

Establishing Online Communities to Promote Best Practices in Collection Care MCI Topics in Museum Conservation March 18, 2015 10:45 am

Rachael Perkins Arenstein, Integrated Pest Management Working Group (IPM-WG) Co-Founder and American Institute for Conservation (AIC) e-Editor Leon Zak, Zaks Software and MuseumPests.net Webmaster

The current digital landscape makes it easier than ever for groups to collaborate in a virtual environment and to "push" the content out to networks of colleagues and contacts via the devices that are now at our fingertips. However, as preservation and museum professionals seek to engage colleagues and advance topics such as collection care and digital curation, it is important to understand the available tools and how to effectively implement them. With online resources multiplying, it is appropriate to examine some basic questions: What does it take to create a successful digital community? Which platforms are most effective for sharing information in the cultural heritage community?

Rachael Arenstein will present a brief history of the Integrated Pest Management

Working Group. Over the past twelve years the IPM-WG grew from a collaborative project between two museums into a large group with participants representing nearly 60 institutions in the USA, Canada and Europe. Its museumpests.net website and associated online resources are acknowledged as essential tools for the preservation and cultural heritage community. Arenstein will contrast the experience of the IPM-WG with other digital resources by professional societies and institutions, and discuss the essential elements for creating a community and the difference between presenting information and developing communally accepted best practices.

Leon Zak will address the best use of, and expected audience for each system to facilitate choosing the right digital distribution stream. Determining which digital platform a community should choose to engage and communicate with its members is a critical decision. Blogs, wikis, websites and apps - all are possibilities and the correct choice is the one that best fits the community's needs and goals. He will give a brief walkthrough of how such systems are created and discuss the needed resources for implementation.



When Mary Ballard suggested a talk about online communities and preservation I must admit that I was skeptical that anyone would find the topic interesting enough to come. As we planned the logistics I had to send Mary documentation verifying that I was enough of an "expert" in this topic that MCI could sole source the lecture.

In editing my C.V., I realized that between the work with the IPM-WG, my position as the American Institute for Conservation's e-Editor, and various web-based contract projects I've completed as a conservator in private practice I probably spend more time working in the digital landscape than I do at my treatment bench.

There are various ways to look at this time expenditure:

Smart business niche for a conservator in private practice

Distraction from the work of "real" conservation

Necessary evil

A meaningful professional contribution

I believe my work with online preservation communities has been both professionally important and socially gratifying and I had to admit that there might be something in the idea worth exploring. So, whether your presence here today is due to an interest in the topic or just the opportunity to escape your office or lab bench for an hour, I hope some of what Leon and I discuss today will be useful to you when you think about sharing information online!

As conservators many of us we were drawn to the profession for the opportunity to work with our hands, to work with art. It is tactile and concrete. But so much that surrounds what we do as conservators is now digital and so it is impossible to now be a Luddite in this field.

Conservator's Digital World Documentation Research Collaborating with colleagues Sharing with the public

Our documentation both written and visual is digital, research for our work increasingly doesn't require we leave our chair, and we share what we do with colleagues and the public online.

Charting the Digital Landscape What digital tools and resources do conservators use and create? Who are the audiences for conservation content, and how can this content be delivered to these groups by digital means? What kinds of digital tools, resources and platforms will be needed as the profession continues to grow?

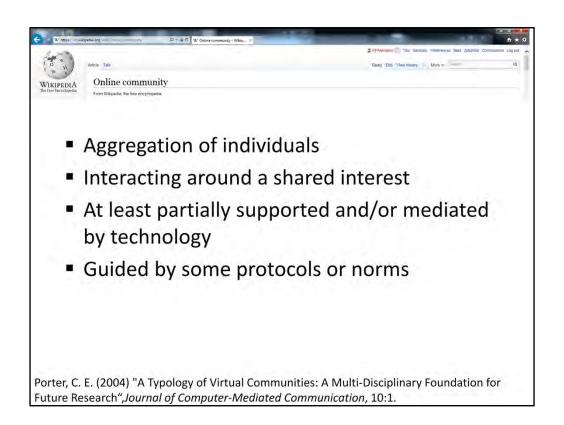
The online footprint of conservation and the larger preservation community is now huge. For the past year FAIC has been charting the "Charting the Digital Landscape of the Conservation Profession". Some of the questions they have been asking include:

Rachael Hon

- *What digital tools and resources do conservators use and create?
- *Who are the audiences for conservation content, and how can this content be delivered to these groups by digital means?
- *What kinds of digital tools, resources and platforms will be needed as the profession continues to grow?



