

Title	User Engagement Handbook
Version	2.1
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Date	2015-10-30
Status	Second version for use as a handbook for CLARIN ERIC and National CLARIN programmes
Distribution	BoD, SAB, GA
ID	CE-2015-0590



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The Purpose of this Document

This document is intended to be used as a source of ideas for different ways of engaging with users, with some suggestions for how to carry out the activities. For the purposes of this document, 'users' are academic researchers in the humanities and social sciences who are currently using, or might potentially use, digital language data and tools in their research.

This first version has been discussed in various draft stages by the Board of Directors, the National Coordinators' Forum, and at the User Involvement Group. The content has benefited from input and suggestions from many people during this process.

It is intended that there will be future versions of this document, as the suggested activities continue to be tested in the field as part of CLARIN activities. Suggestions for improvements, corrections and additions are welcome and should be sent to martin.wynne@it.ox.ac.uk.

A list of user engagement activities

Section A: Service-based Activities

1. Provide the services

“Build it and they will come”

Concentrate on building and providing services to as high a quality as possible, and marketing them. This is ultimately the main way that users will gain benefit from CLARIN in its operational phase.

Examples:

- ERIC infrastructure services: Virtual Language Observatory, Federated Content Search, etc. (see <https://www.clarin.eu/content/services>)
- Services provided by centres, e.g online access to national corpora (see <https://www.clarin.eu/lrtshowcases> for examples)

Advantages:

- CLARIN members and consortia can concentrate on their strengths
- We don't start from scratch - existing tools and datasets can be rebranded as CLARIN services as they are integrated into the infrastructure, and they come with existing users
- We are not just reactive - we can offer innovative new services making new things possible, not only what users are asking for based on current facilities

Disadvantages:

- Delivering innovative and experimental new services is inevitably speculative, and we can't guarantee that they will be successful
- Additional requirements gathering and gap analysis are needed to find out what non-users want and what the barriers to uptake are for our services
- Additional dissemination and engagement activities are needed in order to attract new users

Role for CLARIN ERIC

- Delivering central services;
- Europe-wide dissemination of central services;
- Supporting cross-border dissemination of centre and national services;
- Supporting uptake of federated identity management services, which allow centres to start to offer secure access across borders.

Measurement:

- There are numerous disparate methods for measuring use of the various infrastructure services, currently being integrated and made more consistent via the use of PiWiki

2. Providing advice and support

“Good morning, can I help you?”

Set up a point of contact for providing help and advice, and work with people who send in requests to the help centre. This could be done informally by centres of expertise or via a formal CLARIN services with service level definitions.

Examples:

- CLARIN-D Legal Helpdesk
- CLARIN-D Support Helpdesk
- LINDAT Helpdesk
- CLARIN-NL helpdesk
- CLARIN-DK Helpdesk
- K-centres
- L-centres
- ERIC support for central services (<https://www.clarin.eu/content/support>)

Advantages:

- Provides a real service for real-life research scenarios;
- A way to attract new users, and especially digital newcomers needing support on getting started.

Disadvantages:

- Reactive not strategic;
- how to allocate resources rationally and fairly;
- need good marketing and publicity to reach potential users.

Role for CLARIN ERIC:

- Offering a single point of contact to triage requests for support and advice;
- Supporting the Knowledge Sharing Infrastructure;
- Publishing handbooks based on expertise and know-how drawn from across countries and centres.

Measurement:

- count the number of requests, including analysis of users by discipline, country, institutions, language etc.;
- log response times and resolution rates;
- qualitative analysis of success stories.

Section B: Workshops and events

3. Curation projects

Work with a particular dataset and the organizations and people associated with it, to make the resource more usable and sustainable, and to work towards integration in the CLARIN infrastructure

Example:

- Curation projects in CLARIN projects in Austria, Germany and the Netherlands

Advantages:

- In-depth engagement with practitioners;
- Projects could involve key resources, which come with ready-made sets of users, or potential users;
- The outputs of the projects will be a (more) usable and useful resource, which will attract new users;
- Calls and projects can be used to learn about barriers to working with specific communities and resources;

- Calls for proposals can reach a large number of people and raise the profile of CLARIN.

Disadvantages:

- Tendency for deep rather than broad engagement (i.e. direct contact is with a relatively small number of researchers);
- Centres and people already engaged with CLARIN are most likely to respond successfully to calls; schemes need to ensure that outreach is achieved;
- If only a small proportion of proposals are funded, unsuccessful applicants will be disappointed and possibly less willing to engage with CLARIN in the future.

Role for CLARIN ERIC:

- Europe-wide dissemination of project news and outputs;
- Cross-border funding programmes for collaborative projects.

Measurement:

- Count the number of projects, participants, resources, including classification by disciplines;
- Count the number of users and uses of enhanced digital outputs of the projects;
- Qualitative analysis (e.g. case studies) of the projects
- Count further new projects made possible by these collaborations and measure their income, usage, impact etc.

4. Demonstrator projects

Work with academics to support the effective use of existing language resources and technology to answer a research question in a humanities or social science domain.

Example:

- Demonstration projects in AT, DE and NL national initiatives.

