

Seeding Engagement and Cultivating Volunteers through Crowdsourcing

Learning from Experiences with the
Smithsonian Transcription Center

Connecting to Collections Care - 07 July 2016

Dr. Meghan Ferriter – ferriterm@si.edu

FEATURED

NATIONAL NUMISMATICS COLLECTION

[VIEW PROJECTS](#)


JOIN US!

LEARN HOW TO TRANSCRIBE

Become a Smithsonian Digital Volunteer and help us make historical documents and biodiversity data more accessible.

Join 6,615 volunteers to add more to the total 185,956 pages of field notes, diaries, ledgers, logbooks, currency proof sheets, photo albums, manuscripts, biodiversity

BROWSE PROJECTS


Select a category below to begin browsing projects.

PROOF POSITIVE: TENNESSEE

Tennessee: Certified Proofs (Box 1)

263 CONTRIBUTIONS

LATEST UPDATES

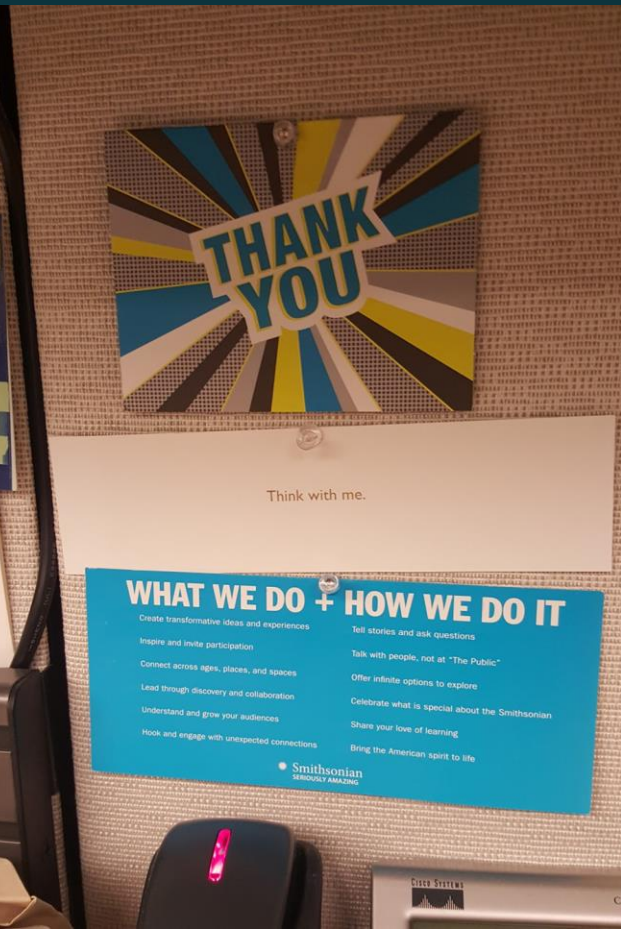
 andk reviewed a page from G. Arthur Cooper - Field Notes, 1931-1955

 Wizzywitch transcribed a page from G. Arthur Cooper - Field Notes, 1931-1955

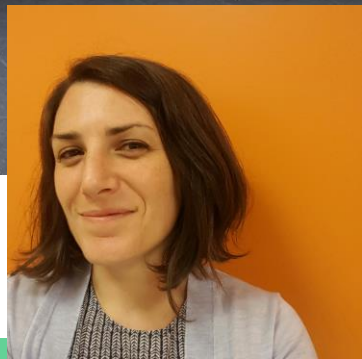
 RDMartin35 marked for review a page from USNM Curators Annual Report - Foods and Textiles, 1885

 andk marked for review a page from G.

Hello!



Dr. Meghan Ferriter
@meghaninmotion



Today's Talk

- Crowdsourcing
- Engagement
- Transcription
- Selecting Approaches
- Applying Approaches
- Results & Tips

CROWDSOURCING

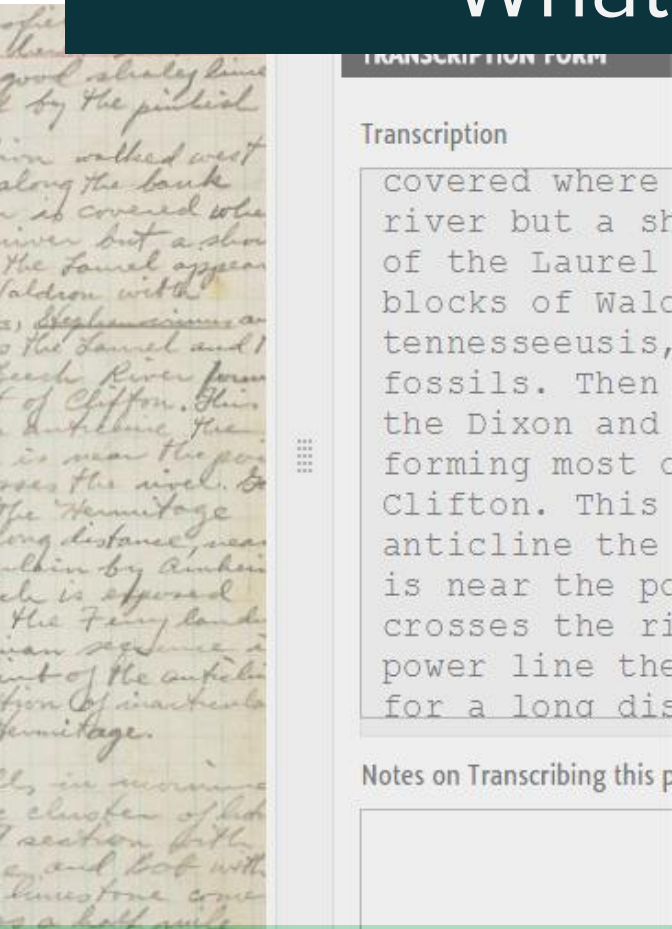


What is Crowdsourcing?

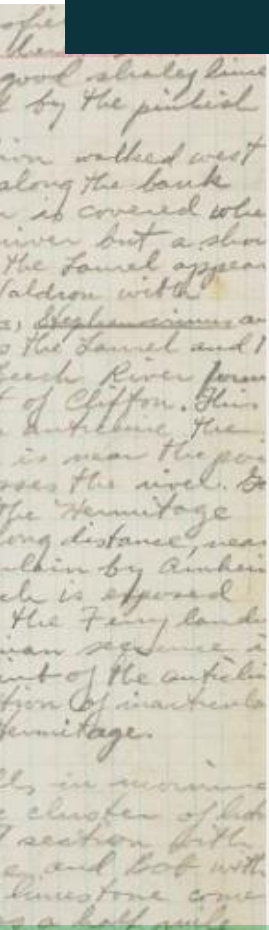
Crowdsourcing is

“A form of engagement with cultural heritage that contributes toward a shared, significant goal or research area, by asking the public to undertake tasks that cannot be done automatically, in an environment where the tasks, goals (or both) provide inherent rewards for participation.”