This project is supported by grants from some of the big guns of conservation funding, the Mellon, the Kress and the Getty Foundations suggesting that they too see the importance in answering these questions to "identify areas critical to the community both now and into the future." I encourage you to visit AIC's website and read more about the project and some of the preliminary findings.



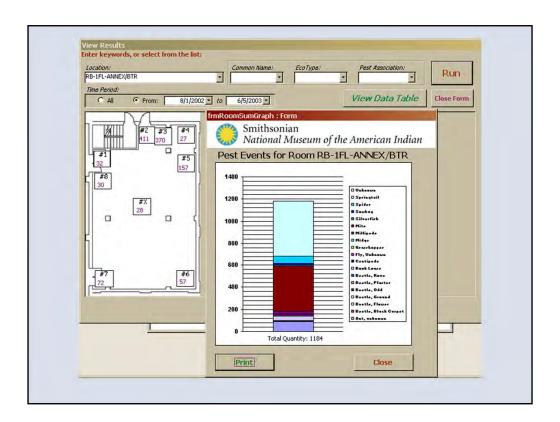
So, we, as a community of conservators or preservation professionals, are all online and we're all using digital tools, but that isn't necessarily the same thing as being an online community. What's the difference? I went to the mother of all online communities for an answer. One definition of an online community in Wikipedia is "an aggregation of individuals...who interact around a shared interest, where the interaction is at least partially supported and/or mediated by technology and guided by some protocols or norms."

As I got sucked into reading up on the ethnographic study of online communities, their development and life cycles I started to mentally categorize the online resources that I've worked on establishing. I'd like to talk about a couple of these projects as I think their differences might be instructive to anyone thinking about how we work and distribute information together online.

Wikipedia definition - http://en.wikipedia.org/wiki/Online_community



Since this talk kicks off the annual meeting of the Integrated Pest Management Working Group let's start with this group.



The IPM-WG didn't start out as an online community but rather a bi-institutional collaboration between the American Museum of Natural History and the Smithsonian Institution's National Museum of the American Indian to develop a database that could be used to record and map the results of pest trapping.

Bar Codes, Scanning & Monitoring



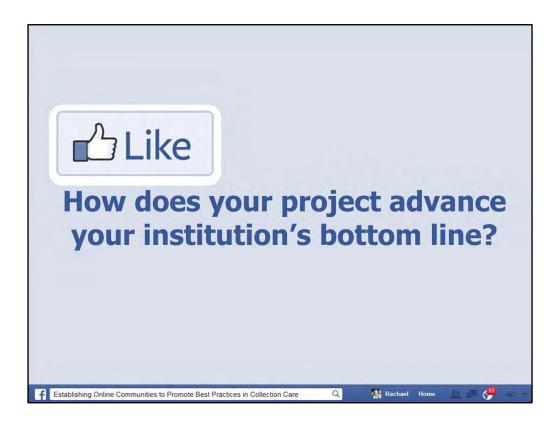




- 19 hours without database
- 16 hours with database
- 10 hours with database and scanning

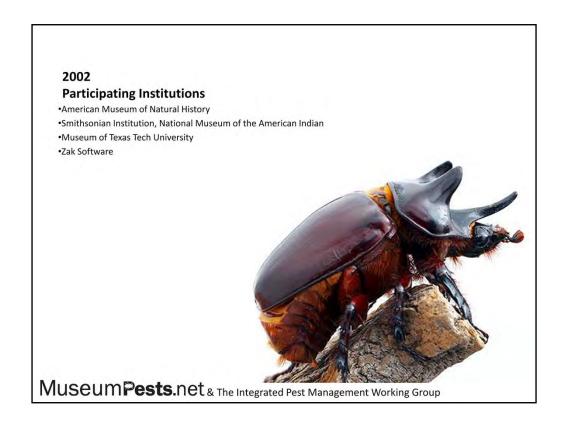
Use of the AMNH developed database and an NMAI developed bar code and scanning system to speed data entry ultimately reduced the time spent on sticky trap monitoring from 19 hours down to 10 hours while also increasing the quality of the data. We were so excited by our results that we wanted to share the fruits of our labor.

