Engaging the Public: Best Practices for Crowdsourcing
Across the Disciplines (#crowdcon)
Wednesday May 6 – Friday May 8, 2015
University of Maryland
McKeldin Library Special Events Room (#6137), 6th Floor
http://www.lib.umd.edu/mckeldin/specialevents/room-setup

Sponsored by: Crowdsourcing Consortium, a new national organization @crowdconsortium
Co-Directors: Mary Flanagan, Neil Fraistat, and Andrea Wiggins
Facilitation: Matt Manos, Jake Dunagan, and Sheena Yoon, verynice.co
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Purpose
The aim of the workshop is to culminate and then broaden the conversation begun in the regional meetings and webinars taking place through the auspices of Dartmouth's 2014 IMLS-funded *National Forum in Crowdsourcing for Libraries and Archives: Creating a Crowdsourcing Consortium* (CCLA). Through a 2-day capstone event in the D.C. area, we will consolidate the earlier work of CCLA and advance a national agenda.

We aim to support crowdsourcing efforts among diverse institutions and research communities and to forge a collective consortium. Throughout the workshop, our central concern will be on the question of how institutions might best adopt and employ crowdsourcing strategies for increasing public engagement, integrating data into existing collections, and increasing knowledge in the humanities and related domains. In obtaining support for the workshop from three different funders, with their own distinct communities to bring into the conversation, we will be ensuring a rich cross-disciplinary dialogue, sending a very public signal about the importance of these emerging practices, and increasing the overall impact of the workshop.

Roles:
·   Participants will bring their own expertise, experience, and opinions together with others to explore possible futures, generate insights, and make strategic recommendations.
·   Facilitators will design processes and exercises to meet the goals of the workshop, will ensure that the meeting stays on time and in flow, and will ensure that all voices are heard and understood.

Rules:
·   There is a wide range of knowledge and experience in our group, so active listening and mutual respect are keys to building a shared language in the room.
·   Have strong opinions, but weakly held. In other words, come with something to say, even if provocative, but keep an open mind to new ideas and maintain a spirit of exploration. Be intellectually hospitable.
·   Respect the agenda and the need to be clear and concise.
·   Be punctual.

Day 1: Workshop Opening

4:00-4:45   Registration

4:45-5:00   Opening Remarks: Professor Patrick O'Shea, Vice President and Chief Research Officer,
                   University of Maryland
                   Welcome: Neil Fraistat, Executive Director of MITH

5:00-6:00   Keynote, Mary Flanagan, "Building a CrowdCON"

6:00-7:00   Opening Reception

Day 2: Surveying the Future: Key Trends, Opportunities, and Challenges

8:00-9:00   Breakfast and Registration

9:00-9:20   **Workshop Gameplan**
                   CCLA PIs will provide the context and goals for the workshop.
                   Jake Dunagan and Matt Manos will explain the agenda and design of the workshop.

9:20-10:00   **Introductions and Signals from the Future:** Participants will break into groups of 6 to
                   introduce themselves and share a signal of the future.

                   A signal (weak signal, emerging issue) is typically an early or local innovation that has the
                   potential to grow in scale and geographic distribution. A signal can be a new product,
                   practice, market strategy, policy, technology, behavior, etc. It can be an event, a
                   localized movement, or a new organization. It can also be a recently revealed problem or
                   state of affairs. In short, it is something that catches our attention at one scale and in one
                   locale, but points to larger implications for impact at other locales, or even globally.
                   Facilitators will capture highlights from the groups and map these visually.

10:00-10:50   **Roundtable: Dispatches from the Field**
                   GOAL: Orientation to the larger space from both emerging and established projects

                   MODERATOR: Brett Bobley, NEH
                   1.   Neil Fraistat (University of Maryland Shelley-Godwin Archive)
                   2.   Liz MacDonald (NASA, Aurorasauras Project)
                   3.   Jessica Zelt (Patuxent Wildlife Research Center, North American Bird Phenology
                           Project)
                   4.   Ashwin Gopi (New York University, Bindi Project)
                   5.   Trish Rose-Sandler (Missouri Botanical Gardens, Biodiversity Heritage Library)

                   5 speakers will each have 5 minutes to describe their project and what they learned along
                   the way. Prompts: (1) What is the Project Goal and why was crowdsourcing the
                   strategy? (2) What do participants do? (3) What are the biggest successes? (4) What are
                   the biggest disappointments? (4) Are there any unexpected outcomes? 25 minute
                   plenary discussion will follow the presentations.

| 10:50-11:10 | Break |
| | |

11:10-12:10 **Identifying the Big Challenges**
Participants will work in pairs to identify and describe the most important challenges facing institutions who are engaging with crowdsourcing. They will present these to the plenary.