(Mia Ridge, 2013, p. 437)



What else is Crowdsourcing?



TRANSCRIPTION FORM

Transcription

covered where
river but a sh
of the Laurel
blocks of Walc
tennesseensis,
fossils. Then
the Dixon and
forming most c
Clifton. This
anticline the
is near the po
crosses the ri
power line the
for a long dis

Notes on Transcribing this p

Crowdsourcing, in our model:

- Respects & Rewards Contributions
- Builds on the amazing work of staff
- Creates data that requires careful management
- Opens new opportunities for research & learning
- Requires flexibility, creativity, and iteration

Determining Need & Defining Goals

The (first) Goal = Indexed, searchable text

- But also: Showcasing collections
- As well as: Metadata for new collections records

And objectives evolved:

- Engaging audiences
- Learning (& Sharing)

Determining Need & Defining Goals

The (first) Goal = Indexed, searchable text

- But also: Showcasing collections
- As well as: Metadata for new collections records

And objectives evolved:

- Engaging audiences
- Learning (& Sharing)

These Goals inform
Flexible Design of Site -
and just as importantly,
Engagement Approaches!

TRANSCRIPTION



G.A. Sandhouse

Winchester, Va.,
May 17, 1936.
G. A. Sandhouse.

^{to OP}
Bombus affinis Cresson
Det. by S. CZARNIK

UIUC USDA BBDP

012776

USNM ENT



00835952

Smithsonian Transcription Center: How does it work?

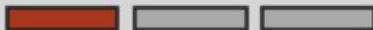
- Peer-review Process: Transcribe - Review - Approve
- Anyone can Transcribe
 - Anywhere - Around the world - At any time
- Volunteers must register to Review
- A final pass by Smithsonian staff for Approval

Smithsonian Transcription Center: How does it work?

(1) Transcribe



Volunteer(s) work together to transcribe document. When finished, can request review.



(2) Review



A new volunteer reviews transcription. Can approve or send back to (1) for more edits.

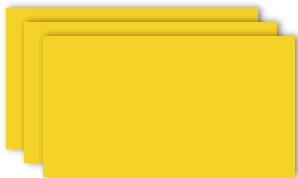


(3) Approve



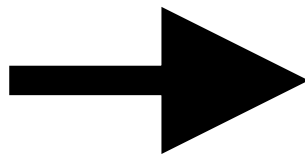
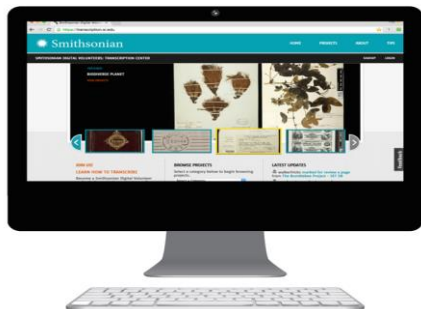
Smithsonian staff approves transcription or sends back to (1) for more edits





Item
or Collection

Ideally with:
1. EDAN ID
2. DAMS images



Product

- A. Text indexed in EDAN
- B. PDF (from JSON)
- C. Customized CSV
- D. XML



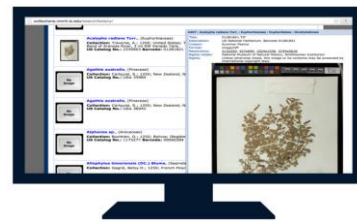
Databases

&



Collections Search Center

&

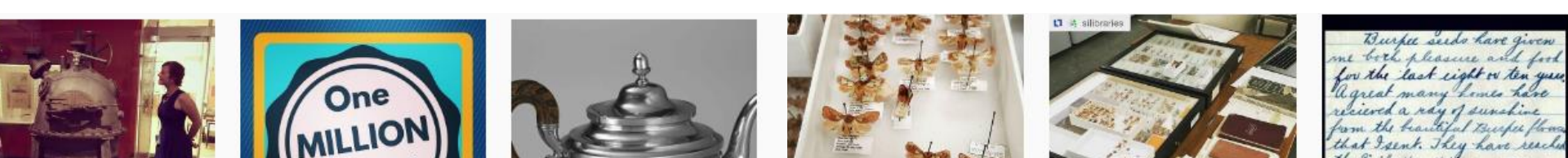


Unit Websites

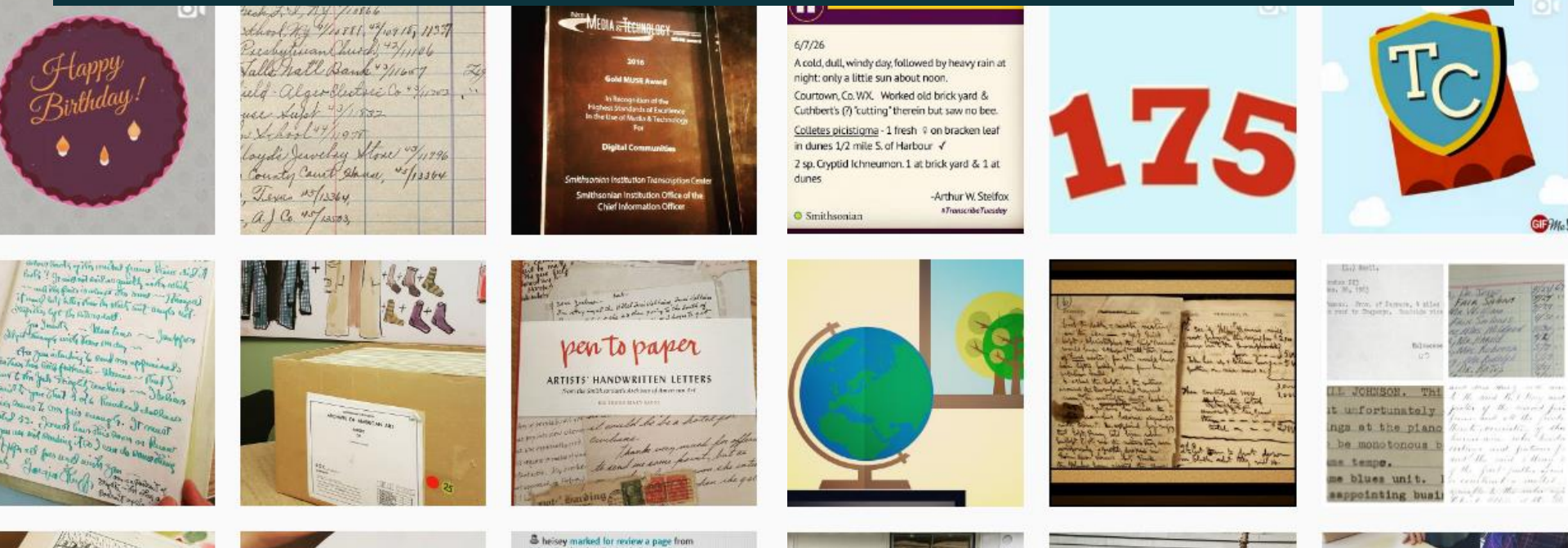
“Crowdsourcing”: Transcription Activity

Transcription Center tasks include:

