# of portals and patterns

## A Grantmaking & Program Evaluation Update

Wikimedia Foundation
**meta.wikimedia.org/wiki/Programs:Evaluation_portal**
Jonathan Morgan, Learning Strategist
12/05/2013

For those of you who don't know me, I'm Jonathan Morgan and I'm part of the Grantmaking Learning & Evaluation team. Today I'm going to give you a quick update on some of our activities in Grantmaking and in Programs.

Programs:Evaluation portal

Translate this page

Other languages: Deutsch ⏣ • English ⏣ • français ⏣ • Bahasa Indonesia ⏣ • occitan ⏣ • português do Brasil ⏣ • svenska ⏣

Welcome to the Evaluation Portal, a hub for information on how to design effective projects and demonstrate impact.

Learn more about the Wikimedia Evaluation Portal

Library • Machine shop • Parlor • Printing Press • Leave feedback

This portal is under construction!

Ask questions and discuss program evaluation

THE LATEST IN WIKIMEDIA EVALUATION...

A RECENT QUESTION
When was the first Wikimedia photo competition?
When do you believe the first Wikimedia photo competition took place? I know about the first Wiki Loves Monuments in the Netherlands, but, t...

A NEW PATTERN!
Cookies by the exit
Post-event surveys are a great way to gather feedback and contact information from

RECENT ACTIVITY...

SarahStierch endorsed a learning pattern: Afterparty
LAST ACTIVITY: 04 DECEMBER 2013

SarahStierch endorsed a learning pattern: Icebreaker
LAST ACTIVITY: 04 DECEMBER 2013

SarahStierch endorsed a learning pattern: Materials in their own language
LAST ACTIVITY: 04 DECEMBER 2013

Us folks in Learning & Evaluation, along with Frank Schulenburg's Program Evaluation and Design Team, are tasked with supporting our movement partners in pursuing mission-aligned activities. By partners I mean everyone from volunteers to grantees and chapters, and by mission aligned activiteis I mean everything from Edit-a-thons and Wiki Loves Monuments to Gender Gap and Global South outreach.

One of the new initiatives we've launched to help support all these stakeholders and types of activities is the Evaluation portal, on meta. The evaluation portal, launched on October 1, providea a central hub for people to find resources, ask questions, discuss and collaborate.

Connect grantees (and other community members) with high quality, relevant resources

Encourage collaborative problem solving and knowledge sharing through:

- Q&A
- outreach
- case studies
- training modules
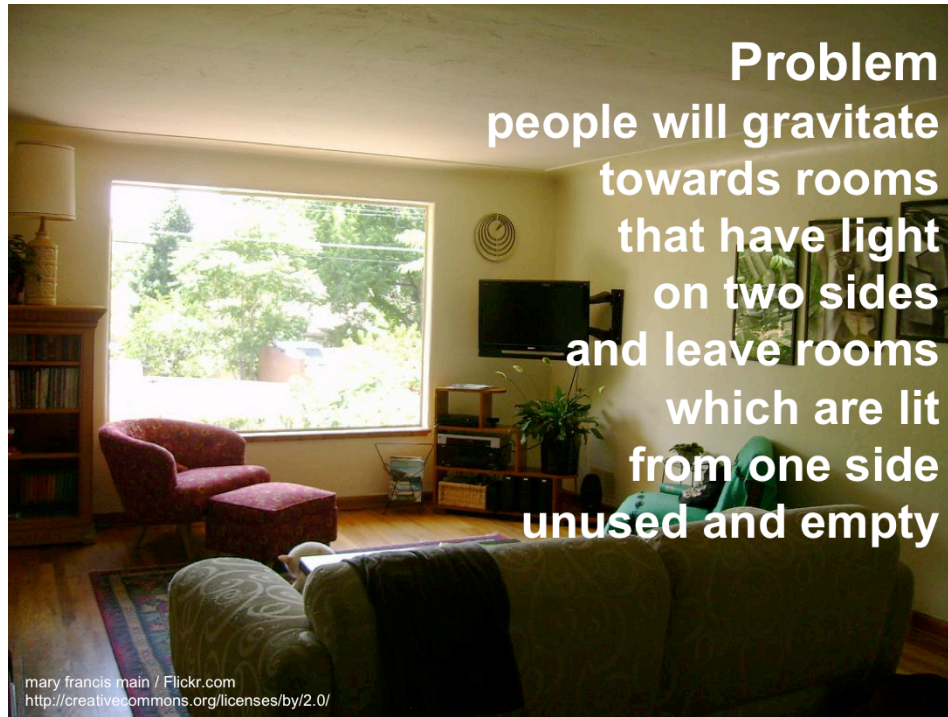- ...and **learning patterns**

We provide a set of curated resources to help with that, such as case studies, tutorials, and a new kind of resource called Learning Patterns, which I'm going to talk about today.

