything at all to do with the chapter's ability to design and execute activities that advance the mission work of the Wikimedia movement.

To call out some specifics: Residents of France, Germany and the UK give 10 times as much money to charity overall as do residents of Finland, Austria and Portugal: should those chapters therefore be 10x wealthier? A resident of Sweden is 10x more likely to donate to charity than a resident of Lithuania: do the Swedish people deserve a chapter that's 10x as rich and effective? The world's richest country is the United Kingdom, and the poorest is Somalia: should the people of the UK benefit from activities and programs and support that is entirely denied to the people of Somalia?

We want to create a world in which every single human being can freely share in the sum of all human knowledge. In order to do that, it's obvious that money will need to be transferred from fundraising-receptive countries to pay for activities supporting countries that are less wealthy, and/or less receptive to fundraising. In effect, wealthy countries like France, the United States, Canada, Germany and the UK will need to fundraise to pay for activities in high-potential but low revenue-generating countries such as Indonesia, Turkey, Brazil, Armenia, Egypt and Morocco. ("High potential" in this instance refers to potential for high strategic impact.)

Upshot: here are some guiding principles for fundraising that I think make sense for us. We should consider adopting these, or some version of them:

- 1) Our fundraising activities should aim to achieve the highest possible overall financial support for the Wikimedia movement;

2) All Wikimedia fundraising activities should be truthful with prospective donors. We need to tell people what we intend to use the money for, before they donate. And we need to report how it was actually spent, afterwards.

3) Funding should be spent on activities that support the mission, and have shown themselves to be at least somewhat effective in achieving impact;

4) The Wikimedia movement is international in scope, and donations should not be assumed to stay in the country of their origin. The Wikimedia Foundation is a transfer point: it brings in money from wealthy countries, and uses it to fund activities and initiatives supporting everyone.

5) Spending decisions should be made on the basis of projected impact, while acknowledging that much of our work is experimental, and that experimentation needs to be supported.

I will note here that some chapters have sometimes indicated a desire to themselves manage where money raised in their geography is spent -- e.g., the French chapter might want to choose to direct money raised in France to French-speaking African countries, or the Dutch chapter might choose to direct money raised in the Netherlands to Indonesia. Practically speaking, this is unworkable and does not scale. An example: last year the Wikimedia Foundation was asked for money by a German group which Wikimedia Germany had previously declined to fund. As a result, the Wikimedia Foundation and the German chapter have now agreed that the Wikimedia Foundation will consult with Wikimedia Germany before spending money inside Germany. That's a good outcome, but it doesn't scale to the entire Wikimedia movement: if 30+ entities are all required to consult each other before transferring money to multiple geographies around the world, we would have spending gridlock. The Wikimedia Foundation is the appropriate mechanism for transferring funding from wealthy (fundraising-receptive) countries to poorer countries: if the Wikimedia Foundation didn't already exist today, we would need to invent it for that purpose :-)

#### **4) Board decision making - where does the Wikimedia Foundation board have a role in making decisions for the movement, or not, and should this change?**

The Wikimedia Foundation Board of Trustees is the only entity with any claim to be able to make decisions for the entire Wikimedia movement: it is global in scope and membership, it is majority-elected by the Wikimedia movement, and is accountable to it. The Wikimedia Foundation owns the trademarks and the servers, and it pays the bills that enable the Wikimedia projects to continue operating. It is a unique movement entity.

**Decision-making vis-a-vis editors:** The relationship between the Wikimedia Foundation Board of Trustees and the projects is fairly clear. The Wikimedia Foundation Board of Trustees does not get involved with the day-to-day editorial operations of the projects nor does it have a track record of making bold or unpopular decisions.

Because of its scope and role, the Wikimedia Foundation Board of Trustees is in a unique position to exercise global community leadership, which it occasionally does in a gentle and restrained fashion. For example, in April 2009 the Board published a resolution on Biographies of Living People, calling upon the global Wikimedia community to take several actions related to biographies of living people, designed to increase the quality of those articles.