- Manuscript (narrative) transcription
- Record Creation
- Specific form data population
- Geolocation
- Communication to peers & staff
- Translation + Interpretation
- Optional: Self-Guided Learning



ENGAGEMENT



Engagement

Many approaches, many metrics:

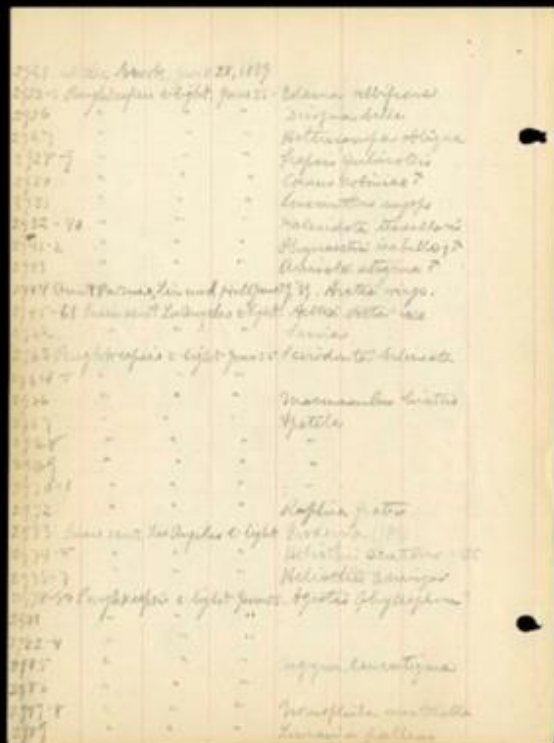
- Collective Communication
- Enthusiastic Interaction
- Genuine Curiosity
- Empathy + Support
- Open Problem-Solving
- Authentic

Engagement

Many Pathways, Many Tools:

- Welcome Registration E-mail
- Homepage
- Direct E-mails (Feedback, Qs, Account Support)
- Campaign E-mails
- Social Media: Twitter, Facebook, Tumblr, Instagram, YouTube
- Google+ Hangouts

Field Notes, Diaries, Manuscripts, & More



Please review the transcription below. If it needs further editing click "Reopen for Editing." If everything looks OK click "Mark as Complete."

TRANSCRIPTION FORM

INSTRUCTIONS

Transcription

2922-5 Poughkeepsie e-light, June 25 "
[[ditto for: 1889]] Edema albifrons
2926 " " " [[ditto for: Poughkeepsie
e-light, June 25 1889]] Deiopeia bella
2927 " " " [[ditto for: Poughkeepsie
e-light, June 25 1889]] Heterocampa obliqua
2928-9 " " " [[ditto for: Poughkeepsie
e-light, June 25 1889]] Scepsis fulvicollis
2930 " " " [[ditto for: Poughkeepsie

Notes on Transcribing this page (optional)

Apparent "Marmasulus" (line 2966) may be a misspelling of "Marasmalus".

Metadata: Bees, Botany, & Proofs



TRANSCRIPTION FORM

[HELP](#)

1) Collector Details

2) Locality Details

3) Specimen Details

Verbatim Locality

Country

State

District / County

Precise Locality

Elevation (from)

Elevation (to)

Elevation Unit

Longitude

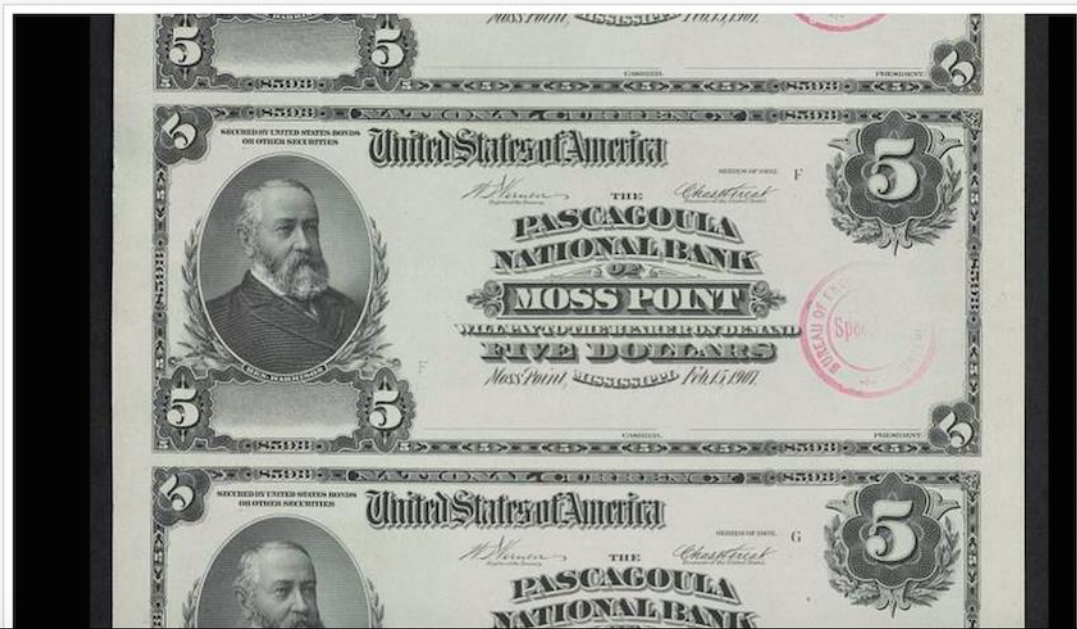
Latitude

feedback

Metadata: Bees, Botany, & Proofs

HOME > PROJECTS > NATIONAL MUSEUM OF AMERICAN HISTORY > CERTIFIED PROOFS OF MISSISSIPPI (BOX 2)

TRANSCRIBE PAGE 30 OF 90



This transcription is completed and pending approval.

