

Retrospective: **Global Metrics**

Wikimedia Conference 2016
Sati Houston & Jaime Anstee (WMF)

Who we are



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Agenda

- Retrospective: Executive Summary, History
- Retrospective: Community Feedback
 - Use cases, Benefits, Issues
- What's next for Global Metrics?

Retrospective:
Executive Summary, History

Key questions

1. What was the **problem** Global Metrics was intended to solve?
2. Why was Global Metrics the **chosen solution**?
3. Who does Global Metrics **serve today**?

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Intention:

- Give a high-level view of grant-related outcomes.
- Ensure accountability.
- Balance the need for data with the burden to volunteers.

Key questions

1. What was the **problem** Global Metrics was intended to solve?
2. Why was Global Metrics the **chosen solution**?

Reality:

- + High-level view of *certain* outcomes
- Many issues; some anticipated, some unexpected.
- Used in ways it was not designed to support

Key questions

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3. Who does Global Metrics **serve today**?

Intention: Everyone. In understanding outcomes.

Key questions

1. What was the **problem** Global Metrics was intended to solve?
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3. Who does Global Metrics **serve today**?

Intention: Everyone

Reality: Everyone, but...

WMF Strategic priorities *should not*
serve as the final framework for
understanding movement outcomes

**Discuss and understand
“What is impact?” *broadly***

Building capacity takes *a long time*. It takes continuous attention and iteration

Retrospective: **Community feedback**

Retrospective: Community feedback
Use Cases & Benefits

Planning and refining goals & activities

Generally reviewing grant proposals

Understanding cost-benefit ratio

Trying to make comparisons between grants

Recognizing anomalies

Communicating with outside partners

Setting strategy or annual plan

Understanding outcomes

Reporting unrelated to a WMF grant

Allocating resources

Reporting to WMF

Understanding achievement against goals

Spectrum of success in using the metric

Global Metrics is **useful** in

**Understanding
outcomes**

*By: Grantees, Committee
members, WMF staff*

Global Metrics is **sometimes useful** in

Planning and refining
goals & activities

By: Grantees

Global Metrics is **useful
in limited cases** in

Making comparisons
between grants

*By: Committee members,
WMF staff*

Benefit: Increased understanding of impact

**3 times the number
of participants**



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Benefit: Increased understanding of impact



**1.5 times the number of
new images uploaded**

**3 times the proportion
of new images added
to articles**

Benefit: Increased understanding of impact

2 times the number of pages created or improved

Special page

Recent changes

Track the most recent changes to the wiki on this page.

- (diff | hist) . . File:Vladimir Putin 30 July 2000-2.jpg; 20:27 . . (+3) . . Jahobr (talk | contribs) (*Cat-a-lot: Vladimir Putin 30 July 2000-2.jpg*)
- (diff | hist) . . File:Vladimir Putin 30 July 2000-4.jpg; 20:27 . . (+3) . . Jahobr (talk | contribs) (*Cat-a-lot: Vladimir Putin 30 July 2000-4.jpg*)
- (diff | hist) . . File:Vladimir Putin 30 July 2000-5.jpg; 20:27 . . (+3) . . Jahobr (talk | contribs) (*Cat-a-lot: Vladimir Putin 30 July 2000-5.jpg*)
- (Upload log); 20:27 . . Judgefloro (talk | contribs) uploaded File:0411jfHighway Churches Pangasinan I created page with UploadWizard)
- (Upload log); 20:27 . . Judgefloro (talk | contribs) uploaded File:0411jfHighway Churches Pangasinan I created page with UploadWizard)
- (diff | hist) . . m File:Clappova hrušeň.JPG; 20:27 . . (-19) . . Vojtěch Dostál (talk | contribs) (*added Category:Clappova hrušeň.JPG*)
- (Upload log); 20:27 . . Judgefloro (talk | contribs) uploaded File:0411jfHighway Churches Pangasinan I created page with UploadWizard)
- (diff | hist) . . File:Банер"Стоптерор" n.jpg; 20:27 . . (+25) . . Stas000D (talk | contribs) (*Category:Стоптерор*)
- (diff | hist) . . m File:WT8 003.jpg; 20:27 . . (-16) . . DanTD (talk | contribs) (*added Category:Racing motorcycles*)
- (diff | hist) . . File:Most common surnames in the United States by state.svg; 20:27 . . (+88) . . MB298 (talk | contribs) (*added Category:Most common surnames in the United States by state*)
- (diff | hist) . . m File:宏迪大酒店对面的国美电器 - panoramio.jpg; 20:27 . . (-33) . . Kalbbes (talk | contribs) (*removed Category:宏迪大酒店对面的国美电器 - panoramio.jpg*)
- (diff | hist) . . m File:Soest De Lytse Melm5.JPG; 20:27 . . (+43) . . Bardenoki (talk | contribs) (*+rmid re-added Category:Rijksmonumenten in Soest, Netherlands using HotCat*)
- (diff | hist) . . m File:Mexico1980-140 hg.jpg; 20:27 . . (+5) . . Infrogmation (talk | contribs) (*removed Category:Mexico1980-140 hg.jpg using HotCat*)
- (diff | hist) . . m File:Shanghai Museum 2006 17-49.jpg; 20:27 . . (-6) . . G41rn8 (talk | contribs) (*removed Category:Statues of Guanyin in China using HotCat*)

Spectrum of success in using the metric

Global Metrics is **useful** in

**Understanding
outcomes**

*By: Grantees, Committee
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Planning and refining
goals & activities

By: Grantees

Global Metrics is **useful
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Making comparisons
between grants

*By: Committee members,
WMF staff*

Benefit: Ability to make decisions about programs

Most metrics are **useful for measuring direct program outputs** but measuring **“impact” needs additional support**

“**Mainly used in reporting outputs**; in Europe we are used to using logic models and so it’s confusing to use Global Metrics to talk about “impact”. As this is actually data that only gives output of an event/project. **To talk about outcomes and impact more flesh needs to be added to raw data** (which storytelling approach somewhat actually does).”

