



Short URL: <https://mydata-global.org/action-plan-2020-revised>

# Budget and Business Plan – Objectives for 2020 MyData Global CHANGES DUE TO COVID-19

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# 1. Introduction (REVISED)

**This document is a revised action plan, written in May 2020, to take into account the COVID-19 crisis, as it has a huge impact on the action plan for the year.**

**For the sake on the June 16, 2020 spring general meeting, it is SECTION 5, page 8, that is relevant. Other parts are left in the document for transparency.**

## **Key background documents for the development of this plan:**

Original action plan approved in Autumn General Meeting 2019 can be found here: <https://mydata-global.org/objectives-2020>

For the action plan for 2019, see draft for the board here: <https://mydata-global.org/okr-2019> and the approved document here: <http://bit.ly/mydata-objectives>

The action plan derives from the organisation's strategy for 2020-22.

Find the strategy team's background work here: [strategy long text](#).

The strategy developed by the strategy team and presented to the board as this deck: [strategy slides](#) and then approved by the board & presented to the Autumn General meeting 2019 as [this deck](#).

In the early autumn of 2019, the staff drafted their vision for what the organisation would do in 2020, recorded here: [retreat output](#).

The strategy team also produced a long-term strategic roadmap for the organisation the shape of a theory of change. The latest version (as of May 2020) can be found here: [Theory of Change](#).

*MyData Global uses the Objectives and Key Results -methodology (OKR) to set, align, communicate, and follow the yearly objectives of the organisation. The CEO reports progress on OKRs to the board every month. Staff members set more detailed individual OKRs on a quarterly basis and follow the progress of those in weekly meetings. See this short intro: <https://gtmhub.com/blog/okr>*

**Objectives** are the **WHAT**. Targets that are aspirational, challenging, time-bound, clear and usually qualitative.

**Key Results** are the **HOW**. Kind of intermediate goals: measurable, achievable, gradable, actionable, tangible and outcome-oriented. *To keep this document on*

*a high strategic level, the Key Results are not included. They are in the [Gtmhub](#) -service and the [drafting version](#) of this document.*

*Next page onwards are the yearly **objectives** and their brief descriptions for 2020. These are categorised under the **activity areas and core activities**.*

