Global Metrics Tutorial
Before we begin

1. Very limited time!
2. Signals
This Session

Overview

Global Metrics

Planning

Tools

Resources
Overview

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Tools

Resources
What is the impact of Wikimedia?

What are we doing and how much?

What works? What needs improvement?
Measures of success and Wikimedia

- Community
- Partnerships
- Active editors
- Event
- Images
- Diversity
- Participants
- Bot development
- Content
- Gender
- Editor retention
- Articles created
- Talk pages
- Organizers
- Active Editors
- New users
- Categories
- Templates
From Measures to **Global Metrics**

- Examined grants and reports from 2 years
- **Standardizing and tracking 7 key measures of progress**, related to strategic goals for the foundation
- A start to using metrics to *advance* and *learn* from our work
- Required reporting for any grantee receiving funds through IEG, PEG, or APG
What is a Metric?

University graduation rate → Tells you how many completed university

Full-time employment rate → Tells you how many work 30+ hours per week

Total Population of Berlin → Tells you how many residents are in Berlin

A metric is a standardized measure so that if person A sees the metric and person B sees the metric, they understand it as the same thing.
Global Metrics ARE...

- Anchors that align with WMF strategic goals about content and participation only
- A way to gauge overall outputs for grants
- Consistent measures to be able to make summative statements:

So far this year, the total number of users influenced by the PEG program is 1,060 users, where 633 (60%) were New users.
Global Metrics ARE NOT...

- The only metrics -- *Necessary, but insufficient!* *Share other metrics*
- The *best measures of success* for most projects -- *there are no good or bad results!*
- To be considered in isolation -- *context is key*
A starting point...

Global metrics...

- Do not account for quality, retention. Missing other strategic priority of awareness
- Do not cover the right metrics for all types of grants
- Will likely change over time
6 quantitative metrics related to *activity outputs/outcomes*

<table>
<thead>
<tr>
<th>3 for Participation</th>
<th>3 for Content</th>
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1 qualitative metric related to *short-term outcomes*

**Learning question:** *Did your work increase the motivation of contributors, and how do you know?*
Participation Metrics

Number of...

- Newly Registered Users: Newly registered users as a result of the project, using a two week window before the event.
- Existing Active Editors: Existing active editors (5+ edits in previous month) involved at any capacity (planning, executing, participating) during the project duration.
- Individuals Involved: All people participating in the project (organizers, users, attendees, judges, developers, etc.)
Participation Metrics

- **2 weeks**
  - Newly Registered

- **30 days**
  - Existing Active Editors

**Individuals Involved**
Participation Metrics

What activities or programs that you work on would these participation metrics be…

...very relevant?

...not very relevant?

Global Metrics

- Newly Registered Users
- Existing Active Editors
- Individuals Involved
**Content Metrics**

Number of...

- **Images or media *used* in Wikimedia projects**
  - Images uploaded to Commons that are also added to Wikipedia or other Wikimedia projects

- **Articles created or improved on Wikimedia projects**
  - The number of articles that were created or improved on Wikimedia projects as a result of the program efforts

- **Bytes added to and/or deleted from Wikimedia projects**
  - $|\text{Bytes Added}| + |\text{Bytes removed}| = \text{Total Bytes}$

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**Global Metrics**
Content

What activities or programs that you work on would these content metrics be…

...very relevant?

...not very relevant?

Global Metrics

- Media in Commons *used* in Wikimedia projects
- Articles created or improved on Wikimedia projects
- Bytes added to and/or deleted from Wikimedia projects
Learning Question

Did your work increase the motivation of contributors

and

how do you know?
Learning Question

Why is motivation important in the work that you do?

What do you think motivates participants?

(think about what motivates you!)
What **other measures** are important for your program or activities?