Riding a wave of optimism, ambition and ignorance we contacted Jim Reilly of the Image Permanence Institute and developer of the Climate Notebook software program to ask him what was involved in getting the software to point where it could be distributed to other institutions. When Jim mentioned 10 years and half a million dollars we realized we were out of our league. It also highlighted an issue that is worth considering here... Jim worked at an academic institution he had freedom to follow his intellectual interests as long as he could support them financially. Software for our small cultural heritage community was never going to be a money-maker but he was able to procure grants showing that this would fill a need for the preservation community. Museum employees don't have the same freedom to follow their intellectual passions. They have jobs with performance metrics and the work has to get done so we didn't see that there was a possibility that an employee in a museum setting would be able to move forward a larger project of creating an IPM mapping program for the cultural heritage community.



This is one of the first takeaways that I'd like to highlight. The ability to move a project forward even an online community, is dependent on somehow **advancing the bottom line for your institution.** Will it make money? Will it allow you to do your job better or more efficiently? Will it bring prestige to your organization? Does it advance your mission? This isn't a surprise for good project management but it still has to be considered even in the virtual world. I'll come back to this to show how various online preservation communities address these needs.

Jim, however, was intrigued about the relationship between pest activity and his interest in temperature and relative humidity. Enough so that he offered to sponsor his Climate Notebook programmer to come meet with us if we should pursue the issue any further. And so we did.



In 2002 AMNH sponsored a meeting that we called the IPM Think Tank, with participants from several institutions who were also working on pest management projects and a key addition, my co-speaker today, programmer Leon Zak, Jim's colleague.



I'll let Leon answer for himself whether Jim did him a favor or not, but this raises a second takeaway. Having technical knowhow from the beginning is key. As we threw out ideas at our one-day meeting we focused on the development of databases with potential for mapping pest activity, identification of essential data fields for databases and the need to survey the community regarding IPM activities and needs. Leon contributed valuable information on platforms and technology that helped steer our discussions from the theoretical to the concrete. Like:



We agreed that we'd remain in contact to discuss future collaborations and Leon offered to establish an email list so that the 11 members present at that first meeting to could easily communicate. Now, 13 years down the line, this free listserv now known as the Pestlist has over 600 subscribers and serves as a forum for discussion of IPM, pest treatment and insect identification, giving people worldwide access to some of the leading experts in the field of IPM implementation, entomology and preservation. So, as of 2002 we had a shared interest and we were communicating online. But in no way would we have categorized ourselves as an online community – it wasn't a concept or a goal that we discussed.



The title of this talk mentions best practices - Our goal at that initial meeting was not so ambitious as the development of best practices. We simply wanted to share and learn from each other's IPM experiences to prevent reinventing the wheel. But, I believe that the process that we have gone through since 2002 has, in fact, been a good case study in developing best practices in several areas of integrated pest management and has influenced its implementation in the cultural heritage community.

In order to look at this though we have to take a moment to define our term. Broadly speaking, best practices are commendable actions and philosophies that successfully solve problems, can be replicated, and demonstrate an awareness of professional standards. They aren't standards and they aren't mandated. The museum sector has advocated developing and codifying best practices but there are a number of significant logistical challenges in this task.

Key elements in developing best practices

- Draw widely from community procedures
- Assess critically
- Include cross-section of the professional community
- Product must be available to the community
- · Create mechanisms for feedback and review



To be maximally effective, best practices must be drawn from the widest possible sample of community procedures. The assessment of these procedures needs to be *undertaken critically by an adequate *cross-section of the professional community. The best practices developed from this process should be made available* to the community through publication, either via print or the web. Finally, because best practices are subject to continual refinement and evolution, there must be *mechanisms in place for community feedback and regular review.



