Forum #2 Summary
September 11-12, 2014
Weissman Preservation Center
Harvard University Library

"Charting the Digital Landscape of the Conservation Profession"

A project of the
Foundation of the American Institute for Conservation of
Historic and Artistic Works (FAIC)

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Attendee List

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PROJECT GOALS AND OVERVIEW
After welcoming remarks and thanks to the host and funding agencies, an overview of the project and meeting goals was provided.

Project Goals:

- To map out the current digital landscape of the profession
- To identify what is missing/what are the gaps/what limits conservators in this landscape
- To reimagine the landscape in a way that allows the discipline to make significant advances within the profession and throughout a broader ecosystem of allied professions, research, public education, preservation, and more… of which it is a part
- To propose broad strategic roadmaps for structuring this landscape in a way that allows it to be reimagined.

Meeting Goals:

- To help realize the project's goals, FAIC has embarked on a process of information gathering and discovery. Participants in the forum were asked:
    - To clarify and comment on what has been gathered thus far
    - To help extend the information discovery process with new information and insights

Project Work to Date:

A summary of the survey that was conducted in early summer 2014 was provided to all participants. Eric Pourchot of FAIC gave a brief presentation on its findings. Surprisingly little variation in responses by age, experience, job setting, or position was seen. Conservation professionals are deeply engaged in using, creating, maintaining, and sharing digital resources of various kinds.

Diane Zorich (Project Director) summarized another information gathering activity taking place for this project: an assessment of online resources used by the discipline. Baseline research has been conducted in order to provide a "reasonable sense" of online resources created or used by the conservation profession. It is not intended to be an exhaustive bibliography. The environmental scan has examined over 500 online resources. Project assistant Ayesha Fuentes roughly organized them into 24 categories to get a sense of "what is out there." (The baseline report was completed shortly after this Forum and is now posted to the project website.)

Diane also summarized the presentations made at the May 2014 forum, conducted in San Francisco in conjunction with the AIC Annual Meeting. The PowerPoints and a summary are available on the project website (www.conservation-us.org/digital_landscape). Key themes that arose in the discussions that followed included:

- Turnover in the discipline is leading to "lost knowledge"
    - Need to get oral histories from conservators about to retire that focus on their treatments over the years, going through their hard drives with them…. A "brain dump"
    - Need guidelines on what needs to be kept; need to work with archivists on this
    - Need a way to locate repositories of conservators' archives (especially private practitioners)

- Hesitancy about sharing conservation information with the public
    - Privacy concerns (esp. for conservators in private practice)
    - Concern about the public "doing the wrong thing" (i.e., seeing conservation work as "recipe for treatment")

    - It was clear that a discussion is needed among the community about what is sensitive information/what needs to be encumbered
- Need new ways to share information
    - Need to address "information overload"
    - Need better delivery of professional services on-demand

Phone interviews are also being conducted as part of the project, especially with international thought leaders who are not able to attend one of the project's forums. Diane summarized some of the issues that have come up in these conversations to date:

Needs:

- Universal shared data management
    - "ConservationSpace meets CollectionSpace meets ResearchSpace"
        - Concern: it is taking too long for the "Space" projects to come to fruition: people are making systems decisions now that they will elect to live with for a long while into the future because they will be invested in them.
        - Aggregation – interviewees see the importance, but feel it will only work if aggregators offer services to help with the aggregation process *and* provide something useful for individual contributors; e.g., conservators cannot spend much time structuring data for aggregation – they need tools and services to do this for them.
- More resources at the institutional level for digital infrastructure and projects
    - tools and services for resource building projects
    - issues of digital preservation –
        - keeping things "alive"
        - digital storage stability
        - migration of conservation data from old digital formats to current ones
        - hosting and maintaining sites
    - Retrospective digitization – there remains a large archive of materials that only exist in print/paper that need to be digitized; e.g., technical studies
- New models of resource building (such as "Wikipedians-in-residence" – this model spreads funding and staff, and benefits individual institutions, the profession, and the public)
- International community guidelines on sharing – such guidelines establish gravitas within and outside the community