12:10-1:10 Lunch

1:10-2:00 **Roundtable: Big Challenges and How They Might be Met**
GOAL: Prompt discussion of broader challenge areas

MODERATOR: Trevor Owens, IMLS
1. Ben Vershbow (New York Public Library)
2. Meghan Ferriter (Smithsonian Transcription Center)
3. Jeremy York (HathiTrust)
4. Jeff Bigham (Carnegie Mellon University)
5. Rachel Frick (Digital Public Library of America)

Panel of experts discusses their view of the challenges of crowdsourcing and answer questions about best practices from their experience and research.

2:00-2:40 **Trend Mapping and Gap Analysis**
Synthesis of trends and emerging issues from the previous CCLA workshops. Participants will hear the big stories that emerged at the regional workshops, and have the opportunity to fill in any "gaps" and expand upon the trends presented.

2:40-3:00 Break

3:00-3:45 **Roundtable: A View from the Funders Perspective**
GOAL: Funders reflect on the challenges, needs, and opportunities for crowdsourcing, *how crowdsourcing fits into their funding portfolios*, and the landscape of possibilities ahead.

MODERATOR: Sharon Leon, George Mason University, Rosenzweig Center for History and New Media
1. Trevor Owens (IMLS)
2. David Miller (NIH)
3. Perry Collins (NEH)

Foundation and other funders reflect on the challenges, needs, and opportunities for crowdsourcing, how crowdsourcing fits into their funding portfolios, and the landscape of possibilities ahead.

3:45-4:35   **Re-Defining the Challenges**
Participants will break into small groups to reflect on the Big Challenges articulated throughout the day, and will define a set of domains or categories for how institutions might utilize crowdsourcing in response to these challenges. These categories will provide the parameters for the design and innovation responses on Day 2.

4:35-5:00   Big Challenges Small Group Reports and Prep for day 2.

7:00-9:30   Group Working Dinner

Day 3: Implementing Insights

9:00 - 9:10   Welcome! Recap Day 1, Introduce Day 2 Goals (Mary, Matt, Jake)

9:10 -10:00   **Best Practices Roundtable - 5 speakers present 3 best practices each**
GOAL: Elicit best practices across contexts

MODERATOR: Andrea Wiggins (University of Maryland)
1.   Chris Lintott (Zooniverse, Oxford University)
2.   Tina Phillips (Cornell University, Cornell Lab of Ornithology)
3.   Lieke Ploeger (Open GLAM)
4.   Kim Christen Withey (Mukurtu)

(10 min/presentation) in order to help guide conversation among the group on best practices and key learnings from the workshop thus far.

10:00-10:30   Grouping exercise - take all of the key learnings, and categorize them. Grouping exercise - take all of the best practices, and categorize them. Eliminate overlap, and come to a set of 10 key learnings/insights + 10 best practices/examples.

10:30-10:50   Break

10:50-11:20   In 8 small groups, participants will be assigned a best practice and a key learning. Participants discuss in groups the potential for responding to the insights and best practices within the context of an assigned institution/organizations. The goal is to begin to create a roadmap for executing the insight by learning from the best practices.

11:20-12:00   In a new set of 8 small groups, each participant will create 4 personas (10 min/persona) which exemplifies the "key audiences" and capabilities from the vantage point of their respective institution/organization.

12:00-1:00   Lunch/eating!

1:00-2:30	Small groups/breakouts, Project Design Canvas . Each group will create a model/canvas in order to hone in on a new idea/concept based on all of the restrictions they've been given. Includes: Impact+Outcomes, Funding/Sustainability, Execution Plan, Partners, and Products/Services. Small groups/breakouts, rapid prototyping. Groups will create a prototype of their business/product/service. (Participants stay in the same groups)
2:30-2:40	Break
2:40-3:50	Final deliverable: Shark Tank-style pitches for a product or service which could be implemented "tomorrow" on a national level - the pitch will include all elements discussed/created thus far and must also include a prototype of the concept in action. The pitch should also allow time for questions from the entire group. (estimating 5 min/pitch + 2-3 min of questions/discussion)
3:50-4:00	Closing words/done!