([http://wikimediafoundation.org/wiki/Resolution:Biographies\\_of\\_living\\_people](http://wikimediafoundation.org/wiki/Resolution:Biographies_of_living_people))

I consider this expression of global community leadership by the Board to be a positive development and part of the ongoing maturation of the Wikimedia movement. Originally as I understand it global leadership was solely (and very rarely) exercised by our founder Jimmy Wales. That was both normal and good in the early days, but it's neither ideal nor sustainable: as just one person, Jimmy, of course,

cannot speak every language, be familiar with every culture and be personally involved with every project. It strikes me as a measure of the successful maturing of the projects, that today global leadership is expressed not by a single person but instead by a 10-person board representing multiple countries, cultures and languages, supported by an international staff and explicitly accountable to the global movement.

And I think it works reasonably well. The Wikimedia Foundation Board of Trustees is in a good position to exercise global editorial leadership: it has a solid, deep understanding of how the projects work; it increasingly is supported with performance data and analysis prepared by the Wikimedia Foundation staff; it has recently wrapped up a strategy development process with participation from 1,000+ volunteers, and its membership includes a healthy mix of people from quite different backgrounds.

Sometimes people express anxiety that the Board will be overly intrusive/interventionist, but I would say the reality is in fact the opposite. There are very strong checks and balances constraining the Board's ability to make decisions affecting the global community. They include: i) the board's own good judgment and awareness of its own limitations, both as individuals and a collective, ii) capacity limitations: they are 10 busy people with limited time together for formulating interventions; iii) their built-in accountability to editors via the election and chapter selection processes constrains them from being too radical, and iv) their lack of direct control over the Wikimedia movement: There is no obligation on the part of the community to do what the Board says; if the community disagrees with positions taken by the Board, it can ignore them. All this IMO normally results in the Board erring very much on the side of caution, and tending to survey and interpret community opinion rather than boldly staking out a position of its own.

This results in a system which, for good and less-good reasons, is heavily biased towards the status quo. There is very little risk of the Board making decisions that go beyond its scope. There is however IMO a risk of the Board failing to make important decisions -- in effect, failing to be sufficiently brave, bold, interventionist.

**Decision-making vis-a-vis the Wikimedia Foundation itself (staff):** The relationship between the Wikimedia Foundation Board of Trustees and the staff is quite clear: the staff report to me, and I report to the Board. There are three primary mechanisms for the Board to make decisions that affect the work of the staff of the Wikimedia Foundation:

1. The Wikimedia Foundation Board of Trustees hires the ED and evaluates her performance annually;
2. Every year, the Wikimedia Foundation Board of Trustees approves the annual plan, which lays out for the coming year strategic priorities, programmatic goals and targets, revenue targets, a spending plan and activities plan. The process of developing the annual plan begins with the board being consulted for its priorities each winter, and concludes with final approval of the plan in June;
3. The Wikimedia Foundation Board of Trustees engages in wide-ranging discussions at its face-to-face meetings and on its mailing list and wiki. At any time, the Board of Trustees can request the ED to carry out a decision it has made via those discussions, by passing a resolution to that effect. For example, both the Controversial Content project and Movement Roles II grew out of discussions among Board members and the ED on the mailing list and in person.

The Board is supported in decision-making by information provided to it by the staff, primarily in the form of the monthly reports and the annual report. These reports include information on project performance, financial performance, staffing and programmatic activities. The Board also sometimes commissions from the staff, and/or is offered, special reports on particular topics.

**Decision-making vis-a-vis chapters:** I believe the relationship between the Wikimedia Foundation Board of Trustees and the chapters is fairly unclear, and I believe that lack of clarity is a significant

problem for the movement, if only because it's stressful and painful for everyone.

It is clear that the Wikimedia Foundation Board of Trustees does not have 100% oversight of the chapters: the chapters are legally independent entities. It is also clear that the Wikimedia Foundation Board of Trustees does not have zero oversight of the chapters: it is the Wikimedia Foundation Board that grants --and can therefore also revoke-- chapter status.