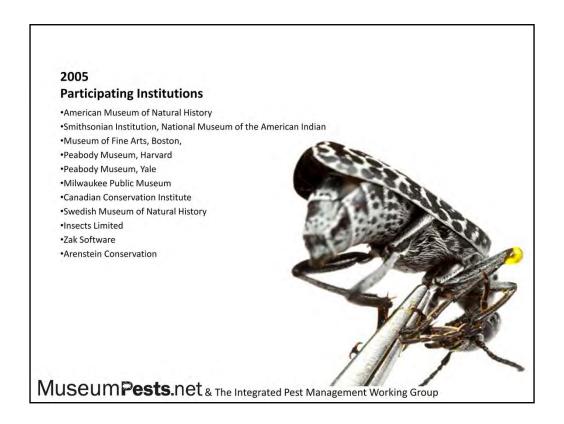
Traditionally, the role of developing and promulgating best practices has been taken on by professional societies as these bodies are generally best placed to access the collective knowledge of their communities and to draw on this knowledge for critical assessment. Best practices that are developed in this way come with a stamp of approval from the society taking the lead, giving them added weight. At that first meeting in 2002 we had conservators, collection managers, an administrator, a conservation scientist and a computer programmer. It was clear to our group that disciplinary boundaries that define existing professions may act as a barrier to tackling community-wide problems such as pest management and that a collaborative approach was necessary. As we looked for a home group we realized that we didn't really fit anywhere.



The work of an art conservation unit would not necessarily garner buy-in from pest control operators, collection managers or facility staff. Entomological societies may not be interested in the practical implementation of IPM and organizations for Pest Control Operators don't normally address the needs of a small market like the cultural heritage community. The Society for the Preservation of Natural History collections does foster cross-discipline interaction, but the titular focus on natural history collections may appear to exclude art museums, libraries and archives. The IPM Working Group, for lack of a better name, came about because no professional society was able to bring together the varied stakeholders necessary to make an IPM effort a success.



Takeaway #3 – Our community formed because there wasn't an existing community which met our needs.



In 2005 staff at the American Museum of Natural History proposed a meeting that would pool resources to tackle IPM issues, and invitations were sent to out to stakeholders across a variety of email listservs. This two-day meeting ultimately gathered nineteen people representing eleven institutions from across the U.S., Canada and Europe.

IPM Questionnaire		
IPM Questionnaire - Microsoft Internet Explorer		
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daress a http://www.museumpests.net/questionnaire/questions	naire.asp	₩ 🔁 @
	Other (PLEASE ELABORATE)	
T	2	
	Needs	ľ
29. What would you like to see in a	☐ Training and specialist workshops ☐ Best practices	
museum community- wide IPM initiative?	☐ Database development	
(Choose up to three from the following list.)	☐ On-line ID resources ☐ Hard-copy ID resources	
	Regional ID resources Web-based discussion forum	
T	E-mail list-server	
	On-line references for supplies and products On-line list of specialists	
	Case studies that support the economics of IPM	
	Development of IPM standards Other - please describe	
T		
30. Are you finished completing all the	YES - IAM FINISHED	
questions in this questionnaire?	NO . I am NOT finished	
garanamer	Choose this option to save your work and come back later.	

Our main task that year was creating a questionnaire that was sent out to the cultural heritage community to gather information on their IPM needs.

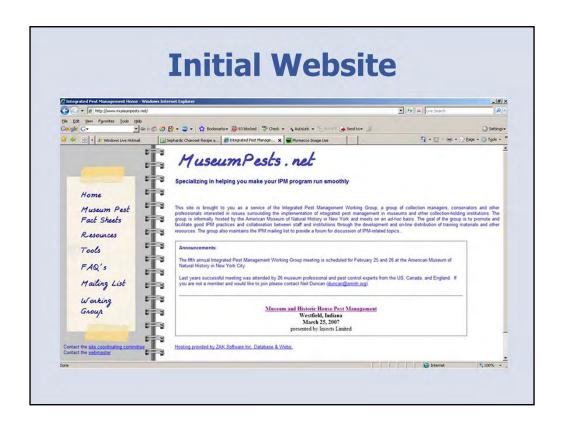


The information from that survey allowed us, at our 2006 meeting, to focus our work on four general topics that addressed the needs identified in the survey that were also of practical benefit to our participants.

We continued to meet annually with the subgroups working through their list of short, medium and long-term product goals. Some subgroups like the data collection group develop products from scratch and others like the standards subgroup requested documents from the museum community that were evaluated by the group with the best examples chosen to be shared online.

Key elements in developing best practices ✓ Draw widely from community procedures ✓ Assess critically ✓ Include cross-section of the professional community ■ Product must be available to the community ■ Create mechanisms for feedback and review

Without realizing it we were developing a website that contained best practice information.



