

Good enough is perfect

A Wikimedia playbook for collective deliberation

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Editors

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We'd also like to thank all of those who made the Wikimedia Summit 2024 possible, organisers, funders and participants alike.

We have been using methods and tools developed by other designers and facilitators throughout. Wherever possible we have linked to the sources of these methods.

Foreword from Wikimedia Deutschland

In early 2023, Wikimedia Deutschland embarked on a journey to design an international event that would bring the Wikimedia Movement closer to its strategic goal of ensuring equity in decision-making. After seven years of strategy conversations, we asked ourselves: How can we re-energise discussions about governance? The challenge was to create a healthy space to address tough topics such as power and money, and ideally, make it a fun and empowering experience for participants.

To tackle this task, we hired a facilitation team from the Movement Ecology Collective to work with our program team. Together, we designed the Wikimedia Summit as a platform for Wikimedia representatives to deliberate and agree on a set of statements about our movement's future governance. Despite the doubts we had and the challenges we met along the way, the success of the Wikimedia Summit exceeded our expectations. It was incredible to see the theoretical design translating effectively into practice and participants embracing the structured approach.

With this playbook, we aim to share the lessons we learned and inspire others to create similar processes based on their needs. We believe it can serve as a guide for organisations and groups with multiple stakeholders facing similar challenges. There is strength in learning from each other's successes and failures.

Here it is; enjoy reading! We would love to hear your stories of using (parts of) this playbook in your own work. Please share your thoughts and questions with us and forward it to your peers and friends – it's free.

Nicole Ebber, Director Governance and Movement Relations

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Overview

This playbook offers a how-to guide to designing and facilitating a **process for collective deliberation** – for a group to discuss, assess and decide upon their collective position on a strategic or governance proposition.

We have developed the process for the [Wikimedia Summit 2024 \(WMS24\)](#), where the participants were able to find a strong collective position on the Wikimedia Movement Charter Draft.

The process consists of 15 steps spanning a three-day in-person event, from **gathering feedback** on the initial proposition to **developing proposals** on how to adapt and improve it and to **making a collective decision** about these proposals.

The process focuses on

- **participation**: empowering everyone to contribute
- **learning**: constantly adapting to the reality “on the ground”
- **productivity**: keeping momentum from gathering input to deciding on outputs
- **convergence**: enabling the emergence of a strong shared position

When adopting the process, **adapting** it is key: to deliver the intended outcomes, it needs to be tailored to the group who’s using it, its goals and its needs. This playbook helps asking the right questions and finding practical answers.

It is divided into four sections which can be read in order or separately, depending on what you’re most interested in – **key learnings**, **setup**, **process**, and **tools**. Each section is illustrated with examples from WMS24.

Please **get in touch** with any feedback on the playbook, your experiences with using and adapting the process, and your ideas for collaborations at hello@movementecology.org.uk!



Introduction

This playbook offers a how-to guide to adapting and facilitating a process for collective deliberation.

What is the process for?

It's a process for a group to discuss, assess and decide upon their collective position on a specific topic.

We designed it for a large group (more than 50 people) coming together to:

- collect feedback on a strategic or governance proposition, e.g. a policy, manifesto, campaign or, as in our case, constitution draft
- make sense of and deliberate on the collected feedback
- develop proposals on how to adapt and improve the proposition
- determine which of these proposals find the support of the whole group

We have applied the process at the Wikimedia Summit 2024, where the participating Wikimedia affiliate representatives were able to find a strong collective position on the Wikimedia Movement Charter Draft.

We believe the process can be adapted to different scenarios, e.g. one where the group itself develops and decides upon a strategic or governance proposition. We would be very happy to collaborate on such an adaptation.

In any scenario, the process as described here is not a blueprint to be implemented without modifications, but a template to be adapted. For this, we strongly recommend developing a deep understanding of the group, its needs and its goals first.

The process runs better if there is ...

- a shared purpose amongst the participants
- enough existing relationships between them to create a friendly atmosphere
- a culture of collaboration
- potential for new topics, questions and positions to emerge

It may get difficult if there is ...

- fundamental political conflict between decision makers
- lack of buy-in and support from important stakeholders
- not enough time to go through the steps of the process properly
- no shared physical space for participants
- not enough rooms/space to host all parallel sessions
- no technical infrastructure to support the process
- no dedicated logistics team to provide the logistical backbone

Case Study: Wikimedia Summit 2024 (WMS24)

What: A three-day working conference

Who: ~170 Wikimedians – 140 affiliate representatives of the Wikimedia movement, 25 Wikimedia Foundation (WMF) staff and board members and 8 members of the Movement Charter Drafting Committee (MCDC).

Where: Berlin, Germany

When: 19th – 21st April 2024

Why: The Summit had two purposes: First, for representatives of the Wikimedia affiliates to discuss, assess and decide upon their collective position on the Movement Charter draft (referred to here as the *initial proposition*). This position was then fed back to the MCDC so they could adapt the draft to make the Charter more likely to be ratified. (The ratification process was not part of the Summit.) Second, to discuss the future of global affiliate gatherings, because WMS24 was the last one designed and hosted by Wikimedia Deutschland.

Background: Participants were building on a 4-year process of collaboratively developing a strategy from which the agreement to create a charter emerged. Many participants had attended previous summits (and other Wikimedia events) which meant they had strong community ties.

Organisational bodies: The Summit was organised by a program and logistics team consisting of Wikimedia Deutschland (WMDE) staff, and an external design and facilitation team, the Movement Ecology Collective. Oversight was provided by a steering committee consisting of Wikimedia Deutschland staff, Wikimedia Foundation staff, the Board Chairs of both organisations, and representatives from the MCDC. Funding came from WMF and WMDE.

Political buy-in and support: Key stakeholders (WMF, MCDC, WMDE) were supportive of the premise of the process, and had signalled willingness to go along with it and accept its



Photo credit: Jason Krüger

outcomes. The design and facilitation were new to the Summit and had to build trust with stakeholders outside the program team in the run-up to and during the Summit.

Political tensions: Like in every larger ecosystem, there were some tensions between stakeholders, but there was no political conflict between the gathered affiliates, i.e. the decision makers in the process. This enabled it to run without major disruptions.

How should you use this playbook?

Use and misuse

The playbook is intended to serve as a *guide* for facilitating a large-scale deliberation process that is adapted to a specific audience, purpose and situation. Use it for inspiration, guidance and as a reference.

It is *not* intended as a *blueprint* that can be implemented regardless of the specific context, so think carefully about how to apply our recommendations, where to adapt them, and how to best serve the needs of the community you're working with.

Structure

The playbook is divided into four sections, which can be read in order or separately, depending on what you're most interested in:

- **Key Learnings** What we learned designing and running the process
- **Setup** How to adapt and set up the process and what's needed for it
- **Process** How the process is designed and what its individual steps are
- **Tools** Individual methods and formats used throughout the process

Throughout the playbook, there are text boxes describing experiences with the process at WMS24.

Key Learnings

What we learned designing and running the process.

1. Establish a clear purpose: At the start of the design process, agree purpose and desired outcomes for your run of the process explicitly with those with authority (e.g. a steering committee). Also, share purpose and desired outcomes as early as possible with all participants. The purpose of complex events can easily drift when stakeholders bring many different priorities, concerns and ideas. Having purpose and desired outcomes agreed and written down will be essential to refer back to and keep the design process on track.

2. Understand your audience: It is worth spending a good amount of preparation time learning about what makes your audience tick. What's important to them? What needs do they have? How can their strengths be harnessed? What would they be comfortable with? Gather this information by asking your client and other key stakeholders about their opinions and learnings.

At previous Wikimedia Summits on strategy and governance, the program team had observed a few recurrent behaviours: Participants diverged on topics a lot (e.g. generating alternative ideas, arguing different perspectives), they wanted to finish conversations that they had started, and they preferred to be involved in all discussions, rather than focusing on one specific topic throughout the summit.

To enable agreement on a number of clear, succinct proposals under such conditions, we put a strong focus on convergence (synthesising and making decisions) in our process design. Additionally, we allowed some space for divergence and further exploration. We also included framing around "letting things go" in order to encourage participants to accept that we would not have time to complete all conversations.

3. Engage key stakeholders early on: Establish direct contact with key stakeholders as soon as possible to understand their perspectives and any concerns they have. This will build trust, reduce the likelihood of miscommunication and reduce the need for compromise in the design of the event, thereby improving the overall quality of the process. If you receive briefings about stakeholders, use your own judgement: They will contain valuable information about your audience, but don't take them as gospel, and keep in mind that stakeholders may be more open to new things if they come from a new party (e.g. the facilitation team) who are seen as neutral.

4. **Define your constraints:** Gain clarity on the constraints that are present within your context, and recognise what trade-offs you have to make. How much time do you have? What is the participants' level of pre-existing knowledge on the issue? Are there communication barriers (e.g. language, conflicts)? Are participants used to participatory decision making, or are they new to this kind of process? Without awareness of the constraints, you may waste time designing processes that will not work in your specific context with this particular audience.
5. **Think thoroughly about framing and work culture:** Framing is crucial to create the desired atmosphere and to mitigate risks that may derail the process. How do you explain the process and its principles to participants? What strengths do you want to embolden? Where do you need to create frames to help participants overcome hurdles? Where do participants need reassurance, and where do they need “a little push”? What do you need to create a constructive working space?



The Summit had a crucial topic: a system for the future global governance of the Wikimedia movement. Inevitably, this was fertile ground for high hopes, fears and tensions. In order to create a positive atmosphere where people felt safe and seen, we baked gratitude into the Summit's culture from the very start. We invited participants to express appreciation for the Movement Charter draft (the initial governance proposition) and those who created it. Showing gratitude helped to increase the willingness and ability to collaborate and to give and receive constructive feedback.

Since this Summit was fast paced and involved a lot of decision making about the proposals developed, it required Wikimedians to not get stuck in perfectionism. We made “Good enough is perfect” the Summit's *de facto* motto which helped us acknowledge and work within the time constraints. We also worked to alleviate fears that arose in the process by showing participants and stakeholders what was done to address their concerns and checking if there were any further requests.