In recent years, the Wikimedia Foundation Board of Trustees has taken significant steps to increase the linkages between it and the chapters, to increase its accountability to chapter organizations, and to enable chapters to have a voice in the Wikimedia Foundation's work. For example, in April 2008, it granted the chapters the ability to select two board members for the Wikimedia Foundation Board of Trustees. Several years ago, it began to stage one of its board meetings in conjunction with the chapters meeting, each year in Berlin. It is currently sponsoring and leading the Movement Roles 2 process aimed at clarifying roles-and-responsibilities among movement players, and it has ensured significant chapter participation in that process. In sum, IMO, the Wikimedia Foundation Board of Trustees has worked hard to create linkages and feedback loops, to ensure good relationships and strong accountabilities that should enable it to be taken seriously as a good-faith partner in decision-making.

However, I am not sure that the chapters acknowledge the Wikimedia Foundation Board of Trustees as having a legitimate role in decision-making that affects the chapters. And honestly, this troubles me. All organizations benefit from and are strengthened by mechanisms that support accountability and legitimacy, and currently chapter organizations are accountable to no-one outside their geography. If their actions and activities affected only people in their geography this might be fine, but of course they do not: the entire Wikimedia movement is interrelated, and the activities of individual entities have implications and repercussions for the broader movement.

Some chapters seem to take great pride in remaining independent from and unconnected to the rest of the Wikimedia movement. Some don't publish activity reports or share information, they don't participate in movement-wide discussions such as the strategy project and the Movement Roles project, and they don't comply with the requirements of chapter agreements and fundraising agreements that they willingly signed. This past winter, a chapter board member told me his chapter has no obligation to report lack of compliance to the Wikimedia Foundation: that "if you wish to enforce the contract, it is up to you to monitor it." That kind of talk baffles me. Our job is to work together to advance the Wikimedia mission, and I find some chapters --not often, but sometimes-- bizarrely hostile and antagonistic, rather than aiming to be good collaborative partners in our shared endeavour.

**5) Other movement-wide decision-making - the Wikimedia movement has evolved a set of decision-making bodies (e.g. Chap Com) and processes that may not scale well ... which decision-making processes need to be improved now and in the future to make them more effective, more efficient and more responsive?**

This is not a comprehensive answer, but there are two areas that leap to mind for me here.

#### **1) Meta-level community decision-making.**

For the most part, editorial decision-making in the Wikimedia projects works really, really well. The projects have done an excellent job of developing, in a decentralized fashion, community decision-making mechanisms (such as Arb Com) that work. 99% of the time things function smoothly and good outcomes are achieved. Having said that, I think there are two gaps, areas where good robust decision-making mechanisms are missing: i) Community (editorial/behavioural) issues that extend beyond a single project in a single language, and ii) Community (editorial/behavioural) issues inside a single project/language-version, that cannot be resolved internally by that project and that are

damaging other projects.

An example of each:

i) A community issue that extends beyond a single project in a single language would include for example the decline in active editors that was discovered and publicized in the Editor Trends Study released in March 2011. This is an important issue that is affecting most projects in most languages. Currently, there is no mechanism for the affected projects to come together to discuss the issue, and to make decisions about how to handle it. This leaves the Wikimedia Foundation as the only entity with any scope to address this very serious problem. But, the Wikimedia Foundation has limited ability to influence the community.

IMO the Wikimedia movement as a whole would benefit if there were a Volunteer Council type entity, visible and accountable to the global community, charged with the responsibility of investigating major issues such as the decline in active editors, and recommending changes to the community or to the Wikimedia Board, based on its investigations. I know people are highly uncomfortable delegating that kind of authority to others, and I understand that. It seems to me therefore that constructing a body with only authority to recommend (not decide) would resolve that concern, while still going some distance to solving the problem.

ii) A community issue inside a single project/language version, that cannot be resolved internally inside that project, and which is hurting other projects. An example of this might be if Wikimedia Commons were routinely deleting images used by multiple language versions of Wikipedia, or if the English Wikiversity were harboring trolls attacking English Wikipedia, or the Spanish Wikinews were regularly publishing libel-filled articles. Currently, there is no mechanism for projects to exercise any oversight over each other -- indeed, there is enormous resistance to the idea. That resistance makes sense: the basic principle that decisions should be made by people who care enough to show up and work hard is a good one. But small projects in particular are vulnerable to being taken over by problematic editors: we know that some projects tolerate destructive behaviour because they feel they have no choice.

