Seeding Engagement and Cultivating Volunteers through Crowdsourcing

Learning from Experiences with the Smithsonian Transcription Center

Connecting to Collections Care - 07 July 2016
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Hello!

Dr. Meghan Ferriter
@meghaninmotion
Today’s Talk

● Crowdsourcing
● Engagement
● Transcription
● Selecting Approaches
● Applying Approaches
● Results & Tips
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)
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
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

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- 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!
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

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Databases

&

Collections Search Center

&

Unit Websites

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Product

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

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

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
2929 " " "

Notes on Transcribing this page (optional)

Apparent "Marmasulus" (line 2966) may be a misspelling of "Marasmalus".
**Metadata: Bees, Botany, & Proofs**

![Image of a bee with associated labels and a transcription form with details filled out for locality and specimen information.](Image)

### Transcription Form

**1) Collector Details**

- **Verbatim Locality**: Winchester, Va.
- **Country**: United States
- **State**: Virginia
- **District / County**: Frederick County
- **Precise Locality**: Winchester

**2) Locality Details**

- **Elevation (from)**
- **Elevation (to)**
- **Elevation Unit**: feet

**3) Specimen Details**

- **Longitude**
- **Latitude**
TRANSCRIBE PAGE 30 OF 90

This transcription is completed and pending approval.

TRANSCRIPTION FORM

1) Bank Details
   Bank Name: Pascagoula National Bank of Moss Point
   Secured By: with bonds and/or other securities
   Place: Mississippi
   City: Moss Point
   Plate Date: 1907-02-15

2) Signatures

3) Note Details

Notes on Transcribing this page (optional)
Logbooks, Lists, & Ledgers

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

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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
- Altruistic
- Extrinsic
- 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
33% of volunteers work on 1 to 4 transcription activities.
Design & Execution

With that information in mind, my approach is:

- Purposeful
- Flexible
- Trust
- Serious Fun

- Care & Careful Listening
- Iterative
- Extensible
My Approaches

Authority

Accountability

Authenticity

Approachability
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
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
Cumulative Growth

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

Active Volunteers

- 186,950 pages
- 1,470 projects
- 6,630 volunteers
- 15 units
- Visits from 185 countries

Smithsonian Transcription Center

https://transcription.si.edu
Cumulative Growth

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

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

```
Number of Pages Completed
```

```
60000
90000
120000
150000
180000
```

- 186,950 pages
- 1,470 projects
- 6,630 volunteers
- 15 units
- Visits from 185 countries

Smithsonian Transcription Center

https://transcription.si.edu

@TranscribeSI
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
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!

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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?
Saturday, Feb. 22, 1912.
810 McDonough St., Brooklyn, N.Y.

Cold and Windy.

Arise about 7:00, at #810 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 that I had a card of introduction to Fred Tracey in Singapore
to whose sister King is engaged. I left Flushing early in the after-
noon 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.

23, 1912.

Few errands and go to N.Y.; go up to the museum about noon
and to lunch with Dwight Franklin; after lunch, go upstairs and
Why Not Just OCR? A Raven Example

Cold and windy*

Above about 7:00 I entered #180 and 3t Brooklyn, and go to Jamaica

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Why Not Just OCR? A Raven Example

Friday, 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
Thanks Again!

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