- 6. Build trust:** The trust and quality of relationships you build within the core organising team will emanate out into the event. Spend time at the start of the project getting to know each other and create team agreements, including how you will raise tensions with each other. Encourage each other to raise an issue if anyone feels the agreements are not being followed. We recommend meeting in person early on in the process, which of course requires a budget. Building relationships with stakeholders early on equally increases trust between you and them and will enable better and more effective collaboration on process design and implementation.
- 7. Provide clear roles:** Important stakeholders may unintentionally exert undue influence the process; for example, participants may see them as a knowledgeable authority and may defer to them in breakout groups. This can hinder participants' ability to explore their own opinions and ideas. Define clear roles for all stakeholder groups before the event and get their agreement to these definitions. Stakeholders will most likely appreciate having clarity on what they can do to support the process.
- 8. Provide clear rules:** To mitigate undue power and influence, you will also need clear rules. Examples are not permitting certain stakeholders in specific parts of the process and limiting the number of members of a specific group per breakout session (e.g. no more than 20% of the breakout group). Facilitators need to keep breakout groups on task and not let participants question the purpose of the session or process. These measures will only be feasible if there's enough trust in and authority of the design and facilitation team to convince participants that these rules are for the good of the collective.
- 9. Use accurate terms:** In the design of the process, use the terms that most accurately represent the intended meaning, e.g. if participants are giving feedback, call it feedback. This may seem obvious, but when trying to navigate stakeholder interests, it's easy to get waylaid. If there are requests to use specific euphemistic terms, this is an indication that there is an underlying tension (e.g. lack of trust or political conflict) that needs to be addressed. Changing terms is a superficial fix that will prevent you from addressing the real problem, leading to confusion and delay.

In the early days of designing WMS24, we shied away from tension by avoiding certain terms that made stakeholders uncomfortable, e.g. "feedback" or "proposal". Instead, we used what was considered more "neutral" terms. However, this meant that the instructions given to participants were not as clear and accurate as they could have been; this set the process back because participants had to spend more time trying to figure out what was meant.

10. Use skilled facilitators: We highly recommend hiring skilled facilitators to manage breakout rooms, keep groups on target, support their work and steer them when necessary while staying neutral in questions of content. These aren't tasks that participants themselves can do, and even well-meaning but untrained facilitators will struggle with them in a complex process like this. Working with skilled facilitators builds capacity, resilience and adaptability into the process. The breakout facilitators need to be coordinated by a lead facilitation team.



Photo credit: Jason Krüger (left) (right)

At WMS24, we hired skilled facilitators for the 10 breakout rooms. We (mostly) used external facilitators, who were able to facilitate as strictly as necessary without having to fear they were compromising future working relationships.



11. Allow for emergence: Try as you might, things will always go different to what you expect. Allowing for adjustments and new ideas to emerge, instead of fighting to stay rigid, will improve participants' experience and result quality. Having empowered and autonomous facilitators enables adaptation on the ground. Also allow enough slack in the lead facilitation team so they are able to respond to issues as they arise. This can include supporting the breakout room facilitators, managing stakeholder involvement behind the scenes or simply getting more facilitation materials (e.g. sticky notes).

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Setup

What you need to design and run
(your version of) the process.

Process design

There are a few simple ground rules:

- Take plenty of **time** to adapt the process. How much will depend on the complexity of the event, the goal, the stakeholders' needs, etc.
- Talk to all **stakeholders** involved to make sure the process meets their needs and to understand their organisational culture.
- Take an **iterative** approach, i.e. design in multiple drafts and collect and incorporate feedback after each iteration.

When we were hired to design and facilitate WMS24, we started a process of almost five months and over 500 hours of work to design the process, not including the program team's time. However, we obviously didn't have this playbook at our disposal!

The hours included a lot of time understanding the governance structure and culture of the Wikimedia movement as part of understanding our audience.

Organising topics and groups

To enable close-knit and focused collaboration, the process organises participants around topics, on which they work in smaller breakout groups. These topics need to be defined beforehand, taking into account the perspectives of all participants and stakeholders.

Ideally the topics emerge from the proposition that participants deliberate on. Subsequently, the work on the proposals to improve and finalise the proposition will follow its content structure.

Key criteria to arrive at good topics and topic groups are:

- **Coverage:** Is the whole initial proposition covered by the topics?
- **Independence:** Is it possible to discuss the topics independently from each other?
- **Group size and composition:** Are the groups working on the topics of roughly equal size and diverse enough composition? Have participants been assigned to groups according to their interests?

At WMS24, we worked with the program team to understand what topics make most sense to them and the participants. For this, the program team analysed the charter draft and came up with a set of proposed topics that were covered in the draft. They then iterated this organisation in dialogue with all stakeholders (the MCDC, WMF staff and the Summit steering committee) until we had a topical structure that worked for all of them.

When assigning participants to topics, the program team took their interests into account as well as making sure stakeholder groups and specific backgrounds were represented fairly in the groups.

In designing the groups, we were also constrained by the number of breakout rooms that were available at the venue.

Initial proposition and participants' feedback

The initial strategic or governance proposition participants will be deliberating on needs to be presented in a way that aids understanding and enables easy feedback collection. The topics are an ideal starting place for that as well: The proposition can be broken down into topical "chunks" that are presented to the participants in an easy-to-digest format, e.g. on large posters, where they can leave feedback on sticky notes.

Facilitation

There are two different facilitation teams in this process with different responsibilities:

Lead Facilitation Team

- Small team, 2-5 people
- Holding the overall process
- Hosting the event, i.e. facilitating the plenary space
- Coordinating and supporting the support facilitation team
- Managing stakeholders

Support Facilitation Team

- Skilled facilitators (ideally) from outside the organisation/movement
- Facilitators are assigned to breakout groups so they can build a relationship and trust over the course of the process
- Facilitators act autonomously within their groups, i.e. they are empowered to make decisions and adapt the process where needed
- Their main responsibilities are to ensure equal participation in the process, help groups work productively and keep them engaged in the process
- Support through the lead facilitation team is essential and can include:
 - ↳ Briefing, 1-2 weeks beforehand (~2h)
 - ↳ [Facilitator Handbook](#)
 - ↳ Longer briefing on the first day (~1.5h)
 - ↳ Regular short meetings (ideally after each session)
 - ↳ End-of-day debrief and looking forward to the next day
 - ↳ Group chat (e.g. on Signal or Telegram) where they can ask for assistance (technical, materials, process and content); members of the chat should be: Lead facilitators; Support facilitators; Tech support; Key stakeholders to coordinate with (if there is enough trust)



At the Wikimedia Summit we built trust with the support facilitators by organising pre-event briefings to give them contextual information, run through the programme, and create a space to ask questions. We also empowered them to use their own judgement to facilitate the process. This created an adaptable network of facilitators able to handle many issues by themselves, which relieved some pressure from the lead facilitation team.

During WMS24, we had regular meetings before and after the day's agenda started and finished, and during the breaks. This provided a space for us to remind the facilitators of what they would do next; this meant the briefings were broken down into chunks where they only got the information they needed as they needed it. It also enabled the facilitators to share how their assigned group was doing and request advice, tech support, or materials.

Photo credit: Jason Krüger

Technical infrastructure

- Communication and collaboration for facilitators:
 - ↳ Shared agenda document (e.g. via [SessionLab](#))
 - ↳ Facilitator group chat (e.g. on Signal or Telegram)
 - ↳ [Presentation](#) to guide through the process
 - ↳ Laptops for all facilitators in order to present in their breakout room
- Plenary room equipped with:
 - ↳ Main stage
 - ↳ Space for [Spectrum Lines](#) exercise
 - ↳ Large screen to show the guiding presentation
 - ↳ [Presentation](#) (with notes for event host)
 - ↳ Seating for all participants
 - ↳ Boards to present the initial proposition and the proposals developed throughout the process
- Breakout rooms for smaller groups equipped with:
 - ↳ Projector or screen to show the guiding presentation
 - ↳ [Presentation](#) (with notes for Facilitators)
 - ↳ Adapters for connecting facilitators' laptops
 - ↳ Pin boards and templates
 - ↳ Sticky notes and marker pens
- If needed: translation and captioning services
- [Online Survey](#) for the final voting

The technical infrastructure and assistance team at WMS24 was very supportive. Some rooms were equipped with [Wordly](#) (a real-time translation software); this enabled participants in the breakout rooms to better understand each other and express themselves in their own language. The tech support team was continually on hand to respond to any challenges that arose. They also took care of the audio-visual tech in the plenary room.

Also, we had a group chat with the tech support team where facilitators could directly tag them and they would go straight to their room to offer support.

Documentation

Depending on the needs of participants and stakeholders, you will need to document the process during and after the event in specific ways. Follow these steps to design an adequate documentation system:

1. Identify what/if documentation is needed, who it is for, and how it is going to be used and shared (e.g. narrative report, Wikimedia meta page)
2. Map what information will be gathered, and how (e.g. video recording, note taking, photos of outputs)
3. Allocate resources: human, digital or physical infrastructure, space, and time.
4. During the event, monitor the data collection through constant communication (e.g. team meetings, chat groups)

For WMS24, an external reporter was hired to plan and produce the documentation of the event's process and outcomes. The intentions were to allow Wikimedians to focus on the discussions rather than their documentation, and to promote transparency, accountability and shared learning.

The reporter worked closely with the lead facilitation team in order to identify what the key data outputs from each session would be, and design the means for collecting them. This involved training support facilitators in guiding data collection within breakout rooms.

Multiple documentation strategies were used during the Summit, sometimes in parallel:

- Note taking and summarising speeches (in plenary), presentations and comments made by participants.
- Participants who volunteered to be reporters within breakout sessions were responsible for sharing their notes with the event reporter (e.g. text or photo). Sometimes, digital reporting templates were given in advance (e.g. etherpad templates for Open Space reporting).
- Outputs created during or for the summit: photos of flip charts notes and post-its, presentation slides, and other resource documents.

Other forms of support

- Help Desk for participants to seek help regarding the topics they work on
- Quiet room where participants can retreat to if they needed it

Logistics

This playbook does not cover the logistics of running an event around the process described here. However, needless to say, taking care of people's needs and supporting them to feel comfortable makes a big difference to the atmosphere of the event. You will need to think carefully about the venue, catering, accommodation, transport, etc. Please see [Logistics of WMS24](#) for more information.

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Process

Our “reference implementation” of the process in detail –
a three-day program, broken up into 15 individual steps.