## 2. Core activities & impact areas (NO CHANGES)

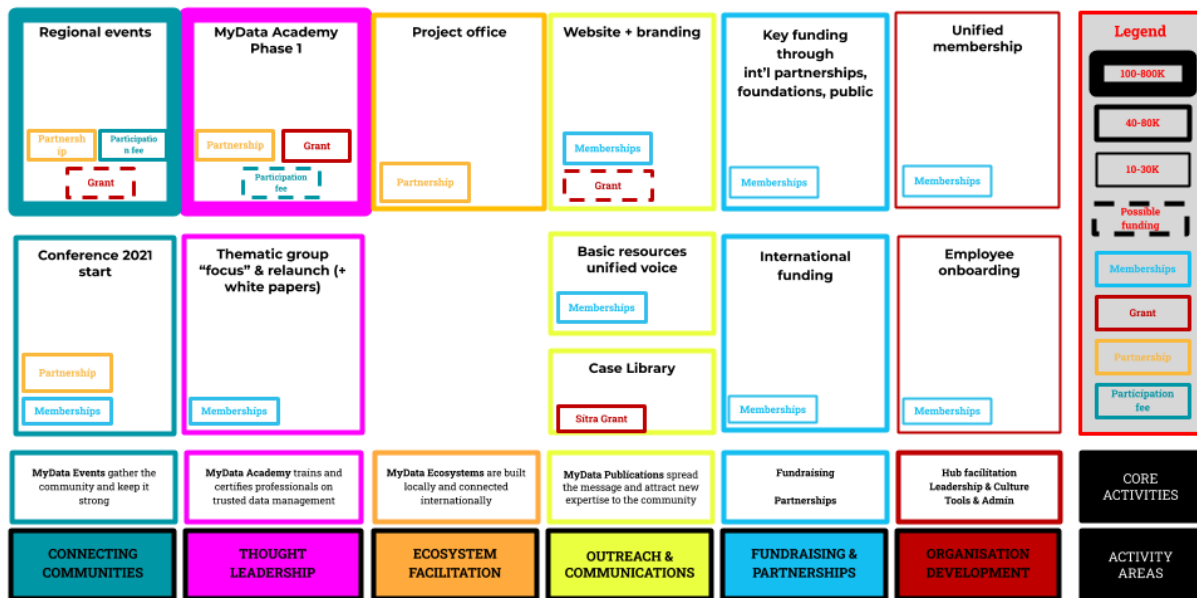


### 3. Internal areas (MINOR UPDATE)



## 4. Strategic priorities (REMOVED AS NO LONGER VALID)

### Priority activities: Funding needs & how funded



Based on Theory of Change

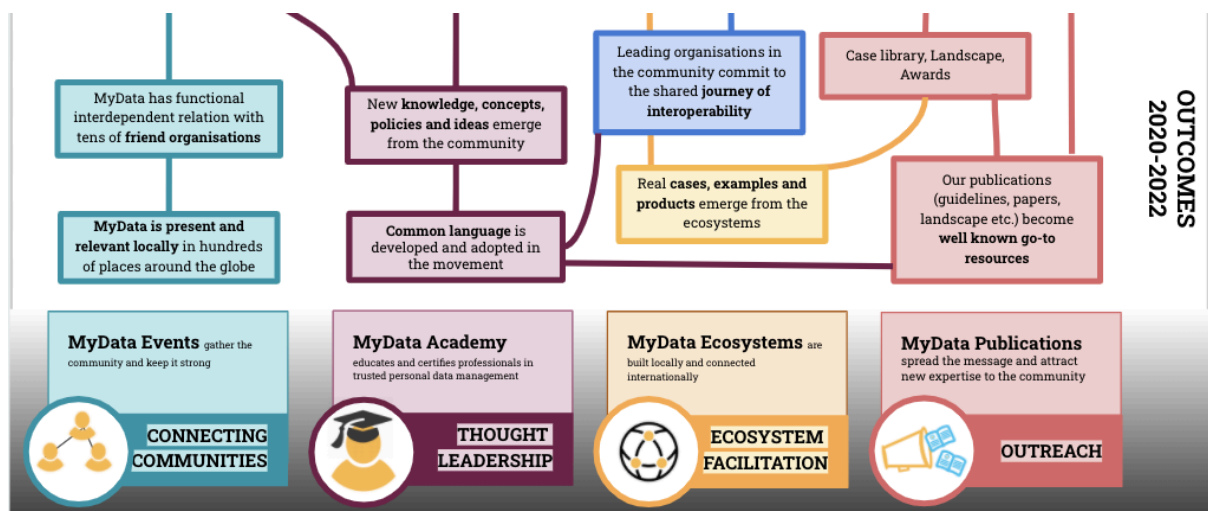
## 5. Strategic decisions guiding our work in 2020 (MINOR UPDATE)

1. **Financial self-sustainability for the core activities based on membership fees:**  
We build our finances towards the objective of being able to sustain the organisational core activities (see Brand and Organisation — the Engine) with the membership fees by the end of 2022. Once we meet that objective of self-sustainability, external funding (grants, projects, donations) will be sought and used only to scale our work on the four impact areas.
2. **Hubs and thematic groups are part of MyData Global's organised activities:**  
We use the term 'MyData Organisation' to refer to the MyData Global association and Hubs and Thematic Groups, which have a formal connection to the association.
3. **Thematic groups are separated from hubs:** thematic groups are output-oriented, and their work is part of the thought leadership impact area.
4. **Simple membership policy:** In order to ensure accountability, we will harmonise the relationship between Hubs, members, and MyData Global. There is only one membership for MyData and that is the membership of MyData Global. In practice this means that if a Legal Entity Hub (a hub that has formed into a legal entity) has members, they must also be members of MyData Global.
5. **Four impact areas and two main products:** As of now, the impact strategy of MyData Global is built around four impact areas: *Connecting Communities*, *Thought Leadership*, *Ecosystem Facilitation*, and *Outreach* AND two related 'main products' the *MyData Events* and *MyData Academy*. *MyData Events* is already mature and will be separated to its own legal entity during the strategy term while *MyData Academy* is just being incubated during the strategy term.
6. Our **fundraising principles** are *independence* (no compromise on decision-making, alignment with strategy), *neutrality* (freedom also to criticise our funders, non-exclusivity) and *transparency* (funding sources are public and spending open by default).
7. **Separating MyData Events to another legal entity:** Prepare founding of "MyData Events and Services Ltd" as a 100%-owned company of MyData Global ry, for revenue-generating services (now Events, later e.g. Academy).