Issues (mostly cultural):

- Conservators constrained by their traditions and processes.
    - e.g., "Project culture" - need to break away from this mindset
- Enabling collaboration – really hard to do in conservation community - WHY?
    - Conservators not as attuned to collaboration as other professionals in the cultural heritage world…
        - they need some modeling here …..
    - Institutions need to enlist their senior administrators to okay and encourage collaborative work with words and actions
        - "no budget for collaboration" – need one
    - Need to collaborate with technologists and tell them what is needed rather just accepting "what is out there" – enhanced communications

The next steps for the project will be to complete the baseline research and additional phone interviews. A third forum will be held in Dallas in December. Going into 2015, the project's Advisory Committee will meet to review the findings, and a final report will be issued.

DIGITAL RESOURCE ISSUES

A short period of questions and facilitated discussions followed the FAIC presentations. From these discussions, four clusters of issues about digital resources were identified as important to the field:

1. **Policies** for data preservation and access, including capturing lost knowledge/history
2. **Tools** for data preservation and access, including those that might help capture lost knowledge/history
3. **Information** seeking behavior – what are the types of information being sought by those in the field?
4. Further **Professionalization** – review of Guidelines for Practice; gray lit, archival lit, peer-review lit; and consideration of professional recognition

Small groups were assigned to each of the broad clusters, and these groups were asked to examine:

- What new aspects or changes are needed in the conservation community to strategically address the many issues that surface in your topic?

  The groups were urged to "think big" about:
  - Infrastructure – technical, administrative, data (What kind?)
  - Training? Professional development (What kind?)
  - Culture change (What needs to change?)
  - Collaborations? (What kind?)
  - Other…..

  And to consider what steps might bring about these aspects or changes? (How?)
  - Collaborations (With whom?)
  - New types or forms of professional standards and programs (Accreditation?)
  - Programs, awards, new funding areas
  - Development of area repositories?
  - Greater integration with other disciplines; departments? (How?)

After each group presentation, other Forum participants were invited to comment and add to the group's recommendations. A summary of key points from each discussion is presented below.

1. **Policies** Recommendations:

- Create working group (possibly from AIC) to:
  - Establish framework to create a policy for data preservation and access
    - Working group should have a broad membership! Archivists, institutions, etc.
    - Don't reinvent what's there, consult with experts
    - Recommend how to classify by type, time, relative degree of privacy, etc.
    - Encourage conservators to get owner's permission to share treatment information at time of work, or before retiring
  - Suggest categories of information that may merit preservation – treatment reports, research reports, correspondence, photos, etc.
  - Integrate with others
    - Example, ConservationSpace – might be able to incorporate privacy information?

        - Records should travel with objects, access then goes to owner
- A clearinghouse for treatment records is needed
    - Create guidelines for everyone to pull from to promote access
    - Need ways to trace the person who did the treatment
    - Institutions and private practitioners will decide which procedures to follow – create a list of considerations, suggestions, rather than dictating.
    - A depository of policies is needed
    - Possibly charge for access to treatment records to support this (users might be art dealers, auctioneers, purchasers, etc.)

2. **Tools** for Preservation and Access Recommendations:

- Make a better "machine" (search engine)
    - Vocabulary (based on "CONA" work at the Getty, perhaps?) – linked to CAMEO, CoOL, etc.
    - Records management training
    - Standard condition reporting needs to dispense with its narrative format; if this information were structured as data instead of narrative text, it could be made more accessible
    - Need to identify a "Dublin Core" set for treatment records (minimum info/fields)
    - Need to structure information as "linked data" to help pull information from different online resources
    - Users, not vendors, should not take the lead in developing tools
- Variable media – store and document
    - Conceptual model needed (MoMA developing this) – that is not platform-specific
    - Oral History – Models from INCCA-NA?
- Data Preservation Strategy
    - Offer phased levels of preservation, so people can at least start to make progress in this area without feeling overwhelmed. i.e., Level 1 preservation is ABC; Level 2 is ABC + DEF…, etc.
    - Education, Policy, Implementation
    - "Retain everything" is not viable
- Natural Language Processing needed for CoOL or other repository
- CoOL could be an interface for multiple sites – search across NPS, GCI, CoOL, etc. "Smart search" could distinguish the type of source.