*"Each pattern describes **a problem** that occurs over and over again in our environment, and then describes the core of **the solution** to that problem."*

~ Christopher Alexander, *A Pattern Language*

So, what is a learning pattern and why should you care? Learning patterns are a kind of design pattern. Design patterns are <read slide>. Design patterns as we know them today were developed in the field of architecture and urban planning by Christopher Alexander, as a way of providing flexible, modular guidance for building spaces and cities that met the needs of the people who used them. A collection of patterns, called a pattern library, provides a set of advice, heuristics, templates, that can be mixed and matched to suit the needs of the current project.

**Problem**
**people will gravitate**
**towards rooms**
**that have light**
**on two sides**
**and leave rooms**
**which are lit**
**from one side**
**unused and empty**

This is one of Alexander's original patterns. It describes how to make interior spaces that people want to inhabit by providing light on at least two sides of every room.

**Solution**
**locate each room**
**so that it faces**
**outdoor space**
**on at least two sides**
**place windows**
**in those outdoor walls**

Linsenhejhej / Wikimedia Commons

This is one of Alexander's original patterns. It describes how to make interior spaces that people want to inhabit by providing light on at least two sides of every room.

wikis

patterns

Martin Strachoň / Wikimedia Commons

Design patterns have been used in many different fields, from software development and interaction design to education. And patterns and wikis are, literally, made for each other. The first wiki was a pattern library. But patterns have been used very little in our movement.

## Anatomy of a learning pattern

problem statement

solution statement
- details
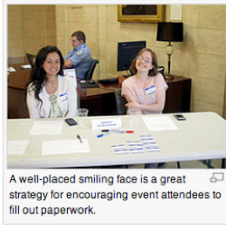- considerations
- use cases

related resources
- related patterns
- external links
- references

So we decided that because patterns were so flexible we would try to use this format as a way of capturing important advice and key 'lessons learned' for participating in movement aligned activities.

## What problem does this solve? [edit]

Post-event surveys are a great way to gather feedback and contact information from participants. Unfortunately, people often don't fill them out.

Surveys sent over email may get lost in the participant's inbox (if you managed to gather their email addresses in the first place!). Also, by the time the electronic survey is sent out, many people will have moved on to other things: the event they attended is no longer fresh in their minds, and even the people who respond may not offer the most useful feedback.

Delivering your feedback survey during the event by sending out roving volunteers with clipboards can help, but this approach also has problems: filling out a survey on a clipboard is awkward, and if the volunteer just passes out the survey it may get shuffled in with other papers and forgotten.



A well-placed smiling face is a great strategy for encouraging event attendees to fill out paperwork.

## What is the solution? [edit]

During the event, set up tables at all of the main exits to the event venue. On each table, place a stack of surveys and pens. Populate each table with one or two friendly event staff who are willing to invite people to fill out surveys as they exit. Display an enticing gift or treat on each of the tables (such as a bowl of branded pens, stickers or lapel buttons, or a large plate of cookies) to lure people over as they leave.

## General considerations [edit]

## Examples [edit]

## See also [edit]

## Related patterns [edit]

- Framing survey questions
- Asking the right questions
- Surveys at different points
- Who to survey

a **learning** pattern *i* for: survey, event



Cookies by the exit door

**Problem:**
*Post-event surveys are a great way to gather feedback and contact information from participants. Unfortunately, people often don't fill them out.*

**Solution:** *At the end of your event, set up a table with paper surveys and pens right next to the exit door. Staff the table with friendly volunteer, and offer people tasty treats for filling out the survey.*

*endorsed by: J-Mo*

- Jmorgan (WMF)
- FloNight (talk)
- ...