For reference: earlier formulation of decisions:

1. The outgoing board and the general manager present the strategy in the autumn general meeting and the action plan and budget derived from the strategy are approved in the meeting. The incoming board and general manager will revise the strategy based on feedback and its input. The revised strategy will be approved in the spring meeting. This process will be followed yearly starting 2020.
2. The strategy is based on 4 activity areas and two “products” (2 others still in development)
3. Our funding is based on fundraising principles
4. We define what we don't plan on doing 2020-2022
5. We harmonise relationship between hubs, members and MyData Global Association and unify membership
6. Hubs and Thematic groups are separated.
7. Founding of a separate company, “MyData Events and Services Ltd” as a 100%-owned company of MyData Global ry, for revenue-generating services (now Events, later e.g. Academy) is prepared.

*In terms of impact, in 2020, we work mainly on the Theory of Change Level 1 outputs, now called “Outcomes 2020-2022”. To be able to achieve impact and deliver on the outputs, we of course need internal development as well.*





## 6. Summary of strategic 2020 objectives (REVISED)

1. **Membership matters: value is clear, communicated, felt, simple, and scalable.** Membership value proposition is clearly defined, articulated and communicated. Membership feels valuable. Membership in MyData Global and local MyData hubs is simplified. Membership processes are smooth, we are ready to scale.  
***DONE** when leadership and hubs use membership value proposition for membership acquisition, and membership processes and policies are in place*
2. **We recover from immediate financial troubles and are financially fit.** Financial situation, incl. international funding, is stabilised, predictable and diverse. Finance processes are clear for staff and hubs.  
***DONE** when we have over **50K€ in account, 25K€ in reserve**, and revised monthly finance reporting is defined and practiced.*
3. **Online MyData conference is a success.** Impactful and financially sustainable online conference is implemented. This provides the base for event cycle 2021, which tentatively consists of one or more regional conferences.  
***DONE** when the conference report has been published and the conference is profitable.*
4. **Branding is clear and protected.** MyData brand and IPR are protected in key countries. The brand usage instructions are clearly communicated to hubs and members through guides and regulations.  
***DONE** when trademark has been filed in key jurisdictions and brand use is instructed in hub/branding documents.*
5. **We communicate pragmatic progress toward our vision.** MyData presentations and cases are available online and easy for everyone to use. We can communicate changes in the world and our impact with a small effort.  
***DONE** when the case library and presentations are live, communicated, in active use and regularly updated.*
6. **MyData community is connected and lively.** Adequate guidelines, tools and processes for participating and contributing in the MyData community activities exist and these are used regularly. MyData Global members are connected with their nearest local hubs.  
***DONE** when we have adequate metrics and processes to measure the community's size and depth.*
7. **Clarity through separating nonprofit and commercial services.** The founding of a separate company, as a 100%-owned company of MyData Global ry, for revenue-generating services (now Events, later e.g. Academy) is prepared.  
***DONE** when there are proposals for founding documentation, to be discussed in the autumn general meeting.*

*For reference, previously approved goals:*

- 1. MyData branding is revised and coherently applied.*
- 2. Key MyData materials and cases are available online and easy for everyone to use.*
- 3. Impactful and financially sustainable 4 regional events & 2 community meetings are organised. They provide the base to kick-off global conference 2021 project.*
- 4. MyData Academy is ready to be launched - core module(s) and funding is secured.*
- 5. Participating and contributing to MyData community activities is made clear and smooth.*
- 6. Financial situation, incl. international funding is stabilised to ensure the realisation of the actions and dynamic and successful development of the organisation.*
- 7. Founding of a separate company, "MyData Events and Services Ltd" as a 100%-owned company of MyData Global ry, for revenue-generating services (now Events, later e.g. Academy) is prepared.*
- 8. Membership across Hubs network and MyData Global org is unified, smooth and valuable.*
- 9. Our tools and processes are streamlined using ethical considerations.*
- 10. The Culture Guide that will provide a comprehensive and ever evolving guidance for any new or old member of the community is launched.*
- 11. We embrace the diverse development stage of Hubs, and provide meaningful means to grow and make an impact.*