TRANSCRIPTION FORM

INSTRUCTIONS

1) Bank Details

2) Signatures

3) Note Details

Bank Name Pascagoula National Bank of Moss P

Secured By with bonds and/or other securities

Place Mississippi

City Moss Point

Plate Date 1907-02-15

Notes on Transcribing this page (optional)

feedback

Logbooks, Lists, & Ledgers

166

INSTRUMENT, *2377777777*

DATE, *Tuesday March 3 1908*

No.	Class	Object	R. A.	Dec.	Start	Obs. H. A.	Obs. Dec.	Tab. R. or W.	Lead	Focus	Prisms	Exp.	Sky at Start	Stop	Clamp. Cl's	Down	Ref.	Obs'r.	REMARKS.
1237	L	Pole	—	—	7 46	1 31 E	+89.0	—	92	163	0	—	2 K1W	9 43	2 0	—	K		Tested focus vis found 1.1 h
238	L	Pole	—	—	10 50	0 30 E	+89.0	—	92	163	0	—	Hebby	11 00	?	—	X 28		Good images.
239	L	Pole	—	—	11 05	0 27 E	+89.0	—	—	—	—	—	Hebby	11 17	?	—	X 28		X 238 hinge

=====

Please review the transcription below. If it needs further editing click "Reopen for Editing." If everything looks OK click "Mark as Complete."

TRANSCRIPTION FORM

INSTRUCTIONS

Log

Page	Plate	Class	Object	R.A.	Dec	Start	Obs H.A.	Obs Dec	Stop	Exp	Date	Miscellaneous
166	237	L	Pole			7 46	1 31 E	+89.0	9 43		Mar 03 1908	Tested focus visually. Found 1.1 rev. out, Bad images.
166	238	L	Pole			10 50	0 30 E	+89.0	11 00		Mar 03 1908	x 238 Hinge down RA not clamped.

Logbooks, Lists, & Ledgers

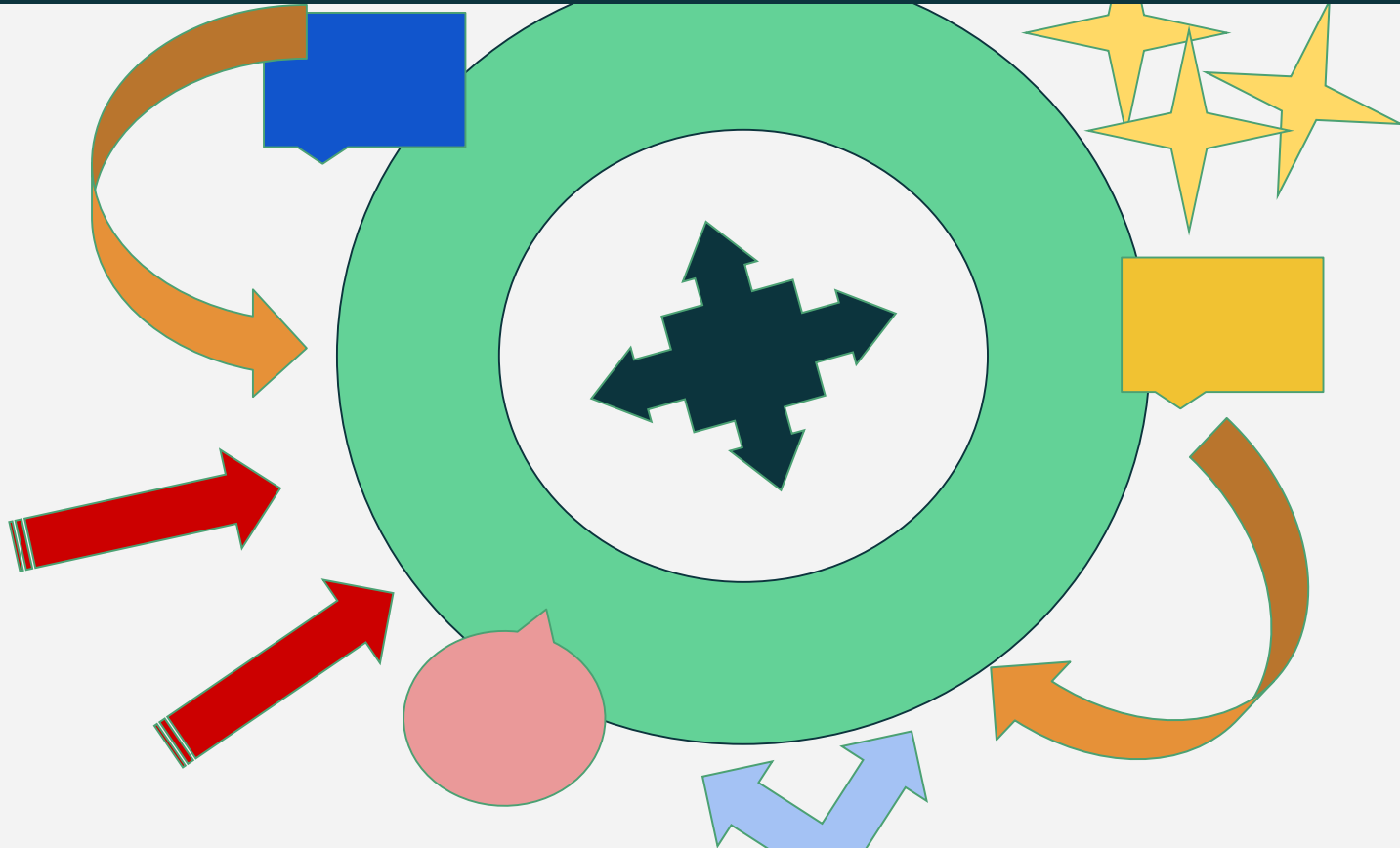


TPE-919-02-911-8		APOLLO STOWAGE LIST		IN TC 12-12-72 PAGE 19	
LIST A C4 LAUNCH STOWAGE LIST		MISSION J-3 CM 114 AND LM-12			
SEC 1 STOWED OPERATIONAL GFE					
ITEM NUMBER	PART NUMBER	NOMENCLATURE	STOWAGE LOCATION	UNIT WEIGHT	QTY/SC
C 0112.27	SHB42100121-203	HARNESS AXILLARY			1
C 0112.29	SEB42100123-201	PILLS, SLEEPING			21
C 0112.32	SEB42100145-201	ANAESTHETIC, EYEDROP, OPHTHAINE			1
C 0112.33	SEB42100146-201	NOSE DROPS, AFRIN			3
C 0112.34	RMK 101	TABLETS, TETRACYCLINE			60

Log

Page	List	Section	Item #	Part #	Nomen	StowLoc	Unit Wt	QTY/SC	Change Date	Change Reason
19	A	1	C0112.27	SHB42100121-203	HARNESS, AXILLARY			1		
19	A	1	C0112.29	SEB42100123-201	PILLS, SLEEPING			21		
19	A	1	C0112.32	SEB42100145-201	ANAESTHETIC, EYEDROP, OPHTHAINE			1		
19	A	1	C0112.33	SEB42100146-201	NOSE DROPS, AFRIN			3		
19	A	1	C0112.34	RMK 101	TABLETS, TETRACYCLINE			60		
19	A	1	C0112.35	3518101	CAP, PROTECTIVE-CWG BIO HARNESS CONNECTOR			3		
19	A	1	C0112.36	24-0230-01	PACKAGE, SPONGE			14		
19	A	1	C0112.37	LOT A-2041	PROSTAPHLIN (300 MG)			28		

SELECTING APPROACHES



Learning from Participatory Projects

Why do people contribute their time?
Why should we consider their needs when
designing crowdsourcing projects &
engagement approaches?