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Learning question
Overview

Global Metrics

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Process

- **Plan early** -- *take learning time into consideration*

- **Know the measures you need** -- *not just Global Metrics!*

- **Prepare for tracking progress** -- *especially if you are doing more than one project or event*

- **Use the Learning Patterns:** [Calculating Global Metrics] -- *the main place for planning Global metrics*
The Essential Information

- **Start and End times and time zone of event** -- *some tools require UTC*

- **Usernames** -- *permission to get data*

- **List of articles edited** -- *some tools only measure articles created, no improved*

- **Categories** -- *used for media events, have a plan for promoting the category*
Usernames and Privacy

- With usernames, you can typically use Wikimetrics or Quarry
- You can use Quarry to find usernames

- Requesting permission
  - On-wiki (Public)
    - Add an opt-out clause
  - Off-wiki (e.g. registration through google form) or in-person
    - Participants must opt-in, asking permission to run username through wikimetrics.
    - Resources for forms

- Sensitive information - Do not ask for sensitive personal information (Gender, race, age, and name) using the same form that asks for username. (more info link)
Types of Tools

- **Wikimedia database** (i.e. Labs)
- **Self-report** (i.e. Surveys)
- **Direct Observation**
# Wikimetrics

**Global Metric**

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**Requirements**

- Usernames
- Start/End times in UTC
- Ensuring you have consent

**Additional Skills**

- Understanding how to use Wikimetrics

**Resources**

- Wikimetrics tutorial -- review this early
- Global metrics learning patterns
- Consent forms

[metrics.wmflabs.org]
Education Extension

Extension:Education_Program

Acts like an event page, records usernames

Requirements
● Extension available in Wikimedia project

Additional Skills
● Understanding how to use the Extension

Resources
● Education extension learning pattern
GLAMorous

tools.wmflabs.org/glamtools/glamorous.php

Requirements
- Category in Wikimedia Commons specific for your project

Additional Skills
- Understanding how to use Wikimetrics

Resources
- How to create a category in commons
- Pre-selected category link
- Sample how to promote use of commons category
- Learning pattern
Other Database Tools

Quarry
● Requires knowing MySQL
● Some queries can be prepared for you, and you just need to change parameters
● We will be working to provide support for this resource
● MediaWiki Database
● Coursera SQL course

Bots
● Requires knowing a lot about tech!
● Resources:
Event Page on Wiki

Requirements
● None

Additional Skills
● Creating a page in the correct namespace (typically Wikipedia namespace)

Sample event pages
Surveys

Requirements
- Survey instrument (online or offline)
- Registration services count (e.g. eventbrite)

Additional Skills
- Practice writing effective questions

Resources
- Learning pattern: Learning question
- Question bank
- L&E team happy to review your survey email with 2 weeks notice (eval@wikimedia.org)
Ask the room

Requirements
- In-person event
- Prepared questions

Resources
- Learning pattern: Learning question
- Question bank

Global Metric
- Newly Registered Users
- Existing Active Editors
- Individuals Involved
- Learning question

Self-report Tools
- Newly Registered Users
- Existing Active Editors
- Individuals Involved
- Learning question
Direct Observation

**Global Metric**
- Newly Registered Users
- Existing Active Editors
- Individuals Involved
- Media used in Wikimedia projects
- Articles created or improved
- Bytes added to and/or deleted
- Learning question

**Requirements**
- Using your eyes, ears, and judgement to make general observations
- *Should only be used if other tools cannot be used*
Your Tool?

Many tools can be used for capturing global metrics. Reach out to L&E (eval@wikimedia.org) if you have questions.

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Overview

Global Metrics

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Additional Resources for...

- Global Metrics
- Other Metrics
- Both
Global Metrics Learning Patterns

Calculating Global Metrics

1. Number of newly registered users
2. Number of active editors involved
3. Number of individuals involved
4. Number of articles created or improved in Wikimedia projects
5. Number of images or media used in Wikimedia projects
6. Number of bytes added and removed from Wikimedia projects
7. Learning question: Did your work increase the motivation of contributors, and how do you know?
Resources for Other Metrics
**Recommended for Global Metrics**

**Planning**
- Logic models
- **Tracking and reporting toolkit**
- Program resources and toolkits

**Exploring measures**
- Measures for Evaluation
- Evaluation reports
- **Question bank**
- Grant reports

**Tools**
- Quarry
- MediaWiki Database
- GLAM tools
- CATscan