3. Information Seeking Recommendations:

- A reliable knowledge base is needed, with several types of information:
    - Historical – oral history, treatment, interviews
    - News – current practice, outreach, peer group contact
    - Facts – technical, bibliographic, journal articles
    - Other – conference proceedings, wiki sites, etc.
- An information hub is needed, semi-tailored to conservation needs
    - Standardized language. Tags added to enhance discoverability
    - If accessible, will encourage more digitization
    - A portal with list of conservation repositories (DPLA model perhaps)
        - Would depend on standard metadata, which is a big burden for the originating institution, but could have different levels of participation. For example:
            - Level 1 – simple tag to identify the resource
            - Level 2 – additional information for indexing
    - Or a "union interface" model – "if you do the following things, the resource will appear in the results; if you do the following 10 things, it will be really useful."
    - A tailored search engine that searches all applicable sites ("GoogleConservator")
- Need – funding, staff, endowment to make this possible

4. **Professionalization** Recommendations:

- Multiplicity of communication modes (peer review, postprint, blog, etc.)
- AIC needs a mechanism to present and recognize each mode.
- How to recognize and value each?
    - Revisit the AIC Guidelines for Practice (regarding records)
    - Communicate ways of professional development that include other modes of knowledge
    - Find content through AIC website (aggregate information)

In the wrap-up discussions for the day, it was noted that CoOL seems to be the focal point for many of the needs discussed.

CREATIVE DESTRUCTION

The second day of discussions switched from "what is" to "what could be?" If there were no limitations, how would conservation resources be reimagined? To start moving toward this line of inquiry, participants worked in small groups and were instructed to follow a technique called "creative destruction"[1] by addressing the following questions:

- What really bothers you about the current digital landscape for conservation?
- If there is something(s) you could get rid of in this landscape, what would it (they) be?
- What doesn't work?
- What needs to be eliminated?
- What needs to be rethought or totally overhauled?

The following is a summary of the suggestions, organized by topic, from the small group and whole group discussions that followed:

Access

- Password-protected, member-only, closed websites
- Pay walls – people want transparency; they want to know the value of information before purchasing
- Silo-ing of information (AIC Specialty Groups, for example)
- One-off websites. One-off sites can die too easily; they need to be integrated into other resources.
- Project-based reports that aren't integrated into collections, other data

Simplicity/Ease of Use

- Mechanics – don't want to learn new tools for each activity or purpose
- Have AIC wiki be more open
- Change behavior on AIC social media and make it easier to use
- Layers of approval, editing, vetting among conservators and institutions - we face too many of these and thus cannot get information out in timely fashion

Structure/Search

- Get rid of narrative reports "culture" (i.e., treatment reports; condition reports). Can't search narrative reports because they are not structured
- Conventional web page design that buries information. The three-column format should be eliminated. More dynamic presentation would be better. Sites need to be flatter, information easier to find. (The "web is getting deep")
- Google searches. The Google search model is not based on accuracy, but on current use.

[1] The goal of "creative destruction" is to identify impediments in the field ("things you want to get rid of…."). By doing so, participants often are able to see what is needed more clearly.

- Lack of thesauri/vocabularies makes searches more difficult than they should be.