Our initial website was put up by one of our members who was teaching himself HTML coding. In 2007 we were stunned when Leon reported that the site, which we had developed primarily as a tool for the participants in our group to share information and work online, was receiving hundreds of hits per month from people not involved in our group. We were also receiving emailed requests for help and information. We realized that the site was unintentionally filling an information void. That year we made a decision that we needed to fundamentally rethink how we distributed our information online. We also realized that our makeshift website was no longer sufficient. And this is when we ran into our first dilemma. Our ad hoc structure had served us well up till this point – but it was an impediment to raise funds so we could pay a vendor, in this case Leon, to create a professional website for us.



It took us two years to raise \$10,000 but we were ultimately successful and our new website launched in 2010. The new site not only allowed us to better organize and present our information, but with Leon's skills we were able to offer resources like an image library that were not as easy to create then as they are now.



With the new site we were able to receive information on our users and analyze our stats. We were able to see how people got to us — what keywords they were searching for. We were able to see that our hits peaked in the spring and fall when insects swarm or look for warm places to spend the winter. We noticed that most people went first to the Identification and Solutions pages indicating that when they came to us they already had a problem to solve. We started getting more feedback on the site and requests for new information.



We are now into our 3rd version of the website based on a WordPress platform that more easily allows us to add multiple Editors and Authors as our group has expanded.



Since 2005 The IPM-WG has meet annually for two-day meetings where we sit and hammer out or update the resources that go up online. So, our process meets the definitions of an online community and of defining best practices but does that make a success? How do we measure this?



By the number of institutions who have supported their staff to come and participate many year after year - over 60 from the U.S., Canada and the Europe at last count.



By website stats - knowing that we receive about 2,000 visits per month?

By the fact that we don't have to promote the site or the listserv online now – people who use the list do it for us? What about the fact that IPM sessions have been included at conferences and workshops with people sharing information more freely? When we first asked for people to contribute policy or procedure statements in 2005 – we got virtually no response in part because people didn't have these documents and, in part, because they were too scared to admit that if they did that it would tarnish their reputation by admitting that they had a pest problem.



Maybe it is a bit of each? Because we are an ad-hoc group we don't have to justify our group to management – but think about your metrics for success carefully since it will help you justify your project with management.

What's In It For Me? Professional networking Job relevant education Saves time when sharing with colleagues Good for business Giving back to the community

€ Establishing Online Communities to Promote Best Practices in Collection Care

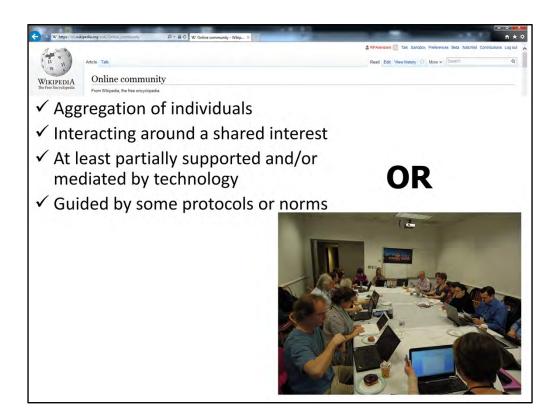
On a more personal level there are other measures of success. Some of the reasons that participants give for returning each year are typical of online communities that have allowed them to find and work with colleagues with whom they would never have interacted otherwise. Despite the fact that we do not profess to teach IPM – everyone learns by participating and hopefully that makes us better at our jobs planning or implementing IPM in our institutions. Several people who became known in our small circles as experienced in topics like bed bugs in circulating library collections or freezing an expanding range of artifact types found that having the information on the museumpests.net both gave them confidence that they were providing good information since the resources had been vetted by colleagues saved time allowing them to just send the link to the webpage rather than writing out an answer to each inquiry. Some have found that their involvement has been good for business and others have mentioned the opportunity to give back to the community. These are very typical of the responses in ethnographic studies of online community participation.



Every year I wonder how much longer the group will go on. In 2011 we started a strategic planning initiative and looked at three options - *disbanding, *Stasis - limiting our scope to keeping the existing resources alive but relatively static and *Growth - moving forward in expanding the site and creating new resources. Feedback was asked from past and current participants and the vote was overwhelming for *growth - and continuing on our path.