Overview

Design principles

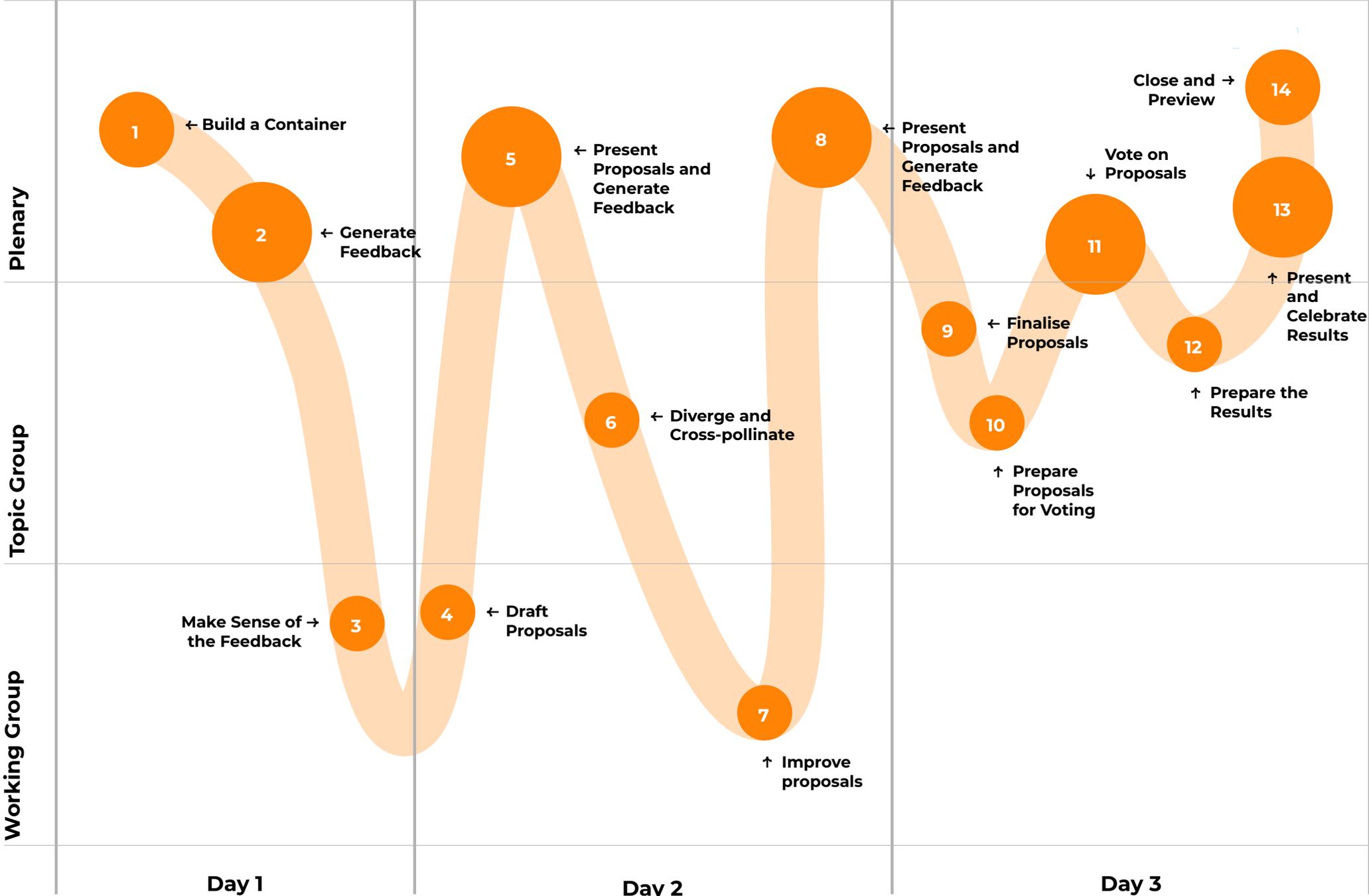
To achieve the desired outcomes within the constraints of group size and time, and expecting divergence and striving for comprehensiveness, we adopted the following design principles:

- **Clarity and structure:** Be very clear about the *how* and *why* of the process (i.e. what we're asking participants to do) at all times
- **Emergence and adaptation:** Make the process adaptable to what actually happens on the ground
- **Ease of letting go:** Help people manage their attachment to their ideas and proposals
- **Iterative proposal development:** Make it clear there will be structured time to improve on interim results so things don't need to be perfect
- **Diverge and converge:** Distinguish collecting a wide range of inputs from narrowing down and deciding to keep things moving
- **Guiding principles:** Don't overwhelm participants with process, but give them direction and let them play it out themselves along the lines of the principles
- **Breathing space:** Create spaciousness for people to discuss and go deep on things so they don't feel rushed to make decisions and agree
- **Celebrations:** Focus not only on critique and improvement but also on what has already been accomplished

Structure

The process works on three different levels to accommodate the need for information sharing and collective decision making as well as close-knit and focused collaboration. These three levels are:

	Created	Members	Purpose
Plenary (P)	by default	all participants (> 50) + Master of Ceremony (MC)	generate feedback on proposition and proposals; make final decisions
Topic Groups (TG)	beforehand around predefined topics	15–25 participants + 1 assigned facilitator	organise and process feedback from the Plenary; iterate on proposals coming from Working Groups
Working Groups (WG)	within the Topic Groups during the process around specific aspects of the topics	4–8 participants (self-organised)	develop and improve proposals; process feedback from the Topic Group



Participant's Journey

This is how the process runs on these three levels over the course of three days:

Day 1

- 1. Build a Container**
Welcome everyone to the event, create a sense of togetherness and set the tone for how to relate to each other
- 2. Generate Feedback**
All participants provide broad feedback on the strategic or governance proposition under deliberation
- 3. Make Sense of the Feedback**
Participants make sense of the feedback without the pressure to converge and make agreements

Day 2

- 4. Draft Proposals**
Draft initial proposals how to improve the proposition and prepare them for gathering feedback
- 5. Present Proposals and Generate Feedback**
Generate feedback on the initial proposals
- 6. Diverge and Cross-pollinate**
Identify synergies, contradictions and redundancies by visiting a different group and bringing in-person feedback
- 7. Improve proposals**
Integrate feedback into proposals and prepare them to be presented again
- 8. Present Proposals and Generate Feedback**
Generate feedback on the improved proposals

Day 3

- 9. Finalise Proposals**
Finalise the proposals for the participants to vote on
- 10. Prepare Proposals for Voting**
Prepare the finalised proposals for the participants to vote on
- 11. Vote on Proposals**
All participants indicate support for or opposition to the final proposals
- 12. Prepare the Results**
Process the voting results in order to present them to the participants
- 13. Present and Celebrate Results**
Share the voting results with participants on-site and with the wider community
- 14. Close and Preview**
Provide closure and inform participants about how the process will be followed up

After the event

- 15. Reflect & Learn**
Reflect on experiences and feedback from participants and stakeholders in order to derive lessons learned



At WMS24, we had two parallel tracks for some of the sessions and three parallel tracks for one session. The three tracks were:

Movement Governance: Iteratively providing feedback and creating proposals to improve the initial governance proposition, i.e. the Wikimedia Movement Charter.

Future of Global Affiliate Gatherings: Exploring the future of affiliate events since WMS24 was the last Summit organised and run by Wikimedia Deutschland.

Open Space: A space for participants to suggest topics they'd like to discuss and hold them along with a support team facilitator. Participants were free to attend whichever session they wanted.

This playbook only covers the movement governance track.

IDOART Framework

To describe the individual steps of the process, we are using the IDOART framework, which is a simple and effective tool to plan meetings, workshops and trainings. It helps you get clear on the essentials without getting sidetracked.

IDOART is an acronym that stands for:

- **I**ntention: Why are we here? What is the purpose? Why are we doing this?
- **D**esired **O**utcomes: What do we want to achieve at the end of the session?
- **A**genda: Which points are we going through and in which order?
- **R**oles: What roles do the people attending have (e.g. facilitator, participants, timekeeper)?
- **T**ime: What is the time needed for this session?

The framework works as a fractal: an IDOART can be made as an overview of a three day event. Each day gets its own IDOART, specifying the intention, outcomes and agenda for that day. And then each session within the day can have its own IDOART.

On the session level, you can add “**M**aterials” to the IDOART, giving you the acronym I DO ART, MATE. Summing up your “Mates” for all sessions will give you an overview of the total amount of materials needed for the whole process.

- **M**aterials: What materials are needed for this session?

Timing Note: All timings below are approximates, you will need to adapt them to your own context. There should be extended breaks (~30 minutes) to allow participants to decompress, mingle and to take care of their physical needs. We suggest 1.5 hours for lunch. We recommend allowing at least 30 minutes of buffer at the end of each day.

1. Build a Container

Level

Plenary

Intention

Welcome everyone to the event, create a sense of togetherness and set the tone for how to relate to each other

Desired Outcomes

- After this session, participants
- feel welcomed and connected to each other and the bigger context of the event
 - are reassured that they are not alone in their challenges and excited about the opportunities ahead
 - know the people who designed the event and who will guide them through it
 - have an overview of the process and understand its overall ethos and how it will work
 - can let go of the need to be part of every discussion, every step of the way
 - are familiar with the practical side of the event

Agenda

- **Introduction** [60 minutes]
 - ↳ Words of welcome by the event host and/or an organisation leader
 - ↳ Introduction of the facilitation team
 - ↳ Connection exercise
 - ↳ External keynote speaker
 - ↳ Overview of the wider process: Include relevant information about how the initial proposition was created, by whom, and how it fits into the wider process it is a part of (e.g. a strategy development initiative)
 - ↳ If needed, framing by relevant stakeholders
- **Connection exercise: Spectrum lines** [15 minutes]
- **Framing** [15 minutes]
 - ↳ Integrate what you know (or the client has briefed you on) about your audience into the framing
 - ↳ **Principles** for the participants to follow
 - ↳ Practise collective governance
 - ↳ Celebrate and contribute
 - ↳ Think about the larger whole
 - ↳ Trust collective intelligence
 - ↳ Trust the process
 - ↳ Letting go exercise
- **Overview of the process** [10 minutes]
 - ↳ Provide an overview of the whole process
 - ↳ Situate it in the wider process
 - ↳ Use visualisations to make it easier to understand
- **Housekeeping** [10 minutes]
 - ↳ Give an overview of location logistics (fire escapes, toilets etc.)
 - ↳ Announce important timings
 - ↳ Point to additional support (help desk, event team etc.)