IMO the Wikimedia movement as a whole would benefit if there were a group of trusted volunteers, visible and accountable to the global community, charged with the responsibility of investigating cross-project problems, and recommending solutions.

A note here: in my experience Wikimedia community members in general tend to be either conflict-seeking or conflict-averse: there isn't much middle ground. Many, many editors have told me they stopped editing on a particular topic to avoid conflict, or they seek out topic areas that no-one cares about in order to avoid conflict, or they have a strong opinion about a particular policy issue but don't say it in order to avoid conflict. Good, constructive community members tend to back away from nasty disputes. I understand why they do that, but it has the effect of ceding the ground to conflict seekers and extremists. I think good Wikimedians have a responsibility to ensure difficult disputes get resolved properly, and I think they would be likelier to do it if they felt asked to do it on behalf of other editors who trust and will support them.

## **2) Oversight of chapters (and potentially future trademark-using organizations/associations).**

I noted elsewhere in this document that there is no body with responsibility for overseeing and assessing chapter performance. I think this is a serious problem for the Wikimedia movement: i) Chapters could become effectively defunct/inactive but nonetheless continue to exist for many years, thus denying others the opportunity to participate in chapter work, and denying the rest of the Wikimedia movement the benefits of the work of that chapter; ii) Chapters (noted elsewhere to be run mainly by volunteers with little organizational experience) could make mistakes that harm the Wikimedia movement, which oversight could avoid or more quickly fix; iii) Oversight implies

reporting/transparency, which offers the possibility for chapters to learn from each other, thereby accelerating each other's development; iv) Oversight furthers accountability and therefore also legitimacy; and v) In the absence of agreement with regard to oversight and assessment, the Wikimedia Foundation itself uncomfortably acts as overseer: this is awkward and non-ideal, and strains relationships between the Wikimedia Foundation and chapters.

IMO the Wikimedia movement as a whole would benefit if there were a global group charged with responsibility for overseeing and assessing chapter performance. Such a group could perhaps include a Wikimedia Foundation staff member responsible for monitoring compliance with chapter and fundraising agreements, as well as perhaps representatives from the Board of Trustees and/or audit committee, and chapters themselves. This group would have the authority to recommend to the Wikimedia Foundation Board of Trustees revocation of chapter status and/or sanctions against chapters.

**6) Peers - some other volunteer-based global organizations have avoided national chapters (e.g. Mozilla), de-emphasized them (e.g. Creative Commons), or worked hard to globalize them (e.g. Médecins Sans Frontières) ... what would you most like to understand about peers?**

I would love to hear lessons learned from peer organizations: traps they fell into and warnings they would give us. Jon, I know you've done a lot of work in this area (helping international non-profits structure themselves to support their mission activities) -- it strikes me that this is something you could just do yourself for the group, verbally or in writing. I think it would be a real missed opportunity if we didn't explicitly ask you, as part of this process, to share what you know from other organizations.

**7) Legitimacy - the vast majority of Wikimedians do not affiliate with any specific entity, chapter or group ... if there are 100,000 users making 5+ edits a month, as far as we can tell, only ~1-2% is a member of a chapter or group ... does this mean that we either need to make groups more relevant to individuals, or entities less important in the movement, or both?**

The beauty of Wikipedia is its frictionlessness. If someone wants to make a contribution (e.g. by fixing a typo), they can just do it: they don't need to seek permission or give us their real name or fill out a form. That's why Wikipedia works --- because it empowers people to edit, without making them jump through a bunch of hoops first. And the editors (collectively) are the most valuable people in the Wikimedia movement, because they are the folks directly creating the service for our readers. The chapters, the Wikimedia Foundation and other groups: all exist to support the work of good editors.