We explored the idea of meeting in person every other year or virtual meetings but again, the vote was overwhelming that what made the group special, what really motivated people was getting together in a room with colleagues and hammering out solutions collaboratively.

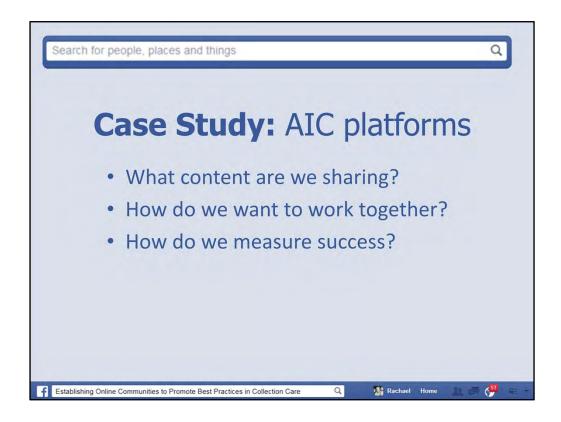


So, in returning to the idea of online community, we meet the definition, but are we really an online community or a real flesh and blood group that merely has an online distribution stream for our content? Does it matter? You can argue that it may not always matter as long as you are clear about what you are doing.

I'd like to contrast the IPM-WG experience with my work as AIC's e-Editor and a few sites that I have done as a contractor to show how an understanding of the dynamics of an online community and what is involved in developing best practices is relevant as other groups and institutions continue to create and distribute preservation and collection care content online.



As e-Editor I am responsible for developing the professional content that is on AIC's digital platforms. This now encompasses *AIC's website, *blog, contributing to our *online portal, a *wiki, a new website on *storage called STASH and, most recently the *online community Connecting To Collections Care. AIC has a lot going on online!



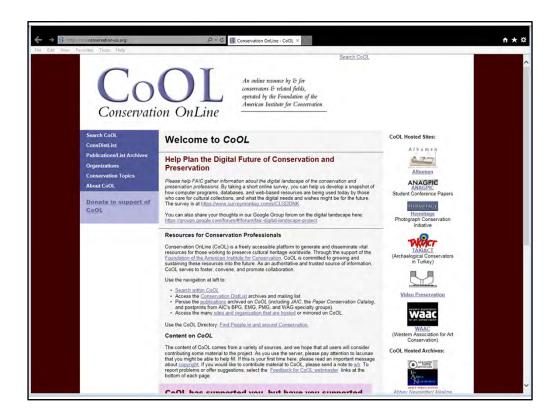
And each site serves a different purpose or audience, but thinking about what content we want or need to share, how we want to work to create that content and how we measure the success of the site has been helpful.



Let me give you a few examples...Our blog is entitled Conservators Converse – the initial idea was that it would allow conservators to comment on topics relevant to us – from presentations at AIC to conservation in the news – rather than having conversations always within the silos of our specialty group listservs.



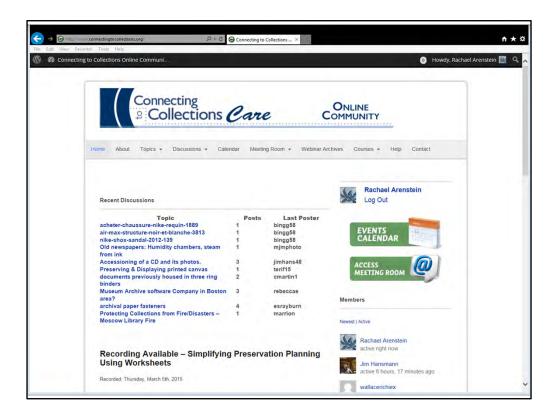
The site is active and receives between 200-400 hits per day and I field a couple of inquiries a week from site visitors, but it hasn't taken off as a venue for discussions. It is, however, very useful as a content distribution stream and we have over 260 contributors to the site meaning that it encourages participation in a different manner. The WordPress platform is easy to train and manage – although I'll leave more of that to Leon to discuss shortly. Is it is a success? Not in the way we originally intended but I'd argue that it brings valuable content to the membership and public.