## 7. 2020 strategic objectives in full (REMOVED AS NO LONGER VALID)

### ~~A. Connecting Communities – impact area~~

#### ~~● Core activity: Event Cycle~~

#### ~~● Priorities:~~

- ~~○ Support the growth, cohesion and engagement of the community members in different parts of the world~~

~~Face-to-face meetings offer unique opportunities for building cohesion and engagement within the organisation's membership and the community around MyData and local hubs. The MyData community's well being and vitality depend on face-to-face meetings: without regular meetings, the community (largely conceived) loses its momentum. Therefore the **primary strategic objective of the Event Cycle is to support the community**. The Event Cycle also supports thought leadership (knowledge exchange), ecosystem facilitation (doer matchmaking), outreach (visibility and new audiences), and advocacy (high level participants).~~

#### ~~● Objectives from strategic priorities~~

- ~~○ **Impactful and financially sustainable 4 regional events & 2 community meetings are organised. They provide the base to kick-off global conference 2021 project**~~

~~MyData events support the community cohesion, dissemination and development of thought leadership as well ecosystem facilitation. The process and tools to support those functions will be developed throughout the year.~~

~~There will be four regional events in 2020:~~

- ~~○ MyData South America (24 June in Rio, Brazil)~~
- ~~○ MyData Asia 2020 (29-30 June in Tokyo, Japan)~~
- ~~○ MyData Europe 2020 (17-18 September in Berlin, Germany)~~
- ~~○ MyData Africa 2020 (mid November, in conjunction to IODC in Nairobi, Kenya).~~

~~Additionally, 2 community meetings will be organised:~~

- ~~○ Spring: In Amsterdam (March 2020)~~

- ◉ ~~Autumn: Location and dates to be decided.~~

~~The role of MyData Global is to coordinate the events on the strategic level and make sure they meet the “golden standards” of MyData events and are financially sustainable.~~

~~The regional events will feed into the development of the concept for the global conference 2021 to be held in Helsinki. The project will be kicked off in the Q4 of 2020, after MyData Africa 2020.~~

~~The Events Lead from MyData Global will be responsible for this core activity.~~

### **Business as usual: Community facilitation**

- ◉ **Participating and contributing to MyData community activities is clear and smooth**

~~One of MyData Global's guiding principles is Culture of Proactivity – where we promote and foster proactive contribution to ongoing projects, work packages and general discussions. As an organisation we “open up processes as early as possible, invite contributions and taking initiatives.” While MyData Global has the role to coordinate centrally, we must avoid giving in to the temptation “to do things on our own.”~~

~~To foster participation and this proactive engagement to the organisations strategic goals, activity areas and concrete outputs, we need to communicate them clearly as well as provide a clearly defined process, so people and organisation can contribute where they see best fit.~~

~~This said, the beauty of proactive “grassroot” initiatives is about giving the space and support to tackle identified gaps as well as explore topics of their interest, that are not in the core of the MyData Organisation. Co-creating fosters a sense of ownership, a feeling of responsibility and agency to influence how the Organisation and community grows and operates.~~

## **B. Thought Leadership – impact area**

**Core activity: MyData Academy**

- **Priorities:**

- Academy building and first module(s) rollout

- **Objectives from strategic initiative(s)**

- **MyData Academy is ready to be launched – core module(s) and funding is secured**

*Through building the curriculum and modules, map “MyData Minds” & topics (this also provides value to thinkers and doers in the organisation and the community). Thematic group concept will be relaunched on key topics with White Papers and/or Academy teaching materials as outputs.*

## **D. Outreach & Communications – impact area**

- **Core activity: Creating and promoting engaging MyData publications and content**

- **Priorities:**

- Branding Project – Spreading Core Messages through basic Resources with a Unified Voice
- Website Development Project – Amplifying Organizational & Community Presence
- MyData Case Library (eventually: Landscape) – Promoting Examples and Doers (based on Sitra Miracle work)

- **Objectives from strategic priorities**

- **MyData branding has been revised and coherently applied**

**Branding** will clarify the similarities and differences of MyData as an idea, as an organisation, as Hubs, as Thematic Groups, as conferences and as all other possible “sub branches” in the ecosystem. Result: Easy, simple, engaging Style Guide. The branding is supported by the work done to **the Culture Guide**.