Roles

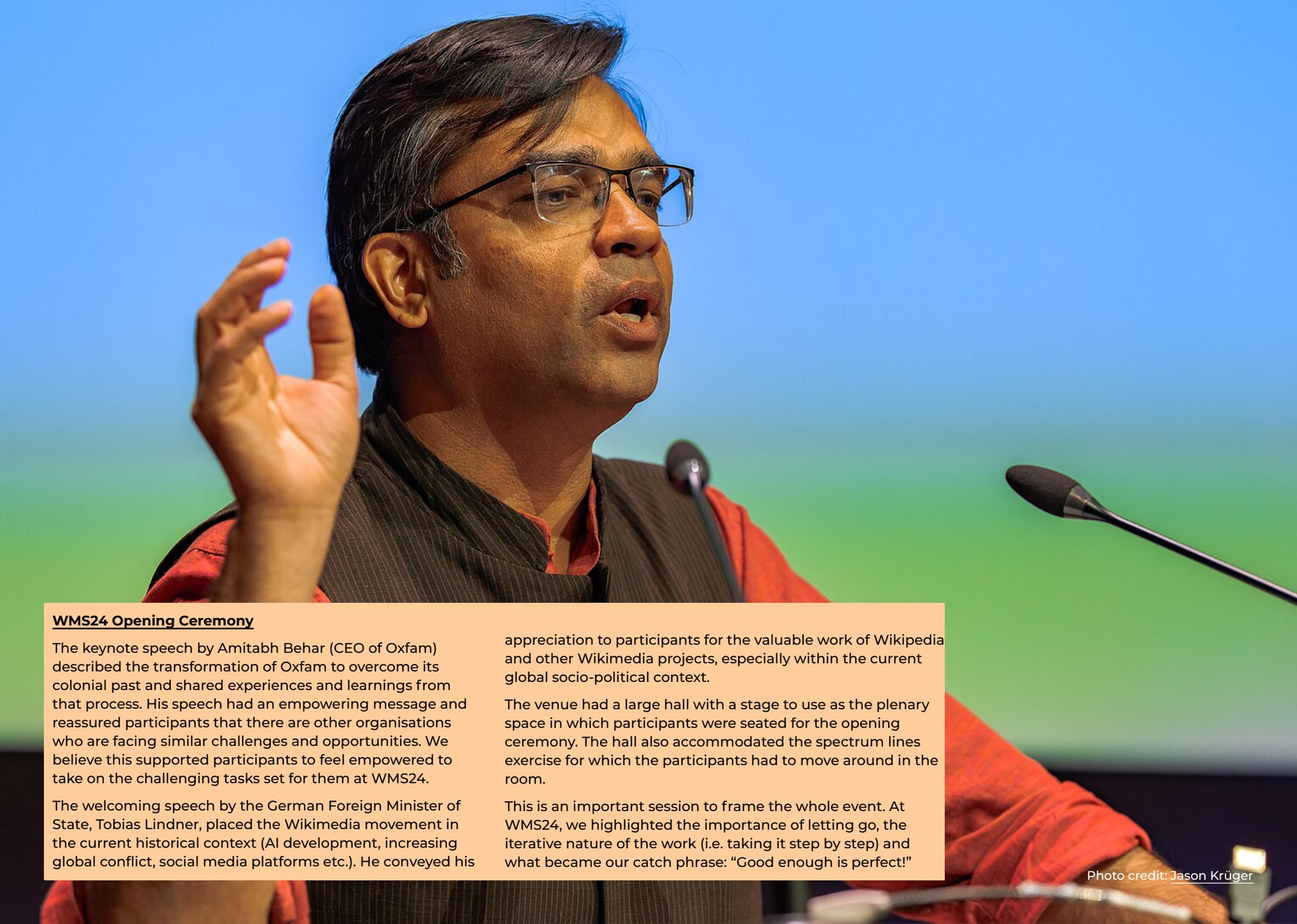
- Event host and/or organisation leader: Welcomes participants and sets relevant context
- Master of Ceremony (MC): Holds the process from the main stage, provides framing and introduces different speakers and contributors
- Keynote speaker: Provides participants with an interesting external perspective on the gathering
- Stakeholder representatives: Frame the process from their perspective and give additional context

Time

110 minutes

Materials

- Big hall with a main stage
- Projector or screen
- Microphone(s) and PA system
- Chairs for all participants



WMS24 Opening Ceremony

The keynote speech by Amitabh Behar (CEO of Oxfam) described the transformation of Oxfam to overcome its colonial past and shared experiences and learnings from that process. His speech had an empowering message and reassured participants that there are other organisations who are facing similar challenges and opportunities. We believe this supported participants to feel empowered to take on the challenging tasks set for them at WMS24.

The welcoming speech by the German Foreign Minister of State, Tobias Lindner, placed the Wikimedia movement in the current historical context (AI development, increasing global conflict, social media platforms etc.). He conveyed his

appreciation to participants for the valuable work of Wikipedia and other Wikimedia projects, especially within the current global socio-political context.

The venue had a large hall with a stage to use as the plenary space in which participants were seated for the opening ceremony. The hall also accommodated the spectrum lines exercise for which the participants had to move around in the room.

This is an important session to frame the whole event. At WMS24, we highlighted the importance of letting go, the iterative nature of the work (i.e. taking it step by step) and what became our catch phrase: "Good enough is perfect!"

2. Generate Feedback

Level

Plenary

Intention

Generate broad feedback on the initial proposition

Desired Outcomes

- Familiarity with the initial proposition
- A wide range of individual points of feedback on all parts of the initial proposition

Agenda

→ **Instructions** [10 minutes]

- ↳ Ask the creators of the initial proposition to stand up and receive a round of applause
- ↳ Introduce Gallery Walk format
- ↳ Explain how to give useful feedback; introduce different types of feedback, e.g.
 - ↳ Celebration: What do you appreciate about the proposition?
 - ↳ Improvement: What could be improved about the proposition?
 - ↳ Deal-breaker: What would prevent you from ratifying the proposition?
 - ↳ Further idea: Any ideas that go beyond the scope of the proposition?
- ↳ Explain how to use sticky notes
 - ↳ What does a well written sticky note look like?
 - ↳ Inform participants about the maximum number of sticky notes per person
- ↳ Hand out sticky notes with different colours for the different feedback types

→ **Walk and give feedback** [30 minutes]

- ↳ Participants read the posters derived from the initial proposition
- ↳ Participants put sticky notes with feedback next to the posters the feedback refers to
- ↳ Let participants know when they're halfway through

→ **Wrap up** [5 minutes]

- ↳ Ask participants to finish and move to the next session

Roles

- MC: Guides participants through this part of the process
- Logistical support: Hands out sticky notes and markers to participants

Time

45 minutes

Materials

- Poster version(s) of the initial proposition(s)
- Pin boards to hang them up and collect sticky notes
- Sticky notes in different colours
- Marker pens

Gallery Walk I

At WMS24, we started with the Movement Charter which had been drafted by the MCDC as our initial proposition. We split that document up into eight topics.

We used a Gallery Walk to invite feedback from Summit participants on the Movement Charter. This was kicked off with the MCDC standing up and receiving a round of applause for their contribution (to show appreciation for their hard work).

Then we explained how participants could give feedback on the Charter. We had eight A0 pin boards with the eight topics of the Charter on which participants could leave feedback using sticky notes.

Some of the key stakeholders were worried that participants would heavily critique the initial proposition, leading to a negative and adversarial atmosphere. Along with the framing provided by the MC in the plenary, we weaved gratitude and celebration into all steps of the process, by including “celebration” as one of the four categories that participants filled in on the template poster when providing their feedback.



Photo credit: [Jason Krüger](#)

3. Make Sense of the Feedback

Levels

Topic Group, Working Group

Intention

Make sense of the feedback without the pressure to converge and make agreements

Desired Outcomes

- A shared understanding of the feedback
- Working groups that make sense to the participants
- First ideas and questions to take forward

Agenda

- **Introduction** (Topic Group) [10 minutes]
 - ↳ Ask participants to introduce themselves. They can share their name, pronouns (explain what this is and why it's important), where they're from, and how they are feeling about getting started with the work
 - ↳ Give an overview of the session by reading out the Intention and Desired Outcomes
 - ↳ Remind participants of the principles (see [Build a Container](#))
 - ↳ Describe the steps of this session
- **Harvest feedback** (Topic Group) [10 minutes]
 - ↳ Present the feedback on the group's topic from the Plenary and take clarifying questions
- **Cluster feedback** (Topic Group) [15 minutes]
 - ↳ [Cluster](#) the feedback
 - ↳ Ask participants to prioritise the clusters with [dot voting](#)
- **Form working groups** (Topic Group) [5 minutes]
 - ↳ Create working groups (ideally 4–7 members each) for the highest-voted clusters
 - ↳ Make materials available to groups
 - ↳ Let groups choose a scribe amongst themselves
- **Discuss feedback** (WG) [25 minutes]
 - ↳ Let working groups discuss the feedback and their thoughts and suggestions
 - ↳ Ask the scribe to capture any emerging ideas or questions on flipchart paper
 - ↳ Ask the working group to come up with a name for their group so that their template posters don't get mixed up and for ease of documentation their outputs at various stages of the process
- **Prioritise emergent aspects** (WG) [5 minutes]
 - ↳ Let working groups [dot vote](#) on the most important emerging ideas that have been noted down
- **Report back** (Topic Group) [10 minutes]
 - ↳ Ask working groups to give a short report on their findings (no discussion)

Roles

- Facilitator: Holds the session on the Topic Group level and divides their attention amongst the WGs when the group splits up.
- Scribe (WG): Once the WGs are formed, a scribe is chosen amongst members of a WG. The scribe will note down any emerging ideas or questions on flipchart paper

Time

80 minutes

Materials

- Output from the [Generate Feedback session](#)
- Pin board or wallspace
- Markers
- Flipchart



At WMS24, participants collected feedback on the Movement Charter, the initial governance proposition, in the first Gallery Walk. This feedback was the input for the sense-making.

We used pin boards to roll the feedback into the different Topic Group rooms where it was clustered and discussed in smaller, self-facilitated working groups.

Additionally, this is the first time participants are in the room together, so it's important to build a working relationship with each other. Start the first breakout session with a go-round where the participants can introduce themselves.