TC Volunteer Motivations

INTRINSIC

EXTRINSIC

ALTRUISTIC

PRINCIPALISM

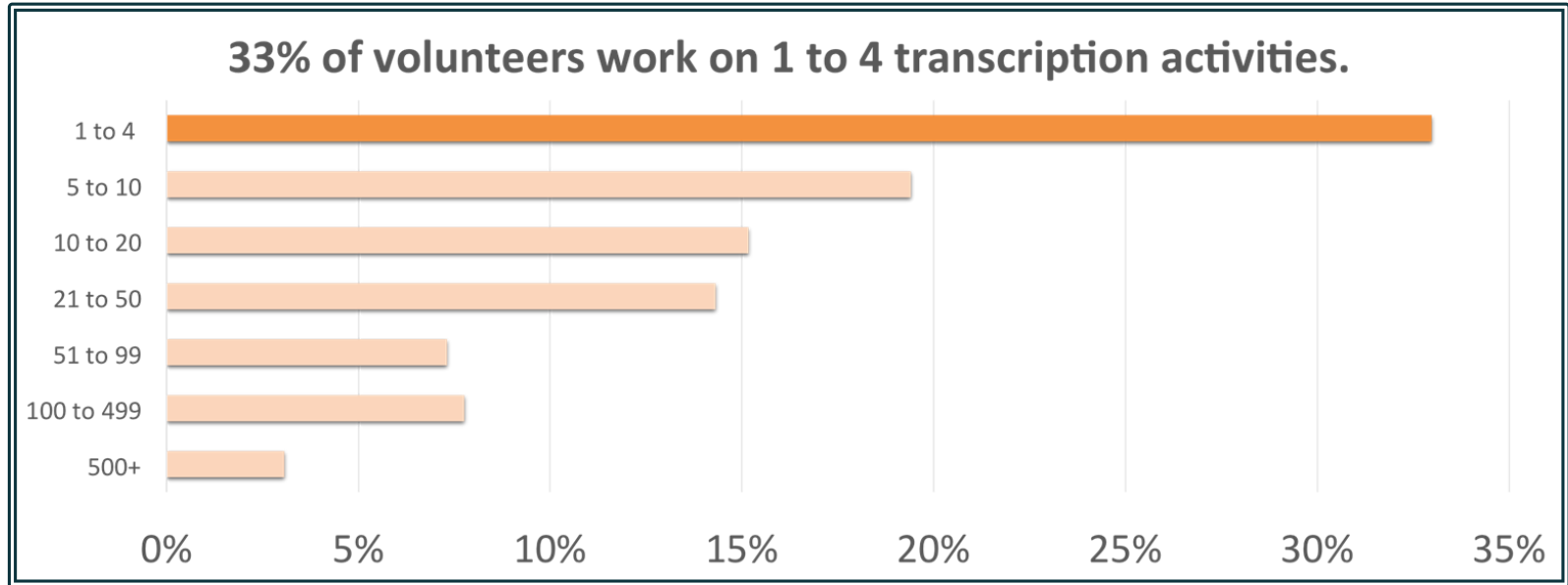
TC Volunteer Needs

- Communication & Updates
- Support (Instructions & Feedback)
- Mission or Objective
- Reasons to Conform
- Guidance
- Freedom
- Opportunities to Grow
- Time to Learn

TC Volunteers in Action

- On their schedule
- Ready for a challenge
- Varying, Choosing Adventure
- Tuesdays & Wednesdays; Forget the weekend
- Remote for a reason
- Committed but busy
- Passionately Curious
- Desire to Help

The TC Volunteer Lifecycle

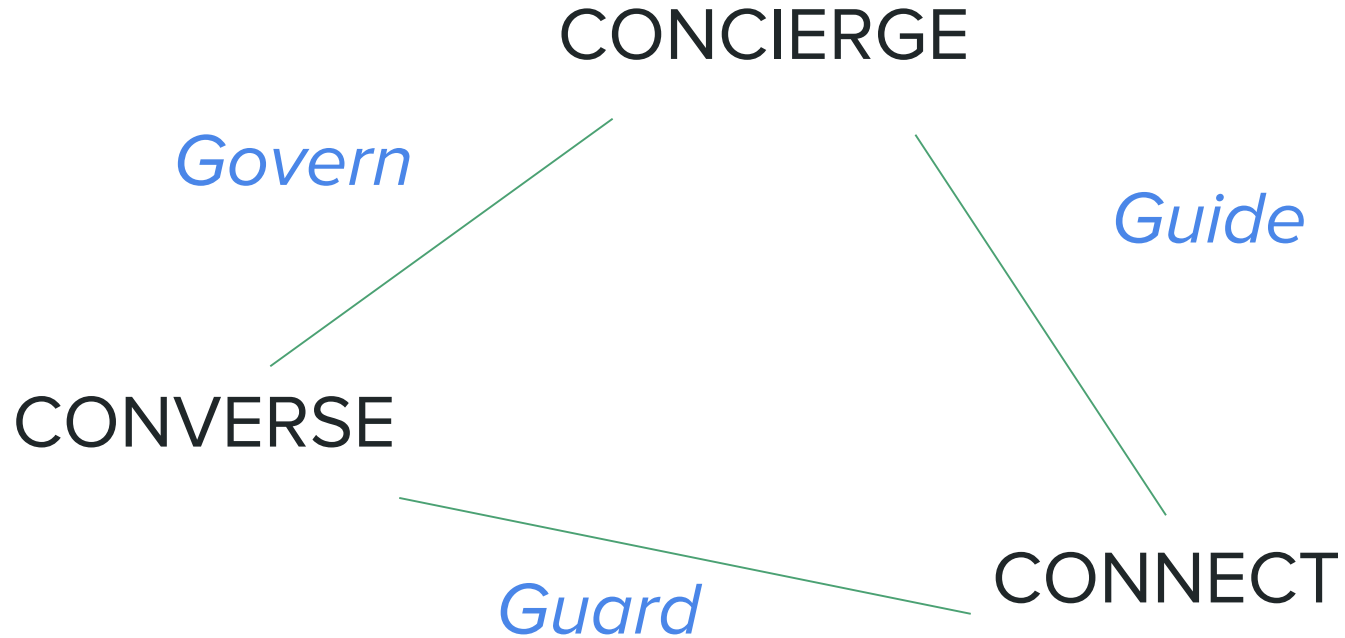


Design & Execution

With that information in mind, my approach is

- Purposeful
- Flexible
- Trust
- Serious Fun
- Care & Careful Listening
- Iterative
- Extensible