So IMO, if we measure our success as a movement based on how many editors are involved with groups (e.g., are chapter members, voted in the Board of Trustees election, read the Wikimedia Foundation's monthly report card), that puts the cart before the horse. It forces editors to adapt to organizations, whereas we should aspire to do the opposite. I believe that an editor should be able to work productively and helpfully on Wikipedia without ever needing to know anything about the Foundation, the chapters or any of our other groups. Editors should be able, if they choose to, to have zero communication with the groups supporting the movement, and zero knowledge of them.

(That doesn't mean the Wikimedia Foundation and the chapters don't want to communicate with editors. We want to communicate with at least some people some of the time, because knowing what editors want and need is essential for us to fulfil our responsibilities. I am just saying we shouldn't measure our collective success based on our ability to persuade editors to care about, or know about, what we're doing.)

So, I do not believe that Wikimedia groups need to become more relevant to individual editors.



Whether entities need to become less important to the movement is a different question, and I guess I can only say it depends what the entity's contribution is.

- The Wikimedia Foundation's contribution to the movement is critical, even if only because the Wikimedia Foundation buys the servers and pays the bandwidth bills. The projects literally would not continue to exist if the Wikimedia Foundation and its work disappeared tomorrow: that makes the Wikimedia Foundation indispensable. Additionally, I believe that the Wikimedia Foundation has a critical role to play in collecting and making available global performance data and analysis about the projects: work such as the Editor Trends Study published a few weeks ago. And, I believe it has a critical role to play in being a kind of clearinghouse for experimentation in activities designed to improve our impact. Some activities it will lead itself, others it will fund. In both cases, it should act as a central point for people for documentation of best practices and lessons learned. I believe the importance of the Wikimedia Foundation to the movement should grow, as the capacity of the Wikimedia Foundation grows. I also believe we will need to earn that importance by being transparent, accountable, and effective in our activities.
- The chapters currently have a great deal of influence over the Wikimedia movement: i) Apart from the Wikimedia Foundation, they are the only entity that currently has the right to use the trademarks; ii) Many act as payment processors during the online fundraising campaign, and historically have been allowed to retain a significant amount of cash derived from the fundraiser to spend in their geography; iii) In April 2008, the chapters were granted the ability to select two (of 10) board members for the Wikimedia Foundation Board of Trustees; iv) Chapters stage an annual meeting alongside the Board of Trustees meeting, each April; and v) Chapters have access to a special "internal" wiki and mailing list, which gives them privileged access to Wikimedia Foundation Board and staff members. Given that influence, it is important to note that only one-fifth of the world's online population currently resides in a geography where there is a Wikimedia chapter, which means that four-fifths of the world's online population have no ability to benefit from chapters' influence over the movement as a whole. Until the entire online population has access to a chapter, it is perhaps difficult to justify the disproportionate influence granted to a person in, for example, Norway, at the expense of a person in, for example, Turkey -- particularly given that currently, chapters' influence in general disproportionately accrues to people in wealthy European countries.

It's also worth noting that the chapters currently do not have a shared, common mission statement covering their work. I find that problematic. It's my understanding that one deliverable expected to come out of the Movement Roles process is a mission statement that applies to all chapter organizations. I think this is badly needed, and I strongly encourage the MR group to develop such a mission statement as part of its work.