**endorse this pattern**

**Create** a new pattern  **Browse** more patterns  **Visit** the portal

created on: 25 September 2013

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Patterns can be complex, or relatively straightforward. This pattern is called "Cookies by the exit". It describes a simple strategy for getting people to fill out a post-event survey.

**a learning pattern** *i* for: surveys

Asking the right questions

**Problem:**
*You need to make sure that you don't accidentally leave important questions out of your survey.*

**Solution:** *Use different types of survey questions to ask for different kinds of information. To make sure you cover all of your bases, frame your survey around three or four types of question: background questions, activity questions, experience questions, and opinion questions.'*

*endorsed by: J-Mo*

- ...

endorse this pattern

⚙ **Create** a new pattern  ⚙ **Browse** more patterns  ◯ **Visit** the portal

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**a learning pattern** *i* for: outreach, event

Six account limit

**Problem:**
*You are going to give a workshop on how to edit Wikimedia projects or going to get students in a school or university to edit for the first time. No more than 6 people will be able to create their own accounts from the same IP.*

**Solution:** *The solution avoids people being unable to create accounts - and hence frustrated! - and saves a large amount of time spent in trying to solve the problem during the activity.*

*endorsed by: Ocastro*

- HAndrade (WMF)
- Rodrigo Padula (WMF)
- Frank Schulenburg
- ...

endorse this pattern

⚙ **Create** a new pattern  ⚙ **Browse** more patterns  ◯ **Visit** the portal

created on: 10 October, 2013

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**a learning pattern** *i* for: survey, gender gap

Gender identity

**Problem:**
*The traditional way of asking someone gender is either insensitive to transgender and gender non-conforming people, or does not capture the information you are seeking for.*

**Solution:** *Consider whether you actually need to know the respondent's gender, and if so seperate out the question on gender identity from gender history.*

*endorsed by: KTC*

- J-Mo
- ...

endorse this pattern

⚙ **Create** a new pattern  ⚙ **Browse** more patterns  ◯ **Visit** the portal

created on: 14 November, 2013

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Other patterns in our library, which is still small, but growing, include ones about how to ask effectice survey questions, ask demographic questions about gender identity inclusively,  and how to get around single-IP account creation limits when you have a lot of people registering at the same event, and how. but this is only the beginnning, and onyl a small set of the kinds of things that could be captured in learning patterns.

## Okay, so why *learning patterns?*

Challenges for design & evaluation

**...for grantees/volunteers:** relevant resources are hard to find & apply

**...for WMF:** key learnings are hard to synthesize into recommendations, requirements

So, we hope that these patterns provide a way for movement partners to find relevant and actionable resourcs that make it easier to do good work, and also to give them a clear path for contributing their own lessons so that others can benefit.

And as the pattern library grows and as patterns are used and refined, it will help us in grantmaking and program design get a better sense of successful strategies, pain points, and new opportunities for funding innovative projects.

## What's next?

Translation

Pattern hackathons

Better searching, browsing

Replace (some) reporting requirements

Learn more, fail better, grow, share, measure

THe portal only launched at the beginning of October, and our pattern library is still young. Next steps involve building out our translation workflow, we've already held one online pattern hackathon that gained us another half dozen patterns, and we're in the process of scheduling more. Improving browsing and searching as the library grows, allowing grantees to create learning patterns as an alternative to some of their other reporting requiremetns, and in general to learn more, fail better, share alike and measure impact.

# More info

## Design patterns

en.wikipedia.org/wiki/Design_pattern

## Learning patterns

meta.wikimedia.org/wiki/Evaluation_portal/Library/Learing_patterns

## Blog

blog.wikimedia.org/2013/11/19/learning-patterns-new-way-share-important-lessons/

And here are some places you can go if you want more information. Thanks! Do we have time for questions?

Learning patterns [edit]

## Gender identity [edit]

### Gender identity

The traditional way of asking someone gender is either insensitive to transgender and gender non-conforming people, or does not capture the information you are seeking.

LAST UPDATED: 05 DECEMBER 2013

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## Afterparty [edit]

### Afterparty

People like to have some time to socialize with one another after a long day of events.

LAST UPDATED: 04 DECEMBER 2013

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## Icebreaker [edit]

### Icebreaker

You want to make the people attending your event relaxed, excited, and ready to work together.