My Approaches



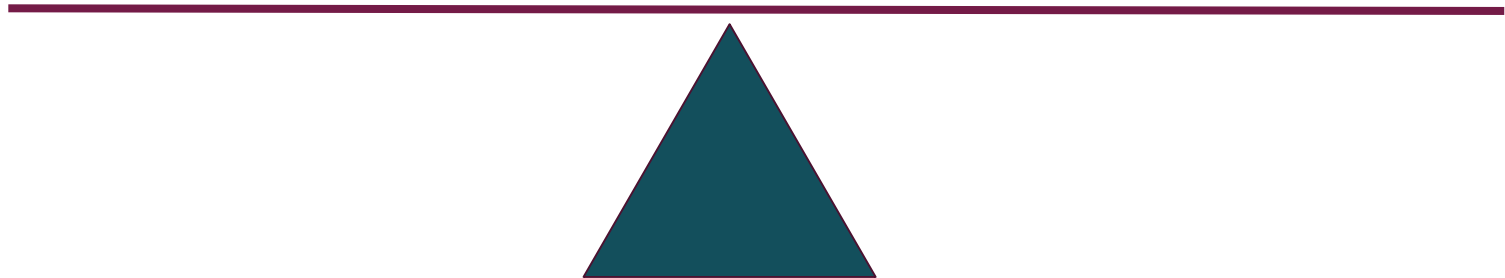
My Approaches

Authority

Authenticity

Accountability

Approachability



Risks to Manage

In crowdsourcing activities like transcription, it's important to carefully manage the following risks to success:






- Confusing or Changing Mission/Objective
- Complicated or Restrictive Workflows
- Limited Updates or Feedback
- Lack of clear plans to follow through with data
- Lack of plans for conclusion, scaling down
- Failing to plan communication & resourcing
- Being competitive or Shrouding results

Mitigating Failure

The potential for failure is higher in crowdsourcing when a project:

- Grows too quickly, Fails to Scale, or Expects “Absolutes”
- Shows Lack of concern for, Fails to think like Participants
- Does not provide Updates/Feedback
- Suffers from Inadequate Resourcing
- Fails to follow through with data
- Goes behind a paywall, after establishing expectations of access

APPLYING APPROACHES

8301	Burpee Seed Contest, 1924 - Box 330, Folder 10	No	No	Archives of American Gardens		Edit Project Manage Assets Review Transcriptions Export Project
8300	Burpee Seed Contest, 1924 - Box 330, Folder 9	No	No	Archives of American Gardens		Edit Project Manage Assets Review Transcriptions Export Project
8299	Burpee Seed Contest, 1924 - Box 330, Folder 8	No	No	Archives of American Gardens		Edit Project Manage Assets Review Transcriptions Export Project
8298	Burpee Seed Contest, 1924 - Box 330, Folder 7	Yes	Yes	Archives of American Gardens		Edit Project Manage Assets Review Transcriptions Export Project
		No	No	Freer Gallery of Art and Arthur		Edit Project Manage Assets Review

SMART Approaches

- Specific
- Measurable
- Achievable
- Realistic
- Time-bound



1. 7 Day Review Challenges
2. Coordinated Social Media Campaigns
3. WeDigBio
4. Contribute & Connect

Weekly-ish

1. TranscribeTuesday
2. FridayFinalLines
3. MyTCdiscovery



SI Transcription Ctr

@TranscribeSI

Dancing into the night seems a perfect set of [#FridayFinalLines](#)! Help review [@FreerSackler](#) transcription.si.edu/project/8287

”

Saturday, 13 March

I was in Clem Ruby's office, saw the box in a corner, coveted it, and asked Clem what he intended to do with it. Saying it was too bulky to pack he gave it to me. I tried to buy, but was unsuccessful, and bringing it home I quickly altered its insides to make it hold photograph books very well and decoratively.

Louise and Mears had supper with us. And then they went to a movie while the Ennises came over and went to the Peking Hotel and danced the rest of the night.

-Benjamin March, 1926

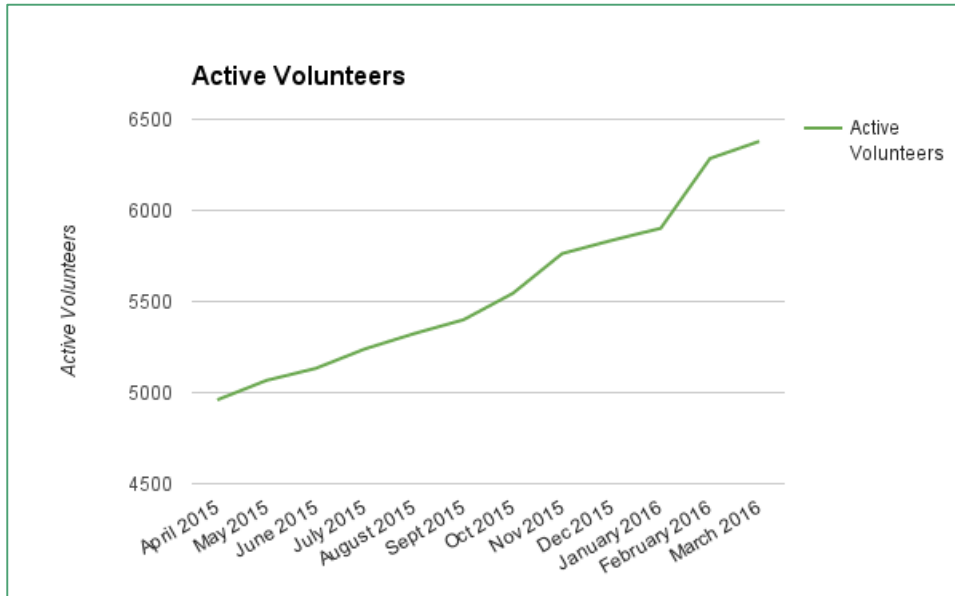


Smithsonian

[#FridayFinalLines](#)

