Engaging Crowds Advisory Board meeting minutes
Date of meeting: 2 October 2020

Attendees – Advisory Board
Adam Corsini (AC)
Libby Elwood (LE)
Siobhan Leachman (SL)

Apologies – Advisory Board
Stuart Dunn (SD)

Attendees – Engaging Crowds project
Samantha Blickhan (SB)
Stuart Bligh (SBligh)
Elspeth Haston (EH)
Sally King (SK)
Grant Miller (GM)
Bernard Ogden (BO)
Martin Salmon (MS)
Louise Seaward (LS)
Pip Willcox (PW)

Apologies – Engaging Crowds project
Chris Lintott, Zooniverse (CL)

Abbreviations:
RBGE   Royal Botanic Garden Edinburgh
RMG   Royal Museums Greenwich
TNA   The National Archives

1.	**Welcome, housekeeping and AOB suggestions** Welcome from PW Apologies from CL and SD No suggestions for AOB
2.	**Introductions** Project team and advisory board members introduced themselves

3.	**Questions and clarifications from Report**
	AC asked about timescale of project Project runs from Feb 2020 – Jan 2022 Zooniverse team gave an overview of review process for citizen research projects – internal review at Zooniverse, then beta testing by Zooniverse volunteers Each project partner discussed timescale for testing and launch of individual citizen research projects RMG plans to launch in November 2020, TNA in January 2021 and RBGE in March 2021 SL asked about the data sharing platform in Zooniverse [Zooniverse policies](#) state that projects are required to make their data publicly available within 2 years, although this can be delayed by an embargo if publications are forthcoming Data can be shared via Zooniverse 'Results' tab – can include link to GitHub repository or website For Engaging Crowds, the aim is to create a simple front end to host the project results on the Zooniverse platform
4.	**Response to the Report: advice and suggestions** **Licensing, reuse and open data** SL emphasised the importance of people being able to reuse and share content they helped to create Volunteers likely to be demotivated if they believe, for example, that content will go behind a paywall Project team agreed that communication of this needs thought and care. There is no intention to keep data behind a paywall. RBGE has agreed to use CC-By-4.0 for all their images and CC0 for their data but this decision is not yet been fully implemented or communicated. It would include the images and data used as part of this project. Records at TNA and RMG are covered by Crown Copyright TNA and RMG to consult colleagues about transcript reuse.

SL recommended using the 'About' section of citizen research projects to provide licensing and reuse details for images and transcripts and the reasoning behind this.

LE agreed with preference for open data and multiple options for data reuse, with recognition that institutions need to charge for some things.

AC advised that project should celebrate and embed openness and that this may encourage smaller institutions who may be more wary of open licensing.

Volunteers and diversity
AC questioned what sort of volunteers the projects were trying to attract.

There are existing Zooniverse volunteers, plus volunteers associated with RMG, TNA and RBGE.
And potential for other volunteers to come forward, attracted by the communications campaigns around each of the citizen research projects.
Towards a National Collection is UK-focused – but possibility to attract volunteers from abroad.

SK asked for advice on how we might broaden the diversity of volunteers.

RBGE have had success in attracting international volunteers by providing specimens from around the world.
SL advised RBGE to contact botanical societies worldwide to tell them about the project and ask them to promote.

Volunteers need to have spare time and access to computers – so that usually limits your audience.
Project needs to consider how to overcome those potential barriers.

Existing volunteers may not like transcribing in a new system – good idea to explain why you are doing things differently.
GM stated that people tend to dislike changes to websites but get used to them relatively quickly.

AC advised that local groups/digital clubs could be a good source of potential volunteers.

	LE suggested linking up with university classes or research talks – this could help involve younger people and certain parts of the country that are typically underrepresented in such projects.
5.	**Break**
6.	**Discussion points** PW asked advisory board which of the discussion points was most important for them – decided to spend most time on question 3 re: measuring volunteer engagement
	1. *We have drafted parameters for our proposed meta-analysis of the citizen research landscape (see Appendix A). Do these parameters seem appropriate and is there anything missing?* Board agreed that parameters seem appropriate Some discussion around what kind of organisations to include in the report – advised that informal/volunteer-run organisations will still do valuable citizen research and should be included as an important element in the cultural heritage sector. Small organisations may find the final report particularly helpful if it explains how to build a citizen research project. Covid-19 has put extra strain on small organisations – so need to try to capture their experience without putting more pressure on them
	2. *What is your view on how different tasks (marking up, classifying, transcription etc.) affect volunteer engagement?* Easier tasks can be good for volunteer engagement but could also become repetitive. Good if there is a way for volunteers to progress as they become more skilled and engaged – e.g. from tagging to transcribing.
	3. *Have you had experience of 'measuring' volunteer engagement? What metrics have you had experience of using? Have they been effective? Is*

	a survey the best way to gather this information, or should we attempt to include volunteer interviews, for example?
	Difficult to measure deep engagement that happens off platform – e.g. a volunteer might go off and do extra research, write an article on Wikipedia etc. So need to make sure that any surveys include qualitative questions to help gather information about deeper engagement. Can also find out about engagement through forums, correspondence with volunteers etc.
	Zooniverse can produce scripts to show how much time people spend on tasks – but this does not truly reflect engagement. Zooniverse advised making good use of Talk boards – try to foster a positive environment where volunteers become willing to share their thoughts and findings. RBGE reported that less than 50% of volunteers on their existing projects look at Talk. In Zooniverse it is quite easy to see who the super-users are, so can follow up with those users over time.
	Don't just measure engagement at the end or start. Figure out why people join in the first place, what they expect and how their journey across the project has changed.
	AC advised that we should be inventive in the kind of questions we are asking people in surveys – e.g. • What has been the most memorable aspect of the project for you? • If you were to run this project, what would you have done differently? • What has been an outcome of the project that you were not expecting?
	4. *How do we acknowledge the effect that automation has on volunteer engagement and take that into consideration when creating projects or encouraging use of crowdsourced results to train automated processes? For example, we know there are volunteers who prefer to transcribe entire documents from scratch ('fresh' transcriptions), and others who*

	prefer an 'editorial' role. As automation comes into play, how do we ensure that the quality control tasks we're presenting to volunteers (to check automated results for error, etc.) are just as engaging? Perhaps this isn't possible—in which case, how do we acknowledge that deep engagement with primary source materials might be a goal that ends up being in opposition to automated processes? After some experiments, it has been decided that automation will not be used in workflow for citizen research projects. SL has experience of crowdsourced correcting of OCR via Trove project. Volunteers not necessarily opposed to correcting machine output. Need to explain to volunteers if/how automation is involved in workflow and why input from volunteers is still needed.
	5. *In what ways could we make our final report the most useful to the community? What form could it take?* Board advised that best practice recommendations would be welcome Multiple forms would be good for dissemination – a light read and a long read (e.g. blog post and online report). Any publications should be Open Access. Would also be helpful to give a presentation about the report – and invite any volunteers to attend and possibly present.
7.	**AOB** None
8.	**Date of next meeting** September 2021 LS to circulate dates

Louise Seaward, 14 October 2020
Checked: Pip Willcox, 30 October 2020