Photo credit: Jason Krüger (top left) (top right) (bottom)

4. Draft Proposals

Levels

Topic Group, Working Group

Intention

Draft initial proposals and prepare them for gathering feedback

Desired Outcomes

- Confidence in drafting proposals iteratively
- Initial proposals from each Working Group
- Coherent Topic Group proposal captured in a prepared template

Agenda

- **Instructions** (Topic Group) [10 minutes]
 - ↳ Give an overview of the session by reading out the Intention and Desired Outcomes
 - ↳ Refer back to the last session
 - ↳ Introduce new roles
 - ↳ Proposal Owner: represents the Working Group on the Topic Group level and tracks how their proposal is processed there
 - ↳ Topic Coherer
 - ↳ makes sure the Working Group proposals gel into a coherent Topic Group proposal
 - ↳ represents the Topic Group in the Plenary
 - ↳ Connection Spotter: uses Plenary sessions to spot connections of the Topic Group's work to that of other Topic Groups and reports them back
 - ↳ Describe the steps of this session
 - ↳ Explain the use of templates
 - ↳ The Working Group templates are used in the Working Groups
 - ↳ The Topic Group template is used at the end of the session to merge the Working Group templates into one
- **Draft initial proposals** (Working Group) [25 minutes]
 - ↳ Support Working Group members to draft proposals (one proposal per sticky note) based on their previous discussions. The Scribe puts them on the template.
 - ↳ Ideally max. one proposal per question
 - ↳ Only 1-2 sentences per proposal
 - ↳ Start with celebration
 - ↳ Working Group members choose Proposal Owner from the group to present their proposals in the next step

→

- **Feedback on proposal drafts** (Topic Group) [25 minutes]
 - ↳ Proposal owners share the Working Group proposals and receive feedback from the other Working Groups. Scribes take notes
 - ↳ No discussion! The feedback integration is the Working Group's "reply"
- **Integrate feedback** (Working Group) [15 minutes]
 - ↳ Send participants back into Working Groups to rewrite their proposals based on the feedback
- **Merge proposals and prepare for plenary presentation** (Topic Group) [25 minutes]
 - ↳ Let Topic Group choose a Topic Coherer.
 - ↳ Let Topic Group choose a Connection Spotter
 - ↳ Support the Proposal Owners from each Working Group and the Topic Coherer to
 - ↳ bring the Working Group templates and assemble around the empty Topic Group template
 - ↳ go through the Working Group proposals
 - ↳ check for and merge duplicates
 - ↳ check for and resolve (or at least mark) any contradictions
 - ↳ transfer every discussed output to the Topic Group template

Roles

- **Facilitator:** This session is limited in time, make sure facilitation is tight. Set timers for presentations and feedback.
- **Scribe**
 - ↳ One per Working Group
 - ↳ Captures the proposals on sticky notes (one sticky note per proposal)
- **Proposal Owner:**
 - ↳ One per Working Group
 - ↳ (Re)presents Working Group outputs in the Topic Group
- **Topic Coherer:**
 - ↳ One per Topic Group
 - ↳ Maintains coherence on the topic level
 - ↳ Answers questions from other Topic Groups in the plenary feedback sessions
 - ↳ Joins Coherence Team in the Finalise proposals step
- **Connection Spotter:**
 - ↳ One per Topic group
 - ↳ Looks for connections and contradictions between topics
 - ↳ Joins Coherence Team in the Finalise proposals step

Time

100 minutes

Materials

- Templates (Working Groups and Topic Group)
- Pin boards or wallspace for templates
- Markers
- Large (A5) sticky notes



Topic	Working Group	Notetaker	Gallery Walk 2/3
<p>Global Council: Purpose & Resource</p> <p>Celebration</p>			
<p>COMMUNITY CENTERED DECISION MAKING </p> <p>The need for resources in the GC has been recognised</p> <p>Staff support is <u>Necessary</u></p>	Feedback	<p>Deal-breakers</p> <p>Aligned with the overall purpose the financial independency and autonomy needs to be defined and <u>guaranteed</u>.</p>	Feedback
<p>Improvements</p> <p>Beyond the Charter</p>			
<p>MOVEMENT BUDGET, AFFILIATE BUDGET, GC - BUDGET SHOULD BE RENDERED TRANSPARENTLY, COMPREHENSIBLY AND PARTICIPATORY</p> <p>CLARIFY ROLES + RESPONSIBILITIES OF STAFF + G.C.B TO CREATE INTERNAL ACCOUNTABILITY</p> <p>There is a range of opinions on the hierarchy of the GC and other movement entities.</p>	Feedback	<p>Beyond the Charter</p> <p>TECHNOLOGY AND OPERATIONAL FOCUSED WMF + GOVERNANCE AND PROGRAMS FOCUSED GLOBAL COUNCIL</p> <p>BUDGET TO INCLUDE FREE AND OPEN SOURCE SOFTWARE AND TOOLS DEV FOR GOVERNANCE, TRANSLATIONS, TRAINING...</p> <p>PROTECTION MECHANISM FOR STAFF FROM INTERNAL/EXTERNAL LOBBING</p>	Feedback

After this session, every Topic Group had a template that would look like the one to the right. We used an A0 size template and A5 size sticky notes.

The template only allows for three sticky notes to be inserted per feedback category (i.e. Celebration, Improvements, Deal-breakers, Beyond the Charter). We designed it this way so that the physical limitations of the template forced Working Groups to synthesise their proposals or choose the most important ones.

The “feedback” section is a space for participants to provide feedback in the next plenary session (see [Gallery Walk](#)).

Also have a look at [WMS24 final proposals](#), e.g. “The Global Council must have directly managed staff, which must report directly to the Global Council Board.”

Photo credit: Jason Krüger (left), Mike Peel (right)

5. Present Proposals and Generate Feedback

Level

Plenary

Intention

Generate feedback on the Topic Group proposals to facilitate plenary-level convergence

Desired Outcomes

- Overview and understanding of the proposals prepared in the breakout sessions
- Feedback on all of the proposals in the form of sticky notes

Agenda

→ **Instructions** [10 minutes]

- ↳ Remind people of the [Gallery Walk](#) format
- ↳ Explain that the posters illustrate the proposal created by the Topic Groups
- ↳ Invite the participants to provide their feedback using sticky notes
- ↳ Remind participants how to write legible sticky notes
- ↳ Hand out sticky notes and marker pens

→ **Walk and give feedback** [25 minutes]

- ↳ Participants read Topic Group proposals
- ↳ Participants put sticky notes with feedback next to the proposals
- ↳ Let participants know when they're halfway through

→ **Instructions for next session** [5 minutes]

- ↳ Ask participants to finish and move to the next session
- ↳ Inform participants that they can either stick with their original Topic Group or go to one other Topic Group to bring in-person feedback and have a discussion
- ↳ Remind them that Proposal Owners and Topic Coherers need to stay with their original Topic Group

Roles

- MC: Guides participants through this part of the process
- Topic Coherers: Stay with their Topic Group's templates to explain them to other Topic Groups
- Connection Spotters: Examine other Topic Group's templates to spot any connections or contradictions
- Logistical support: Hands out sticky notes and markers to participants and brings boards with templates and feedback back to the Topic Group rooms

Time

40 minutes

Materials

- Topic Group proposals on their templates
- Pin boards or wallspace to hang the templates
- Markers/Pens suitable for writing on small sticky notes
- Sticky notes



Gallery Walk II

At WMS24, we brought all templates from the Topic Groups into the big hall before this session. That all groups had completed their templates meant that the process was working as intended – the first real test of our convergence machine was a success!

Photo credit: Jason Krüger (top), (bottom)

6. Diverge and Cross-pollinate

Levels

Topic Group, Working Group

Intention

Identify synergies, contradictions and redundancies by visiting a different Topic Group and bringing in-person feedback

Desired Outcomes

- A sense of what other groups are working on
- Perspectives shared directly between members of different groups
- An overview of synergies, contradictions and redundancies across groups

Agenda

- **Instructions** (Topic Group) [10 minutes]
 - ↳ Welcome newcomers from other Topic Groups
- **Harvest feedback** (Topic Group) [20 minutes]
 - ↳ Present feedback from the previous session
 - ↳ Invite newcomers to share any additional feedback
 - ↳ Invite Connection Spotter to highlight connections and contradictions
 - ↳ Collect additional information on sticky notes and place them next to the proposal it's referring to
 - ↳ Assign all sticky notes to existing Working Groups, represented by Proposal Owners
 - ↳ Send participants into Working Groups and let newcomers choose which one to join
- **Discuss feedback** (Working Group) [30 minutes]
 - ↳ Scribe reads out feedback from sticky notes
 - ↳ Working Group discusses feedback
 - ↳ Newcomers represent their perspective
 - ↳ Working Groups hear the newcomers' perspectives and discuss with them
 - ↳ No need to reach convergence or agreement, no decisions made at this point; ownership stays with the original Working Group
 - ↳ Scribe takes notes of the discussion
- **Distil insights** (Working Group) [10 minutes]
 - ↳ Topic Owner leads a brief exercise to extract key insights
 - ↳ Guiding questions:
 - ↳ What did we spend most of the discussion time talking about?
 - ↳ What specific suggestions or requests were shared?
 - ↳ What did the group already converge or agree on?
 - ↳ Scribe lists proposed modifications of the initial outputs on flipchart paper
- **Return to original Topic Group** [During break time]
 - ↳ Newcomers return to their original Topic Group for the next session

Roles

- Facilitator: Welcomes newcomers and support them to bring their perspectives, either at Topic Group level, or to a specific Working Group.
- Scribe (Working Group): Reads out feedback from sticky notes and takes notes during the discussion.
- Newcomer: Shares their thoughts with the Topic Group they are visiting and highlights any incongruencies with what they have developed within their own Topic Group.

Time

70 minutes

Materials

- Feedback from the previous Gallery Walk
- Pin board or wallspace
- Markers
- Flipchart paper
- Sticky notes



At WMS24, people decided where to go in this session on largely on an individual basis. This meant they were able to cater for their needs well, but more coordination within the Topic Groups about who would go where would have maximised the information exchange between the groups.

Equally, the fact that some participants wanted to visit more than one other group showed that individual needs seem to have had quite high priority for participants. These could be addressed more explicitly by facilitators while helping the groups act more collectively.