Cumulative Growth

- Steady activity and release of projects
- Campaigns & Showcasing
- Being There



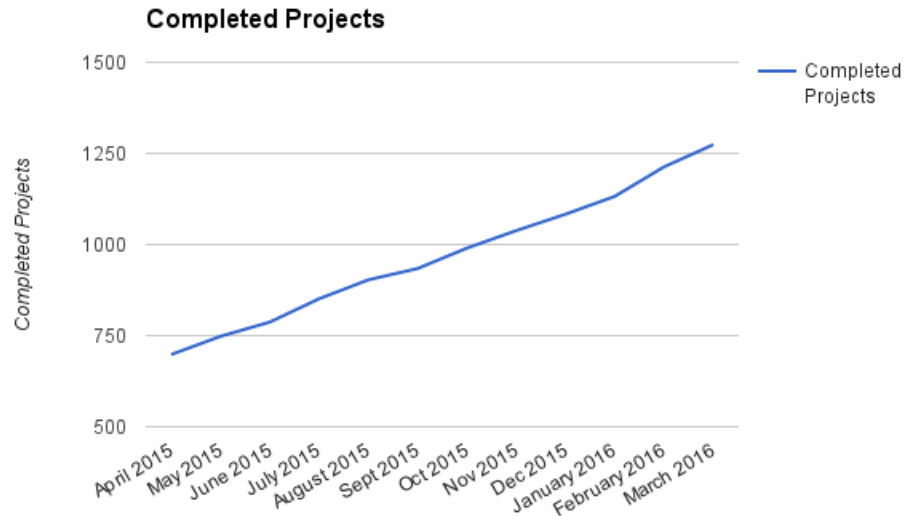
06 July
2016



Smithsonian Transcription
Center

Cumulative Growth

- Steady activity and release of projects
- Campaigns & Showcasing
- Being There



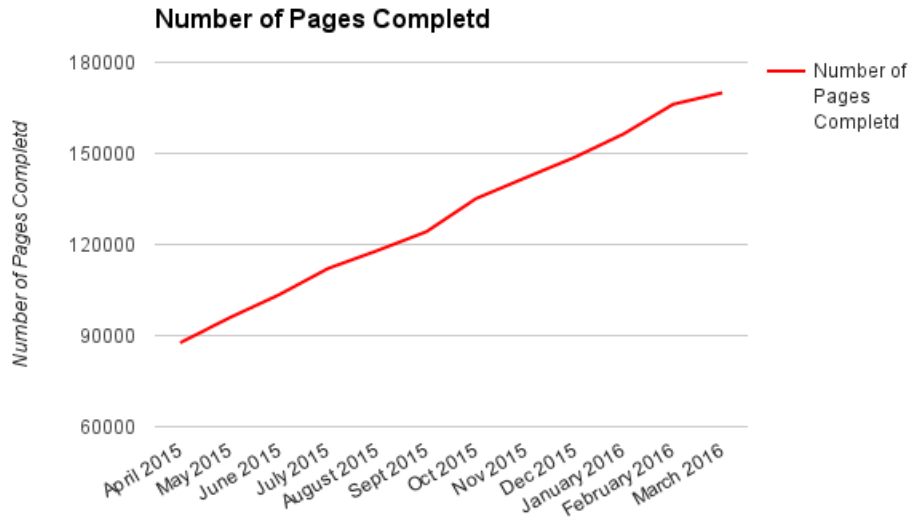
06 July
2016



Smithsonian Transcription
Center

Cumulative Growth

- Steady activity and release of projects
- Campaigns & Showcasing
- Being There



06 July
2016



Smithsonian Transcription
Center

Together Everyone Achieves More

a.k.a #WeLearnTogether

Digital Volunteers have transcribed and reviewed:

- 27,140 botanical specimens sheets labels
- 44,114 entomological specimens labels
- 39,165 National Numismatics Collection Certified Proofs
- 17,558 astronomical logbook pages

= metadata for **127,977 new collection records** +
detailed data for exploration of glass plate exposures

Places to Start

Considering a crowdsourcing project? Start here:

- Start small but think about scale
- Consider use, condition, content & context of Collection
- Assess! But selectively as measuring all is disruptive
- Accept & integrate participant
- Involve other staff as early as possible
- Test assumptions (& adjust!) & critique successes
- Prepare to pivot from failure - learn and iterate

Final Thoughts & Tips

- Be Intentional & Reflect on Practice
- Listen & Connect When Possible
- Advocate for Participants vs “a Crowd”
- Celebrate collective successes regularly & highlight the individual achievements of your team(s) when possible
- Embrace opportunities to learn & share with peers
- Pause occasionally, be patient, stay curious – and take it “Bird by Bird”

Thank you!

<https://transcription.si.edu>

Dr. Meghan Ferriter
@meghaninmotion
ferriterm@si.edu
@TranscribeSI

Additional Considerations

Digital Smithsonian Priorities

- *Enhance the in-person visitor experience*
- *Digitize the collections*
- *Make content easy to find & use*
- *Spark engagement and participation*