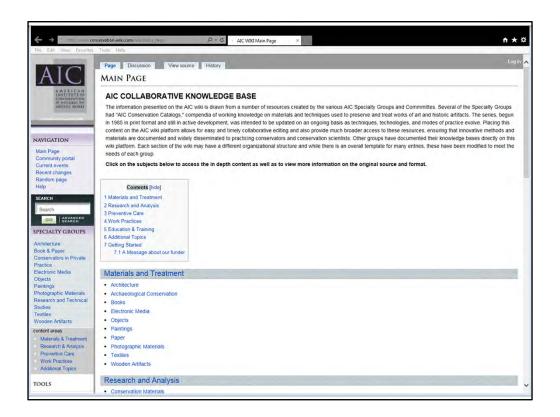
The Conservation Online web portal and the emailed Cons DistList have been immensely important for our field and we have thousands of pages of information and thousands of users but I'm not sure whether we now think of it a community. The interactions often aren't personal or sustained. 20 years ago CoOL was our main online destination but now it is one of many. As AIC seeks to modernize CoOL and keep it relevant in our current Digital Landscape these issues become increasingly important.



The new website Storage Techniques for Art, Science and History collections with the groovy acronym STASH is somewhat analogous to museumpests.net — in that it fills a void in preservation practice and brings together content by and for several museum professions including conservators, mount makers, collection managers, vendors and exhibition designers. The site is only one year old and the editorial committee is only now getting up and running so we have a lot of work to do to get it to the point where people see it as a central resource promulgating best practices for storage mounts. Many of the pieces that have contributed to the success of museumpests.net are in place — except the in-person element so I am interested to see if it develops as a real community or merely as a community resource. It may take a few years until we really have an answer.

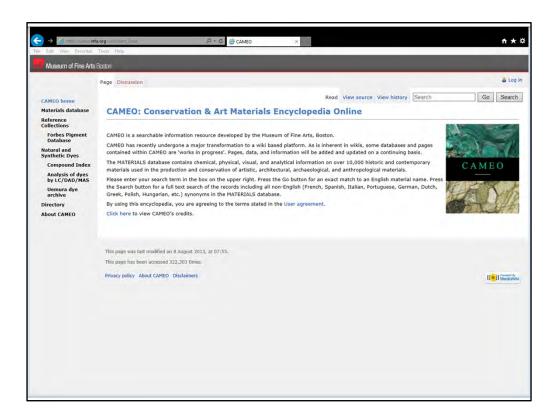


The Connecting to Collections Care site was developed by Heritage Preservation to help small to mid-sized institutions find good advice. The site offers free monthly webinars on a wide range of preservation topics and has a forum that is very active in asking and answering questions. The challenge that we need to address in the next year or so is how to bring more experienced professionals in to participate in the forum so it is a community not of the blind leading the blind – but of experienced preservation professionals contributing useful advice to the people who need it most. I hope that an understanding of what people valued in contributing to the IPM-WG will allow us to draw others in to this new venture.



AIC's wiki site provides a contrast to the IPM-WG. Wikis are an interesting tool and Leon will speak more about the platform but, in general, they are websites that are geared for collaborative editing. They require a bit of training to understand how to add and edit information. When AIC's wiki was launched in 2009 it contained the content from four of AIC's specialty group catalogues. Since then 15 additional specialty groups, networks and committees have started adding content and each of these groups function somewhat differently. We have 873 content pages now with almost 2.5 million page views and almost 300 registered Creators. Some collaborate solely online in a wiki-like manner – putting content up and editing it as they go with feedback and contributions by the group. Some have a traditional approach to creating and editing content off-line only putting their content up when it is polished. What I've learned though is that several of the IPM-WG lessons still hold true. People crave human interaction even when working online. As a result, we have hold an in-person meeting at AIC's annual meeting where wiki participants can meet and talk to each other and this year we will be holding our first full-day hack-a-thon. Second, getting over the fear of sharing information is still a big issue in our field. We worry that we may make a mistake, that our colleagues may catch it and we'll look bad, that other people might misunderstand or misuse our information. But working collaboratively does help us overcome these fears. Contributing to the wiki has also provided learning and mentoring opportunities as we often pair an experienced conservator with information to

provide but less interest in learning the back-end of putting it up on the site, with an emerging professional for whom the minor coding necessary for the site is not intimidating and who will benefit from the interaction and working on the content. It is virtually impossible to make an irreversible mistake on a wiki and it is easy enough to teach people how to work on the site. The buy-in from the crowd-sourcing does lend to the acceptance of content as representing best-practice. So I'd categorize our wiki as a successful online community and a distributor of best practice information for our field.