7. Improve Proposals

Levels

Working Group, Topic Group

Intention

Integrate feedback into proposals and prepare them to be presented again

Desired Outcomes

- Feedback integrated into the Working Group proposals
- Improved set of proposal for each Topic Group prepared for a final round of feedback

Agenda

- **Instructions** (Topic Group) [5 minutes]
 - ↳ Ask participants to get into their Working Groups and integrate the feedback from the last gallery walk and feedback with the newcomers
 - ↳ Ask Working Groups to reuse the template poster
- **Integrate feedback** (Working Group) [30 minutes]
 - ↳ Refresh memory of the insights distilled at the end of the last session
 - ↳ Rewrite the proposals integrating the feedback
 - ↳ Scribe updates the template poster with new proposals
- **Synthesise outputs** (Topic Group) [25 minutes]
 - ↳ Follow the same process as before (See [Draft Proposals](#))
 - ↳ Done by Proposal Owners and Topic Coherer (other participants can take a break during this time)
 - ↳ Scribes prepare template

Roles

- Facilitator: Supports Proposal Owners and Topic Coherer to synthesise the proposals generated at Working Group level into one Topic Group output
- Topic Coherer (Topic Group): Synthesises Working Group proposals into one Topic Group proposal
- Proposal Owners (Working Group): Synthesises Working Group proposals into one Topic Group proposal
- Scribe (Working Group): Takes notes and prepare the template

Time

60 minutes

Materials

- Feedback from the gallery walk and the previous session
- Pin board or wallspace
- [Templates](#) (Working Groups and Topic Group)
- Markers
- Flipchart



At this point at WMS24, there seemed to be a sense of “flow”: the participants and breakout facilitators were familiar with the process, they “knew the drill”, and so this part went very smoothly.

Photo credit: Jason Krüger (top) (bottom)

8. Present Proposals and Generate Feedback

Level

Plenary

Intention

Generate feedback to the improved proposals in order to facilitate plenary-level convergence

Desired Outcomes

- Overview and understanding of the proposals prepared in the breakout sessions
- Feedback on all of the proposals in the form of sticky notes

Agenda

→ **Instructions** [10 minutes]

- ↳ Remind people of the [Gallery Walk](#) format
- ↳ Explain what is on the posters
- ↳ Invite the participants to provide their feedback using sticky notes
- ↳ Remind participants how to write useful sticky notes
- ↳ Hand out sticky notes

→ **Walk and give feedback** [25 minutes]

- ↳ Participants read posters of the Topic Group proposals
- ↳ Participants put sticky notes with feedback next to the relevant poster
- ↳ Let participants know when they're halfway through

→ **Wrap up** [5 minutes]

- ↳ Inform participants that in the next session, the Coherence Team (formed of the Topic Coherer and Connection Spotter from each Topic Group) will meet to finalise the proposals
- ↳ The other participants can do an [open space technology](#) process or move on to other tracks of the event

Roles

- MC: Guides participants through this part of the process
- Topic Coherers: Stay with their Topic Group's templates to explain them to other Topic Groups
- Connection Spotters: Examine other Topic Group's templates to spot any connections or contradictions
- Logistical support
 - ↳ Hands out sticky notes and markers to participants
 - ↳ Brings boards with templates and feedback back to the Convergence Team room

Time

40 minutes

Materials

- Topic Group proposals on their templates
- Pin boards or wallspace to hang the templates
- Markers/Pens suitable for writing on small sticky notes
- Sticky notes



Gallery Walk III

This was the final gallery walk at WMS24. There was a decrease in the quantity of feedback being shared, which suggested that participants were either increasingly convergent and satisfied with the quality of the outputs – or simply ready to let go!

Photo credit: Jason Krüger (top) (bottom)

9. Finalise Proposals

Level

Coherence Team

Intention

Finalise the proposals so they can be voted on

Desired Outcomes

- Clear and coherent proposals that participants can vote on
- Clear highlighting of any alternative proposals

Agenda

- **Form Coherence team** [5 minutes]
 - ↳ Consists of Topic Coherers and Connection Spotters (total 16-20 people), gathered in a large enough room
 - ↳ Breakout facilitators are invited to join to support the process
- **Explain process and intended outcomes** [5 minutes]
 - ↳ Integrate final feedback into proposals
 - ↳ Clean up proposals
 - ↳ Wordsmithing and clustering
- **Integrate feedback** [25 minutes]
 - ↳ Present feedback from the gallery walk
 - ↳ Topic Coherers and Connection Spotters integrate feedback per topic (i.e. in parallel in pairs)
- **Clean up proposals** [35 minutes]
 - ↳ Topic Coherers and Connection Spotters
 - ↳ identify and resolve contradictions
 - ↳ merge duplicates
 - ↳ highlight where there are alternative proposals that cannot be integrated
 - ↳ Facilitators support them where needed
- **Finalise proposals** [20 minutes]
 - ↳ Topic Coherers and Connection Spotters wordsmith the proposals to ensure they are clear and can be easily understood
 - ↳ Facilitators support them and categorise finalised proposals into themes

Roles

- Facilitators: Support the coherence team to synthesise the proposals and add more clarity
- Topic Coherers: Synthesise the proposals and add clarity
- Connection Spotters: Synthesise the proposals and add clarity

Time

90 minutes

Materials

- Topic Group proposals on their templates with feedback from the last gallery walk
- Markers
- Sticky notes
- Pin boards or wall space



At WMS24, this session was a hive of excited activity. Although the session was originally planned to be led by two lead facilitators, some breakout facilitators joined to facilitate the process; it was very helpful to have more hands on deck!

However, there was not enough time to hone the wording of the proposals as much as we would've liked. As a result, the final proposals weren't consistently as clear and understandable as they could have been, which resulted in higher levels of abstentions for some of them in the final voting.

It is easy to underestimate the length of time this stage can take, so be sure to plan in more than you expect this step to take!

10. Prepare Proposals for Voting

Level

Facilitation teams

Intention

Prepare the finalised proposals for the participants to vote

Desired Outcomes

- Digital slides presenting the proposals participants will vote on
- An online survey of the proposals with appropriate response options

Agenda

- **Gather the final proposals** [5 minutes]
- **Type them up into a document** [30 minutes]
 - ↳ If the Coherence Team was able to cluster the proposals into themes, use the themes to determine the order in which the proposals are presented
 - ↳ The amount of time needed for this step will be determined by the number of proposals to be written up
- **Enter them into presentation and survey** [20 minutes]
 - ↳ Copy and paste the proposals one by one into the slideshow and adjust the formatting
 - ↳ Copy and paste them one by one into the Online Survey
 - ↳ The survey could be prepared with placeholder proposals (e.g. "Proposal 1") so that you can already fill in the response options
 - ↳ Then replace the placeholder text with the proposal text making sure that the order in the slideshow and the survey are consistent

Roles

- Lead facilitators: lead the session
- Transcribers: type up all of the proposals
- Copy-and-pasters: copy and paste all the proposals into the survey app and the slideshow

Time

55 minutes (depends on the number of proposals)

Materials:

- Slideshow
- Online survey
- Laptops



This was a real crunch point at WMS24 because we had underestimated the amount of time this would take. The breakout facilitators helped type up the proposals which were displayed on large sticky notes.

Copying and pasting each proposal one by one into the [Online Survey](#) was a laborious task and required a lot of concentration to avoid mistakes.

Make sure your access to the survey includes all the functionalities needed. Do a run-through of this whole process to make sure it will go smoothly.

11. Vote on Proposals

Level

Plenary

Intention

Indicate support for or opposition to the final proposals

Desired Outcomes

- Enough understanding of the final proposals to cast an informed vote
- Indications of support for or opposition to the final proposals

Agenda

→ **Instructions** [10 minutes]

- ↳ Provide context for the decision participants are being asked to make
 - ↳ Define scope of the vote (e.g. is it part of a ratification process or not, is it a vote on a governance proposition or on feedback to it)
 - ↳ Explain role of the voting in the wider context
- ↳ Ask participants to open the [Survey Tool](#) on their devices
- ↳ Explain voting rules
 - ↳ One vote per eligible participant and proposal
 - ↳ Define eligibility criteria (e.g. members of a certain stakeholder groups might not be eligible to vote)
 - ↳ Voting options
 - ↳ Support (= yes)
 - ↳ Oppose (= no)
 - ↳ No vote (= abstention)
 - ↳ Make clear that there will be no space for discussion or amendments as this has been covered in the process up to now
 - ↳ Explain that voting commences proposal by proposal
- ↳ Check that the rules are clear to all of the participants
- ↳ Inform participants when and where they will be able to access the results of the voting

→ **Present proposals and vote** [10 minutes]

- ↳ Read proposals aloud and display them on the slideshow one by one
- ↳ After each proposal has been read aloud
 - ↳ invite participants to ask questions if they are unclear about the meaning of the proposals. The MC answers the questions they can answer or they refer to members of the Coherence Team for questions they can't answer. Do not allow discussions
 - ↳ ask participants to indicate support, opposition or abstention, allowing them sufficient time to consider their response
- ↳ Depending on the format of the survey app, remind participants to click "submit" at the end so their votes are counted
- ↳ The amount of time needed for this step will be determined by the number of proposals to be voted on

Roles

- MC: Guides participants through the process
- Usher: Provides microphones to participants who want to ask questions
- Tech support: Publishes the survey in the [Online Survey](#)

Time

120 minutes (depending on the number of proposals)

Materials

- Slideshow
- Online survey
- Microphones

28. Clarify whether Affiliates can charge membership fees.

Please select “support”,
“oppose” or “no response”!



Members of the MCDC as well as WMF staff and Board of Trustees present at the Summit did not participate in the poll. This was agreed upon beforehand by the Steering Committee to ensure that the results clearly represented the support from participating affiliates. The fact that they couldn't vote and the reasons why could have been more clearly explained beforehand and restated in the plenary. Particularly in such a high-stakes situation, you can't highlight such crucial information too much!

At WMS24, we used [Slido](#) to conduct voting as an [online survey](#). We shared it with participants via a QR code on screen, which worked well for phones, but didn't allow people to easily access the survey from laptops. We quickly shared a link in a chat with all Summit participants, but all formats should be prepared in advance.

We did not at first invite participants to ask clarifying questions, which meant that there was some discussion amongst participants before we adapted the process on the spot to explicitly encourage such questions and let participants with relevant knowledge answer them for everyone.

For some clarification questions, there was no clear answer and the MC suggested that if they were in doubt, participants could click “No response”. Therefore, the number of abstentions was indicative of the quality of the proposals presented.