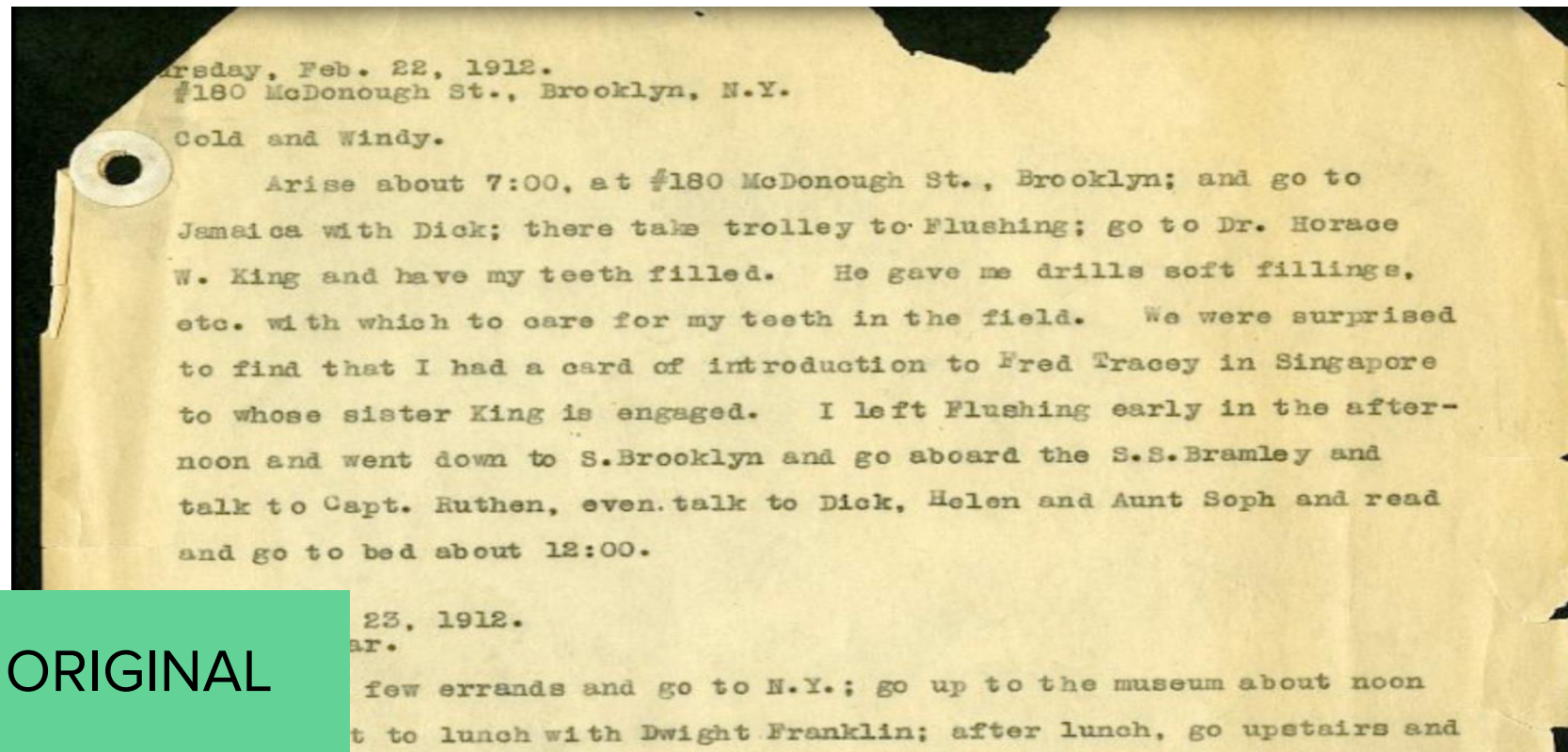
Ask Questions as Digitization Challenges Emerge



As collections are digitized and new avenues for access established, how can we:

- Improve and Increase the Quality of Engagement?
- Increase Access and Use of Resources?
- Create Pathways of Learning and New Knowledge?
- Maintain and Build Trust with Communities of Interest, Stakeholders, and Audiences?

Why Not Just OCR? A Raven Example



ORIGINAL

Why Not Just OCR? A Raven Example

Cold and Windy*

^riae about 7:00_t at #180 Me I) enough 3t* _f Brooklyn; and go to Jamaica
ulth]>iok; ther_a fate- trolley to' flushing! go to Ir* loimoe f * Ei«g and have
my teeth filled* 10 gave a© drills soft fillings* ©to* -wLth which to oare for
my teeth in the field*.. We were to find that I had a oard of introduction to
^red ^rsoey in to ^hos® Bister Xing is engaged* I 10 ft Plushi^g early ia the
after-* noon and went down to S* Brooklyn and go aboard the S»8*Brsmley and talk t
o ^apt* Hut hen, even, talk to Dick, Helen and Itint Soph and read and go to bed
about 12:00*

Iriday, 1^* 25_f Iil2*

.....
Cold* Clear*

^
x/ Do a few errands and go to H*Y*; go up to the museum about noon
anl go out to lunoh with Bwijpit franklin; after lunoh_t go upstairs aiid say good-
bye to Millar-, Dr* Dwight, Chapiaaii_t Molph/Elwyn & Miss \DS^ilii arson, & 1 feha
fellows in the department of preimratioii* Jiaava the museum about SsSO; (at
noon I saw Br* Bailey) _r go over to feool^yii and ohanga my clot has and return to
11*1*; Q*W* lldar_f Jr* gava a dinnar ma; have a good_s tiiaa; go up to 89th St*_t
aiA slaap with Butler from , S:30 to 7:00 A*M*_t S4th; have breakfast with
Butlar & go dcwn town, gat my oaroera oaae and go to iirooklyn_t try to gat hold
of anaxprass^ man_f but being unable to gat one _t I hurried ovar to tha S*S*
crfffioa and laarn©d that tha Bramlav would sail about noon on Monday: do

OCR Results

Why Not Just OCR? A Raven Example

[[start page]]

[[upper left-hand corner of page missing]] rsday, Feb. 22, 1912
#180 McDonough St., Brooklyn, N.Y.

Cold and Windy.

Arise about 7:00, at #180 McDonough St., Brooklyn; and go to Jamaica with Dick; there take trolley to Flushing; go to Dr. Horace W. King and have my teeth filled. He gave me drills soft fillings, etc. with which to care for my teeth in the field. We were surprised to find I had a card of introduction to Fred Tracey in Singapore to whose sister King is engaged. I left Flushing early in the afternoon and went down to S.Brooklyn and go aboard the S.S.Bramley and talk to Capt. Ruthen, even talk to Dick, Helen and Aunt Soph and read and go to bed about 12:00.

Friday, Feb. 23, 1912.

Cold, Clear.

Do a few errands and go to N.Y.; go up to the museum about noon and go out to lunch with Dwight Franklin; after lunch, go upstairs and say good-bye to Miller, Dr. Dwight, Chapman, Adolph Elwyn & Miss Dickerson, & the fellows in the department of preparation. Leave the museum about 3:30; (at noon I saw Dr. Bailey), go over to Brooklyn and change my clothes and return to N.Y.; G.W. Elder, Jr. gave a dinner for me; have a good time; go up to 89th St., and sleep with Butler from 5:30 to 7:00 A.M., 24th; have breakfast with Butler & go down town, get my camera case and go to Brooklyn, try to get hold of an express-man, but being unable to get one, I hurried over to the S.S. office and learned that Bramley would sail about noon on Monday; do several errands, call on Mrs. Franklin & come over to Aunt Soph's to lunch & talk to Aunt Elizabeth & May Belle; meet Geo. Elder & others at hotel Empire at 4:15 & ride in his auto up to New Rochelle and later return to City and have

Volunteer
Results

rsday.
#180 M
Gold a
Al
Jamaic
H. King
etc. w
to find
to who
noon a
talk t
and go

Friday, F
Cold,
D
and go
may go
ersec.
museu
change
me; ha
5:30 t
get up
man, t
Learn

Thanks Again!

<https://transcription.si.edu>

Dr. Meghan Ferriter
@meghaninmotion
ferriterm@si.edu
@TranscribeSI