Information Tailored to Individual

- Listservs – ConsDistList, Specialty Groups, etc. Rethink the entire listserv concept. Want more immediate social media, ability to follow others, for example. Also need easily accessed history so same questions aren't asked over and over.
- Uncontrolled information influx – too many emails, surveys, etc. give us "information reflux"

Quality of Information

- Conference proceedings – these provide no sense of quality, as they are not refereed. They become the authoritative voice. Maybe a transcript rather than a publication would be better.
- "Guru-based" information (need to rely on evidence-based information instead)
- Unreliable resources. Quality of content as well as quality of search is important – don't want to miss sources due to variant spellings, for example

Other Issues

- Reliance on vendors with outdated software
- Get rid of the idea that conservation is so different from other fields. We face the same issues as many other fields and disciplines. We need to learn from those who face problems similar to ours and have found solutions to them.
- "'Conservation' confusion" – the term has been co-opted by the environmental sector. Reclaim the term "conservation" to describe our field (and not environmental conservation)
- Fear – there's so much fear in releasing information: fear of criticism, fear of techniques copied poorly, hesitation about posting information online
- Lack of recognition or reward for sharing information
- Lack of trust of the public and of those outside the profession

CREATIVE BORROWING

A follow-up exercise, called "Creative Borrowing," challenged small groups to identify functions and features of resources they use in other aspects of their life that they like and think might be useful to have in their work. Participants were asked to:

Consider broader/other digital landscapes you encounter in your work and personal life:

- What might be transferrable to the discipline of conservation?
- How might it be useful in the discipline?

Ways to start thinking about this:

- Think about digital applications in other sectors; your use of digital resources in your personal life for example;
  - What apps do you use and why?
  - What web sites do you use and why?
- What function or feature or information do they offer that makes your life easier? Is there an equivalent scenario in conservation in which this feature/function might work?

The groups suggested the following resources that offer features/functionality that, if they could be replicated in appropriate ways, might help conservators in their jobs. Some of these resources address issues that also are seen in the conservation community. However, most of the resources were cited for their design, ease of use, and high levels of user engagement--considerations that would be valuable in current and newly designed conservation resources.

Applications and Software

- Skitch – used to annotate pictures and send to others. [http://evernote.com/skitch]
- Mychart – for tracking health history – but also can have online conversations with doctors, can share information (similar to sharing conservation treatments) [Available through iTunes and GooglePlay – also available for customers at JohnsHopkins, Inova, other health care systems.]
- Mylist – recipe site – recommends dishes made from ingredients you already have. [Mylistsapp.com, Ziplist, or Anylist are similar]
- Ireport – City of Cambridge mobile app from which one can report a pothole or other issues – also shows what has already been reported. This would be useful for security or those in other departments to report problems they see in a museum or other collecting institution. [https://www.cambridgema.gov/ireport.aspx]
- Evernote – can tag articles, "clip" newspaper articles, assign own system of tags, and organize into virtual notebooks. Can make notes, which then relate to any tag or notebook or stand-alone. Can annotate clippings, bring in photographs – all saved to the Evernote database. Could do some ConservationSpace functions. [http://evernote.com]
- Sibley Birds of North America app – an authoritative source – good design – doesn't try to do too much, but what it does, it does well. Design makes a difference! [available through Amazon, Google Play, iTunes, etc.]
- Metropolitan Museum of Art app – visually coherent, not overwhelming. Categorizes clearly. [http://www.metmuseum.org/visit/met-app]