12. Prepare Results

Level

Facilitation teams

Intention

Process the voting results in order to present them to the participants

Desired Outcomes

- Complete and reliable voting results in a shareable spreadsheet
- Visualisations of the voting results included in the process slideshow

Agenda

- **Preparation before the event** [120 minutes]
 - ↳ Create a spreadsheet and some dummy data to test it. The spreadsheet should support
 - ↳ transforming the data from vertical to horizontal format
 - ↳ calculating percentages as a total of all votes or a total of those who voted to support or oppose (i.e. excluding those who abstained)
 - ↳ ensuring the percentages are not separated from their corresponding proposal
 - ↳ arranging the proposals in order of highest to lowest support in a new sheet with a description at the top
 - ↳ colour coding the proposals based on the degree of support
 - ↳ Run through all of the below steps beforehand to check it all works
- **Download data** from the survey app [5 minutes]
- **Copy and paste** the data into the prepared spreadsheet [5 minutes]
- **Export** the Support Level sheet as a shareable PDF [5 minutes]
- **Take a screenshot** of the most important aspects to present to participants and integrate it into the process slideshow [5 minutes]

Make sure you have a good Wifi connection! Having all of the participants on their phones voting slowed down the Wifi and the number cruncher had to go to another part of the building to get a good connection – and some peace and quiet!

During the number crunching, a stakeholder approached the MC to make requests about how the data should be analysed and presented. Although we had agreed on how the data would be presented with the program team, which enabled us to handle the situation gracefully, you could take additional precautions to check with any relevant stakeholders beforehand. Generally be prepared that this exciting, but potentially nerve-wrecking time may elicit strong emotions from stakeholders.

Roles

- Lead facilitators: coordinate the session
- Spreadsheet wizard:
 - ↳ Downloads the data and fills in the spreadsheet
 - ↳ Ideally the person who created the spreadsheet
 - ↳ Important they don't have any other job at this point so they can focus

Time

Prep 120 minutes; 20 minutes on the day

Materials

- Voting results
- Laptop
- Prepared spreadsheet

13. Present and Celebrate Results

Level

Plenary

Intention

Share the voting results with participants on-site and with the wider community

Desired Outcomes

- Clarity about the results
- A sense of excitement about the success of the process

Agenda

- **MC presents the results** [20 minutes]
 - ↳ If you have under 10 proposals, go through all the proposals and results
 - ↳ When over 10 proposals, provide
 - ↳ an overview of the data
 - ↳ some highlights of key results (e.g. 10–12 most supported proposals)
 - ↳ a link to the full results so everyone has access to the data
- **Celebrate!** [10 minutes]
 - ↳ Thank participants for their hard work and sticking with the process
 - ↳ Explain what a great achievement this is

Roles

- MC: Presents the results to the participants

Time

30 minutes

Materials

- Slideshow

The results are in!

Years leading up to this

2.5 days of hard work

46 outputs

106 on-site votes

At WMS24, presenting the results was a real highlight as all of the proposals were passed, and a significant number of them with super-majorities. Even proposals thought to be controversial achieved support levels of over 90%.

After showing an overview of support levels, the MC read aloud the top 12 results along with their corresponding levels of support. We wanted to show participants how successful the process was that very ambitious proposals got such high levels of support.



14. Close and Preview

Level

Plenary

Intention

Provide closure and inform participants about how the process will be followed up

Desired Outcomes

- Understanding of the next steps, who is responsible for them and how participants will be updated about progress
- Closure by hearing a summary of the event from an organisation leader

Agenda

- **Give an overview of the wider process** [10 minutes]
 - ↳ Explain what the next steps are, e.g. what will happen to the proposals and who will take them forward
- **Outline next steps** [20 minutes]
 - ↳ If the next steps are being led by a specific group, ask them on stage to explain what they will do with the outcomes of the process
 - ↳ Explain any follow-up milestones and responsibilities and how participants will be informed about the progress made
 - ↳ Give concrete names and dates where possible
 - ↳ Graphics are useful to effectively explain the pre- and post-event stages
- **Closing speech by an organisation leader** [20 minutes]

Roles

- MC: Summarises what has been achieved and how, and invites those who need to speak on stage
- Group/person taking the results forward: Explains what has been achieved specific to their group, outlines the next steps and how participants can keep up to date with progress
- Organisation leader: Provides a closing speech

Time

50 minutes

Materials

- Slideshow

Organising Committee



At WMS24, the MCDC were asked to come on stage to explain how they would take the results forward and integrate them into the Charter. We had asked them beforehand, so they were prepared to come on stage and make a speech. This was very important to reassure participants that their work was not just an exercise, but will have an impact on the Charter. However, we could have done more to explain to the participants what the next steps leading towards the ratification of the Charter are.

At the Summit, there were also sessions exploring the future of affiliate events since WMS24 was the last Summit organised and run by Wikimedia Deutschland. The representative from the Future Gatherings group was also asked on stage to give a summary of the decisions made in the sessions and to outline the next steps they would take.

The closing speech was given by Maryana Iskander, CEO of the WMF, who thanked the participants for their hard work and situated it in the wider process of change in the Wikimedia movement.



Photo credit: Mike Peel (top left) (top right) (bottom)

15. Reflect and Learn

Level

Facilitation and other event teams

Intention

Reflect on experiences and feedback from participants and stakeholders in order to derive lessons learned

Desired Outcomes

- Identified and collated key learnings
- A sense of ongoing connection with participants and stakeholders

Agenda

- Create and share a feedback form with participants in order to capture their reflections. Remind them to fill it in several times
- Debrief with all relevant teams immediately after the gathering
 - ↳ Facilitation
 - ↳ Program
 - ↳ Logistics
 - ↳ Tech
- Debrief with key stakeholders as time permits
- Analyse and discuss participants' feedback form responses

Roles

- Facilitator: Guides participants through a process of reflection
- Scribe: Captures the reflections and synthesises into learnings
- Survey consultant:
 - ↳ Designs and creates feedback form for participants
 - ↳ Analyses and presents the data

Time

Several hours/days

Materials

- Online Survey tool
- Laptop or pen & paper

We, the facilitation team, debriefed with the program and logistics teams the day after the Summit, in order to reflect on our own experiences and to give each other feedback while it was fresh in our minds. This was immensely helpful to draw out the key learnings. Each of the teams also debriefed internally.

Participants' feedback form responses were analysed by a consultant and the report was shared with the Wikimedia movement. This provided insight into the experience of the participants and what was most important to them. Participants were very happy with the facilitation and the process, which is why we're writing this playbook!



Photo credit: [Jason Krüger](#)

Good enough is perfect A Wikimedia playbook for collective deliberation

Tools

Sticky Notes

Sticky notes are small pieces of paper that can be stuck and re-stuck to a surface. They can be used to gather points (ideas, comments, suggestions, etc.) and share them visually. We decided to use them because participants can write their thoughts down and then easily share them in a relevant place. Sticky notes can also be moved around which allows them to be easily clustered and replaced.

Once you have written a note, take the top sticky note off the block by peeling it from the corner where the glue is. This way the sticky note won't curl up and it will remain easily readable from all angles. If using specific styles or colours for specific purposes, ensure that you have ordered a sufficient quantity of each colour.

Additionally, here are four guidelines on how to write legible sticky notes:

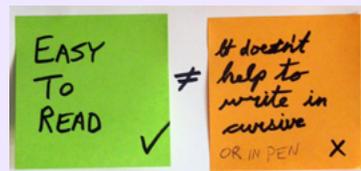
1. Only one idea per note



2. Keep it short



3. Use felt pen; don't write cursive



4. Prefer capital letters

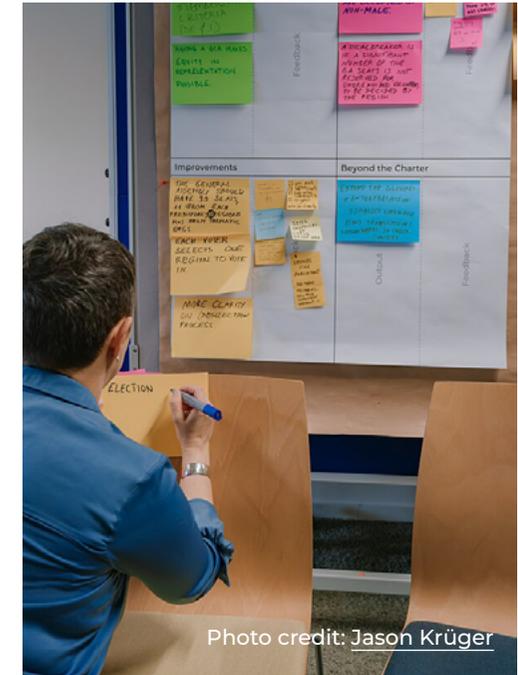


Photo credit: Jason Krüger

Sticky notes were invaluable to our process at WMS24. We used them in the Gallery Walks and Topics Groups so that participants could capture their thoughts and stick them to the templates. This meant that when participants were filling in the template poster and they wanted to make an amendment to the content, they could simply throw that sticky note away and write a new one, rather than crossing out text on the template and trying to fit it. This way we kept the templates themselves clean and could use them again and again.

Clustering

Clustering means organising individual points (ideas, concepts, feedback) into sensible groups (clusters). If the points are captured on sticky notes, it helps you make sense of a seemingly random heap of notes. It also prepares the group to make decisions by dot voting.

As a facilitator, follow this (or a similar) process when clustering;

- Start by moving together clearly related notes and explain how they are related.
- Ask people which others belong to this cluster.
- Repeat this to form more clusters.
- Go through left-over sticky notes and ask whether they belong into an existing cluster, form a new one or stay singletons.
- Go through clusters and ask people for labels (or suggest some yourself).

Clusters need to be specific and support focused discussion!

Dot Voting

Dot voting is voting for an item (e.g. idea, proposal) by placing a dot next to it. Participants are usually limited in the number of dots they can make. You can decide how you want them to distribute their dots to the items (e.g. freely, 3-2-1).

Dot voting is useful to quickly prioritise items within a group. It also enables participants to read and consider content in their own time because they can make their dots whenever they're ready, rather than voting by putting up their hand when a question is asked to the group.

Participants can use marker pens or sticky dots for dot voting. If you aren't using sticky dots, you cannot monitor the number of marks each person makes; insofar the correct use of the tool is based on trust.