- As noted above, I am concerned about entities that I feel are currently "missing from our table." Our strategy calls for upwards-prioritizing the Global South, and yet we are currently a very Global North-focused movement. The Wikimedia Foundation is located in the Global North; only one in five staff members has ever lived in the Global South; nine out of 10 Board members live in the Global North, and 26 of 30 chapters are in Global North countries. Both the Board of Trustees and the Wikimedia Foundation staff have taken steps in the past two years to open themselves to Global South involvement, and I think those steps have had some good effect. But I believe that to the extent that the chapters aspire to be an important player in the movement, and to have legitimacy as such, then they too need to grapple with this problem. I am not sure what the right answer is. But I do think it involves the global Wikimedia movement making a concerted effort to create room at the table for Global South voices, immediately, and at least for the foreseeable future. Currently we are not doing that: for example, I have been disappointed at our inability to make much room for Global South participants in the MR process itself. One simple idea to mitigate the problem would be to create let's say a council of

Global South Wikimedians, and automatically grant that council the same rights and privileges as chapters representatives -- e.g., give the members access to the internal wiki and mailing list, attendance at the chapters meeting and participation in the Board member selection process, Movement Roles and other similar processes. This wouldn't solve the problem, but it would at least be a short-term hack that would likely serve a mitigation function, and it would be better than the current state.

- I also think that we need to have a mechanism for allowing the easy development of casual, loose movement entities: basically, organizations that are affiliated with Wikimedia, support some particular aspect of our work, are "friends of," etc. I am thinking of entities like the McGill and U Michigan campus associations, and the student ambassador clubs. It should be really easy for people to express affiliation with Wikimedia without needing to get deeply involved in our work. It seems to me that "friends of" status could also work for entities that don't want to become chapters for reasons particular to their cultural or legal context, and/or for chapters that can't or don't want to adhere to the chapter agreement requirements.

Jon, I realize I've written an awful lot here -- sorry! To make it easier for you & the MR group, let me try to recap quickly my recommendations for the group. In no particular order:

- 1) I recommend that the MR group officially ask you (Jon) to share your experiences with other global non-profit networks, and to share your personal views on how the Movement Roles challenges should get resolved, based on your experience.
- 2) I recommend the MR group create high-level guiding principles to govern movement fundraising, and secure agreement for them. I'd be happy to have the group use the ones I wrote above as a starting point, and refine/revise from there.
- 3) I recommend that the MR group craft, and secure agreement for, a mission statement covering all chapter organizations.
- 4) I recommend the MR group consider the question of whether to create, or endorse the creation of, an entity visible and accountable to the global community, charged with the responsibility of investigating major cross-project or cross-language issues such as the decline in active editors, and recommending changes to the community based on its investigations. If the MR group chooses not to act on this recommendation, I would ask how it believes cross-project/cross-language issues should best be resolved: whose responsibility is resolution, and what is the mechanism for achieving it.
- 5) I recommend the MR group consider the question of whether to create, or endorse the creation of, a global group charged with responsibility for overseeing and assessing chapter performance, with the authority to recommend to the Wikimedia Foundation Board of Trustees revocation of chapter status and/or sanctions against chapters. If the MR group chooses not to act on this recommendation, I would ask how it believes chapter performance should be monitored: whose responsibility is it to monitor, and whose responsibility to sanction where necessary.
- 6) I recommend the MR group consider the question of whether to create, or endorse the creation of, a temporary council of Global South Wikimedians, and automatically grant that council the same rights and privileges as chapters representatives -- e.g., give the members access to the internal wiki and mailing list, attendance at the chapters meeting and participation in the Board member selection process, Movement Roles and other similar processes. This wouldn't solve our problem, which is a general movement-wide lack of Global South participation, but it would at least be a short-term mitigating hack, and better than nothing. If the MR group ends up not choosing to do this, I would then ask how it believes Global South voices should be represented at our movement tables, and who is responsible for making it happen.

7) I recommend that the MR group recommend the establishment of a “friends of” type status to make it really easy for people to express affiliation with Wikimedia without needing to get deeply involved in it. MR should create a mission statement for these groups, that makes it clear how they differ from the chapters.

8) I recommend that the MR group release, as part of its final work, a statement reaffirming the mission of the Wikimedia movement, and calling upon all players to work together harmoniously and productively in pursuit of our common goals. I am sometimes baffled by the infighting and hostility expressed by movement players: I think it would be great for this process to remind everyone that we're on the same team, and here for the same reason :-)