Targeting future participants:

“We have a better sense of who participates or can participate in our activities.”

“Useful to follow up their involvement ... where did the new editors participate, we invite them again to similar activities”

Allocating resources to programs:

“Basically selected projects on how they could give the biggest numbers.”

“GM allows us to more easily say no to volunteers that will not be impactful but require a lot of staff time. Expectation for demonstrated impact.”

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Interlude: Questions so far?

Retrospective: Community feedback **Issues**

Outputs not outcomes
Wikimetrics
Time-frame too short to see outcomes
Data lacks context
De-emphasizes other metrics & outcomes
Deciding what should be included or excluded
Missing other outcomes
Unclear how data will be used
Volunteer awareness / interest
Internal Wikimedia movement view
Doesn't reflect the effort to create an entry
Unclear when applicable
Aggregation across different projects and programs
Inconsistent definition of metrics
Privacy
Burden of collection falls to volunteers or staff
Hard to collect data
Data doesn't reflect quality of contribution
Doesn't reflect program design or goals or learning
No support for other tools

But many of the issues can be grouped into three areas

How the metrics are defined

Inconsistent definitions

Aggregation of data

How the data is collected

**Tools, including
Wikimetrics**

Burden of collecting data

Attribution of outcomes
(Deciding what is included or excluded)

Outcomes that are missing

Retention

**Capturing different types of
contribution**

Partnerships

Issues related to the definition of metrics

Definitions are **open to interpretation and thus inconsistent**, especially for “Individuals involved” and “Articles”

“I think [Individuals Involved] is the weakest of the remaining Global Metrics. **You could never find a universal definition of whom to count and whom not to count.** ...And I didn't mention online-only individuals yet.”

- Anonymous survey respondent

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Aggregation of data leads to a **loss of context** and **dilutes the value** of the aggregated data

“Aside from Bytes... [Global Metrics] is helpful for comparative purposes but **as they are aggregated across different projects and wikis it is less useful** [for] making comparisons between applicants. **Due to this aggregation of data to be not useful at the annual plan level.**”

- User:Wittylama, FDC member

Issues related to the collection of data

Collecting Global Metrics is really difficult

“[We] only use and track [Global Metrics] 50% of the time because **some of the metrics are hard to track from offline to online.**”

- User:Ravidreams

So many tools with limited support for existing tools

Attribution of outcomes

Deciding what should be included or excluded

Issues related to the collection of data

Collecting Global Metrics is
really difficult

**So many tools with limited
support** for existing tools

Attribution of outcomes
Deciding what should be included
or excluded

“Not being able to collect all the metrics in one place (one has to use Wikimetrics, GLAMorous, Quarry...) is a **huge waste of time and energy**. The **tooling of these mandatory global metrics looks like it was an afterthought** and was never quite really finished.

- Anonymous survey response

Issues related to the collection of data

Collecting Global Metrics is
really difficult

**So many tools with limited
support** for existing tools

Attribution of outcomes
Deciding what should be included
or excluded

“The metrics are open to interpretation, and so [our chapter] has **needed strick rules for what should be included or excluded.** [This definition] ... isn't the same for all organizations and projects.”

- Anonymous survey response

Issues related to the collection of data

Collecting Global
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**So many tools with
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**Attribution of
outcomes**



Issues related to the collection of data

Collecting Global Metrics is **really difficult**

So many tools with limited support for existing tools

Attribution of outcomes

Burden of collecting data fall on **volunteers and grantee staff**

“Given a large number of volunteer-led projects per year (400 - 600 activities supported by WMDE per year) **Global Metrics do place a substantial burden on volunteers in terms of reporting requirements** etc.”

- WMDE Partnership and Development Team

“[We roughly estimate that] staff are spending about **.5 FTEs out 3-3.5 FTEs** on Global Metrics.”

- Anonymized interviewee



Interlude: Questions so far?

What's next?

How do we make Global Metrics more useful, more productive, more effective for you? **We need your help.**

Global Metrics: **Design session**

Wikimedia Conference 2016

How do we make Global Metrics more useful, more productive, more effective for you? **We need your help.**

Missing outcomes

Improving resources

What we want to achieve with the next iteration

1. **Strike a balance** between flexibility and consistency

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2. **Be relevant** to the grantee goals & objectives
3. **Support accountability**, e.g.
 - a. Wikimedia Foundation → Donors
 - b. Grantees → Wikimedia Foundation

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1. **Strike a balance** between flexibility and consistency
2. **Be relevant** to the grantee goals & objectives
3. **Support accountability**, e.g.
 - a. Wikimedia Foundation → Donors
 - b. Grantees → Wikimedia Foundation
4. **Ease community burden**