New **mydata.org site** will build up the credibility of the organisation and create better access for the content created to support the movement. It should result also with easily customizable (sub)pages for the Initiatives.

- **Key MyData materials and cases are available online and easy for everyone to use.**

Main purpose is to spread our core messages, promote examples and doers in our community and the wider movement, and to amplify our organizational presence. This is done by making sure that we have an easily accessible, understandable and reusable set of resources.

## **E. Organisation Development – internal area**

### **Core activity: Building scalability**

- **Objectives from strategic initiative(s)**

- **Membership across Hubs network and MyData Global org is unified, smooth and valuable**

*"The unified membership should be brought in to place with "as a service" mentality from the beginning and looking at it from the perspective of Hubs, making sure that the Hubs benefit from global unified membership. Key enabler is a high quality membership registry and application process, which enables the local Hubs to see and manage their members through the global system. Other key is to create membership fee model and revenue share model in collaboration with the Hubs so that it become beneficial and attractive for the hubs to drive for new membership." Unified Membership is further explained in the [strategy long text](#)*

*In general, we need to focus on better membership management, how members are onboarded, how they can pay their membership fees etc. At the same time, it's even more important to clarify further the added value the membership gets in comparison of "regular" community members. Possible concrete actions:*

- Membership payment renewal (Stripe)*
- Investing with time and potentially other resources in 1) developing membership value offer 2) impact communication strategy*

### **1. Leadership & Culture – sub-area**

- **Objectives from strategic initiative(s)**

- **A Culture Guide that will provide a comprehensive and ever evolving guidance for any new or old member of the community is launched**

Purpose is to cultivate the Culture of MyData Global so that the community is working under the same guiding principles.

## **2. Tools & Admin – sub-area**

- **Objectives from strategic initiative(s)**
  - **Our tools and processes are streamlined using ethical mindset**

*Description*

## **3. Hubs development – sub-area**

- **Objectives from strategic initiative(s)**
  - **We embrace the diverse development stage of Hubs, and provide meaningful means to grow and make an impact.**

*“The key is to develop the network level structures and activities so that these can support different kinds of Hubs in different phases of development. In the early phases of a Hub the connection to Global and other Hubs is naturally inspiring and valuable, since at the local level there is typically only a handful of people who know about MyData. When local Hubs grow also the network needs to be developed so that it continues providing value for the Hubs that are not anymore dependent on it.” Hub Development Programme is further explained in the [strategy long text](#)*

## **F. Funding & Partnerships – internal area**

### **Core activity: Fundraising**

**Priorities:** Fundraising is a means to reaching MyData Global's strategic goals and ensuring the longevity of the organization and is as such done according to the following principles, which will naturally be well communicated: 1/ Independence, 2/ Neutrality, 3/ Transparency

- **Objectives from strategic initiative(s)**

**Financial situation, incl. international funding is stabilised to ensure the realisation of the actions and dynamic and successful development of the organisation**

*Description*

~~In 2020, MyData will seek international funding mainly from the corporate partners (eg to secure the funding for MyData Academy pilot through Academy Founding Partners) and from the major foundations/funders. Fundraising plan of the strategy work is [here](#).~~

~~The process will go in two steps:~~

~~Step 1: Understand and test the waters of new ideas, get past the gap—study the funding opportunities, test ideas and MVP of Academy with members~~

~~Step 2: Get strategic, aim for impact—Investigate opportunities to collaborate with corporations: reach out to Heads of Innovation, Chief Digital Officer, or Head of Data type of people, and seek leverage from eg Nordic innovation, Vinnova (Sweden), Danish Agency for Digitisation, Nordic Council of Ministers, Norwegian Agency for Digitisation.~~