For voting on more consequential matters, consider using an [Online Survey](#).

Template Poster

A template poster is a large piece of paper with headings for participants to fill in so that their proposals and feedback can be captured in a structured format. We use templates to collect proposals from participants in a structured way and in order to help Working Groups and Topic Groups to converge to a limited number of proposals.

They also provide space for participants from other Topic Groups to give feedback on the proposals, ensuring feedback from all participants on all proposals, which is necessary to work towards plenary-level convergence.

To use it, 1) put the templates up on boards or wall space, 2) fill in boxes at the top of the template, and 3) fill the rest with sticky notes.

[Downloadable high resolution pdf](#)

Topic	Working Group	Notetaker	Gallery Walk 2/3
Celebration		Deal-breakers	
Output	Feedback	Output	Feedback
Improvements		Beyond the Charter	
Output	Feedback	Output	Feedback

Below is a completed poster from WMS24. We used A0 size paper.

We asked the Working Groups to come up with a name for themselves so that their template posters don't get mixed up and to document their outputs at various stages of the process more easily.

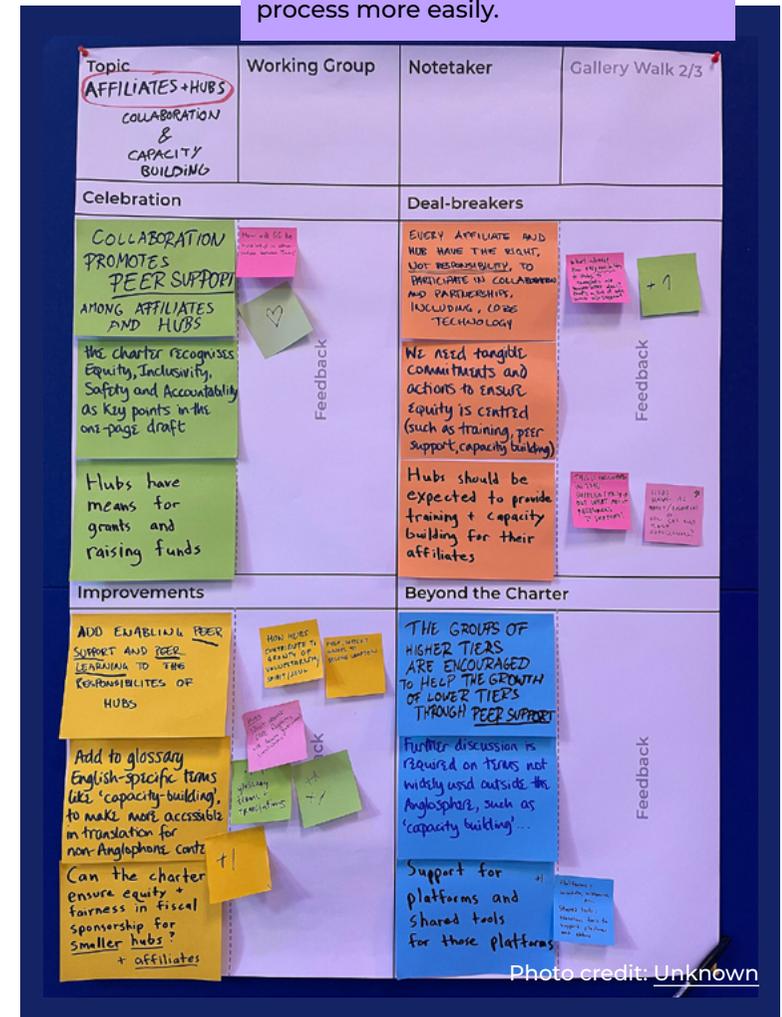


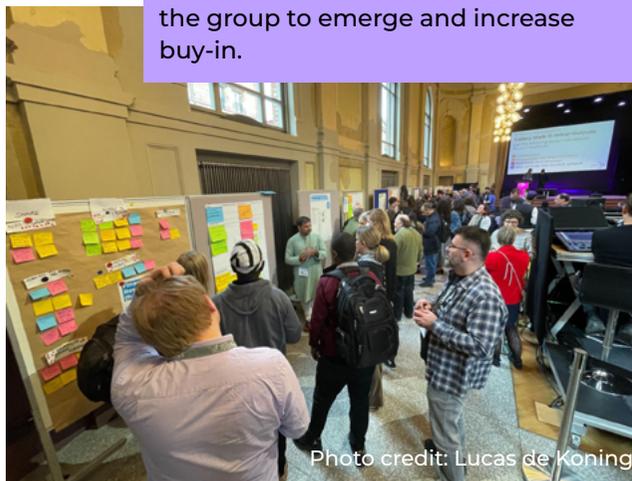
Photo credit: Unknown

Gallery Walk

Gallery walks involve putting posters on pinboards which participants can walk around, look at and put their sticky notes with feedback on. Ideally, the gallery walk takes place in a plenary space which is large enough to accommodate many people milling around.

It can be used to: 1) generate feedback on the initial proposition; and 2) generate feedback on proposals coming from Topic Groups.

Given that Topic Groups each work on one specific topic, it is important for all participants to have the chance to see what they have come up with, and comment on the work that the Topic Groups have created. This will enable the collective intelligence of the group to emerge and increase buy-in.



Online Survey

Online Surveys can be used to gather various forms of input from participants, e.g. their support for or opposition to a proposal.

We decided to use a tool called Slido because it has an easy to use interface, is GDPR compliant and offers the functionality required, i.e. multiple choice response options, slideshow interface, and several surveys live at once. Slido is pretty intuitive to use, and there are many tutorials online for it.

We highly recommend running through the whole process from inputting the questions, sharing the surveys (QR code or link), checking if the data is in the desired format, to downloading, processing, and presenting it, as it has multiple points of potential failure.

Slido automatically generates graphs and reports with the data, however, for collecting data at WMS24, this was not useful to us. We wanted to present the data of participants who indicated that they supported or didn't support the proposal, excluding those who indicated "No Response". Hence we used a spreadsheet to analyse and present the data.

If you have two groups of participants that you want to collect data from separately, you will need to create the survey including all of the proposals and response options and then duplicate the survey. Practice doing this ahead of time so you can be sure you have full access and functionality necessary.

Keynote Speaker

A keynote speaker is an external person of prominence on the topic of the event who comes to the event to share their perspective. Inviting a keynote speaker helps create an engaging and inspiring atmosphere. They can share their wisdom and insights, providing participants with additional input for their work at the event.

We invited a keynote speaker because we wanted to show participants that there are other organisations who are facing similar challenges and opportunities – “we’re not alone, there are others in the same situation”.

Usually, keynote speakers have a substantial amount of time (e.g. 20 minutes to 1 hour) to share their thoughts and answer questions. This is usually part of the opening of the event.

At WMS24, we were honoured to have Amitabh Behar, CEO of Oxfam International, come to speak and share his insights and experiences of decentralising Oxfam into autonomous organisations based on geographical areas.



Photo credit: Jason Krüger

“Connection” Exercise

This simple exercise involves asking participants to turn to one of their neighbours, introduce themselves to each other and share their hopes for the event.

It can be used to create connections between participants, encouraging them to get to know each other, and fostering a sense of shared humanity and good will. It can also provide first-time participants with the chance to break the ice and start making new friends.

A key stakeholder was concerned that participants would dive straight into critiquing and tearing apart the initial proposition. Knowing this, we wanted to use an exercise during the first session to set a tone of respect and appreciation for the rest of the event. We used this exercise to create a tone of seeing each other’s humanity, and acknowledging the diversity of reasons why participants are attending the event.



Photo credit: Jason Krüger (top), Mike Peel (bottom)

Spectrum Lines

Spectrum lines are an “on-your-feet” group exercise that makes visible how people in the room answer certain questions. It can be a useful tool to provide participants with a sense of who is in the room and in what ways they differ and are similar to each other. We wanted participants to feel connected to each other and to highlight the diverse experiences in the room.

In the exercise, you ask participants a question, for example: “How far did you travel to come to this gathering?” Ask participants to arrange themselves in a line representing the spectrum of answers to that question, for example: “If you live 5 minutes from here, stand on this side of the room. If you flew from the other side of the world, stand on this side of the room. If it’s something in between, place yourself on the spectrum somewhere in between.”

After people have settled you pick out a few people to briefly state where they are standing and why. Then move on to the next question.

At WMS24 we asked the following questions:

- How far did you travel to get here?
- How many summits/conferences have you been to?
- How familiar are you with governance?
- How comfortable are you with giving gratitude and appreciating others?
- How easy is it for you to trust others and let go of control when things are important to you?

This exercise worked really well to wake people up after sitting for quite long. People seemed to enjoy it and when we asked “How many summits have you been to?” the MC also asked for whom it was their first Summit and we gave them a round of applause to welcome them.

The further the questions went, the more challenging they became, but people were already warmed up enough to go along, creating another opportunity to get in touch with the “good enough is perfect” spirit. Particularly the question of gratitude and appreciation stuck with people and inspired many of them to show them more openly.

“Letting go” Exercise

This is a simple dialogue exercise we created based on advice from Samantha Slade.

It can be used to prime participants with the idea that they may have to let go of getting things exactly as they want in order to arrive at results and serve the collective good. We wanted participants to let go of the idea that they need to be part of every discussion, every step of the way. The exercise was intended to reinforce the wider framing and to help participants get to know each other more deeply.

Instructions: Invite participants to “Turn to your neighbour and tell a story of a time you let go of something important to you in order to serve the needs of the collective.” Provide them with an example. Tell participants to switch over when they are half way through the allotted time.

At WMS24, this exercise was planned to be included in the opening ceremony. However, we ran out of time and had to make a pun about letting go of the “letting go” exercise!



Photo credit: Jason Krüger

Glossary

Affiliate:

A Wikimedia movement affiliate is a stand-alone, independent organisation formed by people who use Wikipedia and other Wikimedia projects ([Source](#))

MC:

Master of Ceremonies; here: the lead facilitation team member that guides through the process on the main stage

MCDC:

Movement Charter [Drafting Committee](#), the group responsible to draft the Wikimedia Movement Charter

WMDE:

[Wikimedia Deutschland](#), the German Wikimedia chapter

WMF:

Wikimedia Foundation, the host of Wikipedia, other open knowledge projects and essential Wikimedia movement infrastructure

WMS24:

Wikimedia Summit 2024 (aka “The Last of Its Kind”)

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