Websites

- Zappos.com – remembers you, what you liked, what's new. Excellent search ability. Comments from users are helpful.
- Ebird.org – is personalized, offers rewards for sharing, has structured data made accessible. Used for serious scientific research as well as by casual hobbyists.
- Ancestry.com – a pay site. Will send messages about your searches ("This 'John Smith' might be connected to the 'John Smith' you were looking for…") Behavior-driven.
- Crowdpac.com – can select one or more political issues, see how candidates score on issues, based on voting records, etc., in any race across the country.
    - Can make contributions easily on the site to those races, with the site taking a percentage. Cuts through layers, research steps. Fast, and run by a credentialed staff. A dot-com, not a PAC themselves. There are sliders on issues to indicate relative importance to the user. Uses structured information, good algorithms, effective user interface, and sustainable income model.
- NYTimes.com – integrates information from various sources, different media. See also the *New York Times* "Innovation Report" [http://mashable.com/2014/05/16/full-new-york-times-innovation-report/] that critiques its operations.
- Urban dictionary [http://www.urbandictionary.com/] – a dictionary of slang terms. An example of excellent user interactions: users can vote for definitions, providing an instant quality judgment. It is visual and on-going – quality can be changed, evaluated.
- Wikipedia – a great way to get started on a new topic; crowdsourced encyclopedia; might be a model for crowdsourcing (of terms? Other syntax?) in the conservation profession
- Stackexchange.com – knowledge base of expert communities focusing on various topics, set up as Q&A. Easy to find information, little duplication. Algorithm on searches helps guide the user. Model could replace current conservation listservs – allow you to post a question, and if others have already answered it, you can see this quickly.

- Quora – similar to Stackexchange.com, but closed to nonmembers. Q&A – easy to get lost (in a good way), going to different topics. The comments management system is very good. Can rate, respond to other responses [https://www.quora.com/]
- TheDissolve.com – cinema site. Small group of authors – quality is high – shows respect for the readers – when reading an article, banner, ads, etc. go away. Amazing commentator community.
- Facebook.com – easy to use, say some; if used to it, say others. Quick. Can choose what you want to share with subsets of people.
- Medium.com – a blogging site, but doesn't feel like it. Design encourages interaction but also respects the integrity of the original work. Members can comment on each paragraph, respond to other comments – and all comments are hidden until you want to see them. Could be a useful model for creating interactive online articles, reports, etc.

The identification of so many features found in other digital applications that might be transferable to the conservation community reiterated a sense among participants that creative solutions to common needs are being developed in other sectors.

POTENTIAL OUTCOMES

After identifying what isn't working in the discipline, and what functions and features we might wish to borrow from others, participants were asked to focus on a more utopian scenario. They were asked:

If conservation information were fully and easily integrated with other relevant information and resources online, what would the community do? Consider:

- What kind of services would it create?
- How would roles and practices in the field change?
  - Consider roles such as:
    - Individual conservators (private/institutional)
    - Professional organizations
    - Training programs
    - Other?
- What other disciplines would you work with/collaborate with more?
- What kind of new collaborations might result?
- Who would be the new audiences/consumers/users of the field's knowledge, skill sets, and services?

Participants again worked in small groups to address this scenario. The following is a summary of the group presentations and larger group discussion that followed:

What kind of services would it create?

- Restructured conference models – distributed micro versions
- There would be a system of rewards for participation
- Scenario would yield "Conservation Google" (but more….)
  - it would be a tool with peer-reviewed information
  - it would filter and sort by rating by usages/community
  - information would be reviewed
    - trusted reviewers
  - From this "Conservation Google," would yield
    - more online training facilitated
    - language translation to increase access to world collections

- Services similar to data/reference librarian (informatics)
- Big data - what is possible if you can examine patterns of 1000s of records – see patterns that are the results of practices, which might highlight new problems or possibilities.
- More passive monitoring of objects - devices doing monitoring
- Allied professions - artists and private collectors, etc. - information would be curated and narrated in way they understand
- Better structure of information and more efficient work with others
- Integration of natural and cultural conservation - explore how other branches of conservation (ecology) are managing their data - looking for fundamental and natural affinity between the two….. connecting to the future
- Entrepreneurial mindset

How would roles and practices in the field change?

- You'd see a more diverse community - might redistribute what you spend time on
- Others could see conservators more transparently; easier to find collaborators across fields
- Community would need different training to handle data (Model: Knight Mozilla fellowships - pays software developers to go into newsrooms and do something with their skills)
- Cross-institutional network of informaticists – idea of data conservators – allied professionals to work in field (akin to bioinformatics professionals working with biologists.)
- Less duplication of efforts
- More use of wider knowledge (from science journals not usually accessible, e.g.)