~~First, friendly organisations, those that know about MyData and eg visited MyData conference will be approach. Then, we will reach out to the funders that we interacted with.~~

**~~Prepare founding of MyData Events and Services Ltd” as a 100%-owned company of MyData Global ry, for revenue-generating services (now Events, later e.g. Academy).~~**

~~Based on advice from our accountant, we need to possibly transition revenue-generating services to a separate company.~~

**~~Actively search for Ecosystem Facilitation projects~~**



## 8. Additional objectives for 2020 deriving from business as usual work (REMOVED AS NO LONGER VALID)

### ~~C. Ecosystem Facilitation – impact area~~

- ~~● Core activity: MyData ecosystems are built locally and connected internationally (“Project office”)~~

~~Ecosystem facilitation means bringing together the organisations that are actually doing MyData services in reality or willing to build those. Aim is to increase the speed of development and learning and at the same time find common direction towards the interoperability in the growing MyData ecosystem.~~

- ~~● Priorities:~~

~~Not a MUST strategic priority in 2020. Do if the opportunity arises, e.g. aNG.~~

- ~~● Objectives from business as usual work~~

- ~~○ “Opportunistic approach” Take any opportunities that present themselves to connect ecosystem actors.~~

### ~~F. Funding & Partnerships – internal area~~

- ~~● Get international funding~~
- ~~● Increase membership fees by 50%~~
- ~~● Raise the level of funds to 6 months runway~~

### ~~E. Organisation Development – internal area~~

- ~~● Develop HR strategy for a global organisation~~
- ~~● Develop towards more “adhocracy” culture~~
- ~~● Plan and implement training/professional development of the MyData staff~~
- ~~● Work on wellbeing of the staff.~~

## 9. Budget (REVISED)

MyData Global Budget - JUNE - DECEMBER 2020				
REVENUE		Total 6-12/2020		
Core / Membership-ORG / Revenue	€57,000			
Core / Membership-HUBS-share / Revenue	€4,000			
Core / Membership-IND / Revenue	€8,000			
Core / Other / Revenue	€5,000		Core	€74,000
Programmes / Project-funding / Revenue	€20,000			
Programmes / Grant / Revenue	€83,000		Programmes	€103,000
Event / Event-partnership / Revenue	€80,000			
Event / Event-tickets / Revenue	€20,000		Event	€100,000
<b>Total Revenue</b>	<b>€277,000</b>			
COSTS		Total 6-12/2020		
Core / Sales & fundraising / Payroll	-€7,000			
Core / Comms & branding / Payroll	-€6,000			
Core / Leadership & management / Payroll	-€10,000			
Core / Tools & admin / Payroll	-€11,000			
Core / Community & culture / Payroll	-€15,000			
Core / Sales & fundraising / Costs	-€3,000			
Core / Leadership & management / Costs	-€2,500			
Core / Comms & branding / Costs	-€7,000			
Core / Tools & admin / Costs	-€12,000			
Core / Reserve deposit / Costs	-€25,000		Core	-€98,500
Programmes / Sales & fundraising / Payroll	-€5,000			
Programmes / MyData substance / Payroll	-€25,000			
Programmes / Comms & branding / Costs	-€3,000		Programmes	-€33,000
Event / Sales & fundraising / Payroll	-€7,400			
Event / Comms & branding / Payroll	-€8,500			
Event / Leadership & management / Payroll	-€14,000			
Event / MyData substance / Payroll	-€14,000			
Event / Tools & admin / Costs	-€20,000			

Event / Comms & branding / Costs	-€20,000		
Event / Sales & fundraising / Costs	-€3,000	Events	-€86,900
<b>Total costs</b>	<b>-€218,400</b>		
<b>BALANCE</b>			
Revenue Core			€74,000
Costs Core			-€98,500
<b>Balance Core</b>			<b>-€24,500</b>
Revenue Programmes			€103,000
Costs Programmes			-€33,000
<b>Balance Programmes</b>			<b>€70,000</b>
Revenue Events			€100,000
Costs Events			-€86,900
<b>Balance Events</b>			<b>€13,100</b>
	€277,000		€277,000
	-€218,400		-€218,400
	€58,600		€58,600

For reference: previously approved budget [here](#).