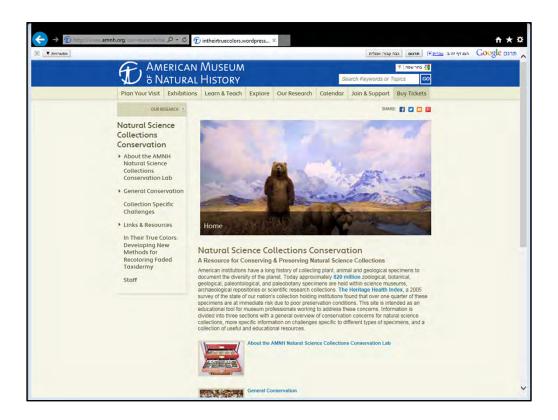
Other organizations are also going the way of the wiki. Michele Derrick of the Museum of Fine Arts was having trouble getting edits and new content made on CAMEO when it was a proprietary website and has recently moved CAMEO to a wiki platform so that multiple editors can contribute. The task now is to create a community from the people who use and are invested in the site – which I suspect includes many of us in this room – to learn how to contribute and do our part. The Society for the Preservation of Natural History Collections is also launching a wiki site focusing on developing Best Practices. Both MFA and SPNHC are sponsors of the upcoming AIC wiki hack-a-thon.



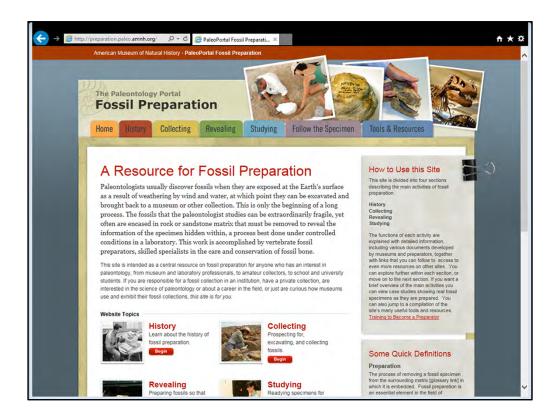
Outside of my e-Editor work I've developed content for several preservation related websites. These were exercises not in community building but in content distribution but that has relevance to their overall longevity and success.



Two of the sites are web-modules available through the Paleontology Portal. These sites were set up as a way for the American Museum of Natural History to fulfill the requirement for NSF grants to share information and contribute to the field. The information in the Collection Management Module draws on information from AMNH and a few other contributing museums which are leaders in paleontological research. But as we've examined, just because they are big guns in the field that doesn't qualify this as best practice.



The same with AMNH's Natural Sciences Conservation website. This site disseminates the work being done in the institutional lab. It doesn't represent a broad community effort but there is a dearth of information on natural science conservation so it can be argued that these two sites are still important contributions even if it is a one way conversation.



In contrast, the second module on Paleontological Preparation techniques required me to work with a large number of preparators to gather and vet information to create the site. I'd argue that this site does distribute best practices but there is no online community component. This site is mentioned frequently as a source for information on the PrepList listserv – but there is no funding for maintaining, updating or expanding the information so it will be interesting to see how long that perception of a best practices site lasts.

Considerations for developing online content • Who do you want to work with? Does creating a community — Give your content extra value? — Helps the work gets done? — Ensures longevity for the site? • How do you want to work together? — What kind of interactions facilitate your work? • How do you measure success? • How do you prove it to others?

So, what I hope that you take away from this portion of the talk, is that for anyone looking to put preservation information online – it is useful to think about how your working methods will influence your content creation and your choice of platform. Do you want to send information out to the void or do you want to create a community and have conversations come back to you? Our AIC Code of Ethics states "XI. The conservation professional shall promote an awareness and understanding of conservation through open communication with allied professionals and the public." How we do this online has a big bearing on our future as a profession.

And for more information on the nuts and bolts of what to create online, I turn you over to my colleague Leon Zak.

Thank You

- The members of the Integrated Pest Management Working Group and their institutions
- American Institute for Conservation
- Society for the Preservation of Natural History Collections
- Smithsonian Institution Museum Conservation Institute
- · Bob Koestler and Mary Ballard
- Emily Kaplan, National Museum of the American Indian