What other disciplines would you work with/collaborate with more?

- Collaborations (with whom)
    - increased collaboration with outside fields - other scientists
    - librarians; informaticists
- Collaborations not just with those who preserve objects, but also with those who also preserve cultures ("cooking heritage," e.g.)

What kind of new collaborations might result?

- Big data – see above
- Computer scientists /data scientists - using conservation studies for developing algorithms (e.g., libraries of textures, see below)

Who would be the new audiences/consumers/users?

- Traditional constituencies - e.g., insurance companies, collectors, private collectors, families, art historians are traditional but we would interact with them in new ways; i.e., new potential relevancy with them
- New constituencies
    - Computer science/data science –e.g., create libraries of textures which computer scientists might use to create algorithms that do pattern-matching.
    - Maintenance & facility management staff
    - Public enthusiasts

IMPLEMENTATION

After identifying the new possibilities that might emerge if conservation resources were fully integrated, participants were asked the following questions:

What kinds of bold moves are needed to bring this scenario about? Who needs to make what moves?

- Individual conservators
- Professional organizations
- Funders
- Cultural heritage institutions

If you were charged with bringing this about, how might you start?

The following summarizes the major points arising from the group discussion:

Where do we start?

- Universities with a commitment to the field
  - Bring conservation training program directors into the discussion. Instruction on software, how to deal with data, how to preserve code-based, variable, and time-based media.
  - Find a similar field with similar problems and adapt their solutions (medical profession, e.g.)
- Distributed model – not one group or top-down, but rather a network of organizations
  - Look and learn from past and other organizations, e.g. museums, well-funded institutions. Parallels perhaps with museum websites; their development was led by a handful of large museums, then joined by IMLS. Was not led by AAM – professional organizations do not have the resources or expertise to do so.
  - New roles in museums, such as "collections information managers," were started within well-funded organizations who could afford to take the risk. Similarly, the need for media conservators was seen ten years before the first positions were actually created.
  - A few big organizations could also provide massive amounts of data quickly (vs. trying to collect smaller amounts of data from a large number of small organizations or individuals).
  - Will require paid staff with recognized job tasks, not volunteers.

Where NOT to start:

- Conservation training programs – are overtasked already and do not have room to expand curriculum. There is a need for preparing conservators for greater understanding and knowledge of data, and for training on code-based works, but significant re-organization would be required to accommodate these needs.
- Professional organizations – this should not be their burden. But professional organizations could help as conveners of discussions for change; and help champion the process

What else is needed?

- Changes to CoOL. Could present a model, then tie in to other institutions
- Can we drop anything from university conservation curricula to make room for these new needs?
- Field needs its own "librarians," as exist for medical, law, and art libraries
  - Could join with the "other" (environmental) conservation to broaden the field, make it more viable as a specialty area
- Government service à la UK for building software, digital services, for the cultural heritage community
  - Indianapolis Museum of Art (IMA Labs) model would be a possibility, as long as it is an independent entity.
- Consider information broadly. The discussions have focused a lot on written information. But there are also video, podcast, other resources that need to be integrated.

CLOSING

In closing remarks, Diane summarized the process that had taken place over the course of the forum's two days. Starting with an introduction to the project and work conducted to date, the forum proceeded to discussions of large-scale issues that hinder the profession from achieving greater digital integration of its resources. On the second day of the meeting, discussions progressed from "what exists" to "what might be possible" by exploring different scenarios and building on them to identify what is needed to instigate change in the profession. FAIC will build on these discussions in the project's third forum, to be held in Dallas in December 2014.

At the close of the meeting, FAIC thanked Franziska Frey, Brenda Bernier, Priscilla Anderson, and the Weissman Preservation Center staff for hosting the forum; the project's funders for their support; and the participants for their time, insights, and assistance. The day concluded with a tour of the Weissman Preservation Center's conservation laboratory.