Advantages:

- In-depth engagement with practitioners;
- Offers proof of concept of the CLARIN research support model;
- Can be used as the basis for case studies;
- Calls for proposals can reach a large number of people and raise the profile of CLARIN.

Disadvantages:

- Tendency for deep rather than broad engagement (i.e. direct contact is with a relatively small number of researchers);
- Centres and people already engaged with CLARIN are most likely to respond successfully to calls; schemes need to ensure that outreach is achieved;
- If only a small proportion of proposals are funded, unsuccessful applicants will be disappointed and possibly less willing to engage with CLARIN in the future.

Role for CLARIN ERIC:

- Europe-wide dissemination of project news and outputs;
- Cross-border funding programmes for collaborative projects.

Measurement:

- Count the number of projects, participants, resources, including classification by disciplines;
- Count the number of views of online outputs (if relevant);

- Qualitative analysis of successes and barriers
- Count further new projects made possible by these collaborations and measure their income, usage, impact etc.

5. Develop bespoke tools for a project

"We have to stop optimizing for programmers and start optimizing for users."

Work with academics to address a research question in a humanities or social science domain by developing software for them to use in a research project.

Example:

- PL demonstrator projects

Advantages:

- In-depth engagement with practitioners;
- Software developed in this way is likely to respond closely to real-life user requirements
- Offers proof of concept of the CLARIN research support model;
- Can be used as the basis for case studies;
- Calls for proposals can reach a large number of people and raise the profile of CLARIN.

Disadvantages:

- Tendency for deep rather than broad engagement (i.e. direct contact is with a relatively small number researchers);
- Centres and people already engaged with CLARIN are most likely to respond successfully to calls; schemes need to ensure that outreach is achieved;
- Software tools developed might not be of more general application
- Making the software available and reusable as a service and sustainable involves a lot more effort than that required to make it usable during the lifetime of the project and will often not be possible

Role for CLARIN ERIC:

- Europe-wide dissemination of project news and outputs;
- Cross-border funding programmes for collaborative projects.

Measurement:

- Count the number of projects, participants, resources, including classification by disciplines;
- Count the number of views of online outputs (if relevant);
- Qualitative analysis of successes and barriers.

6. Joint research projects

"It takes two flints to make a fire."

Louisa May Alcott

Identify a suitable partner, and engage in a joint research project with them, with the CLARIN partner as a principal or joint investigator. Compared to the other projects in this list, this would be a more substantial project than a 'Demonstrator project', and there would be more involvement in the research compared to 'Bespoke tool development' or a 'Curation project'.

Examples:

- ?

Advantages:

- Can provide a more thorough case studies and compelling examples of how CLARIN can really be used in research
- Multiple outputs are possible (see Measurement)
- Deep engagement with a research activity can improve knowledge of requirements at all levels in all stages of the research life-cycle

Disadvantages:

- Time-consuming, and could divert resources from infrastructure construction and operational duties
- Deep engagement at the cost of wider engagement

Role for CLARIN ERIC:

- Join consortia in large-scale projects as a partner and find the right CLARIN centres and allocate tasks to relevant centres and staff

Measurement:

- Count research publications resulting, and citations of those publications
- Count presentations and other publicity for the project, including counting numbers of people reached
- Log data and software outputs from the project, and measure usage of those
- Count amounts of grant funding received
- Count further new projects made possible by these collaborations and measure their income, usage, impact etc.

7. CLARIN workshops on academic research topics

Organize a conference or workshop on a theme of our choosing (e.g. workshops 'Exploring Historical Sources with Language Technology', 'Using CLARIN for Digital Research'), a general awareness event for SSH, or a workshop attached to an existing event.

Example:

- Swedish CLARIN-DH Workshop, October 2014;
- 'Exploring Historical Sources', December 2014;
- Workshops at DH2014 ('Using CLARIN for Digital Research', 'Speech resources').

Advantages:

- Fairly straightforward and easy to organize;
- Different funding models are possible, and they can be funded in partnership with other organizations, can attract sponsorship, and can be (partly) funded by participants;
- Calls for papers and participation establish a high profile across a number of communities;
- Online and social media presence for events can reach a wider audience and leave a legacy online.

Disadvantages:

- People already engaged with CLARIN are most likely to respond successfully to calls; extra efforts are required to ensure that outreach is achieved;
- Risk of holding an event without lasting outputs (i.e. slides, but no handbooks or reports or enhanced services, or projects)

Role for CLARIN ERIC:

- Initiating and organizing workshops;
- Europe-wide dissemination for calls, news and event outputs.

Measurement:

- Count numbers of applicants for places, attendees, papers submitted;
- List sponsors, partners, participation by other organizations, etc.;
- Count the number of views of the outputs (e.g. blogs, reports, tweets)
- Count new projects made possible by these collaborations and measure their income, usage, impact etc.

8. Workshops organized around key LRTs

“A bird in the hand is better than two in the bush”

Organize activities around a technology, dataset, or even 'methods' in our domain
e.g. CLARIN-PLUS workshops, or, for example:

- named entity recognition;
- cleaning up OCR in digital collections;
- language recognition;
- training and converting annotation tools to work with historical texts.

The activities would involve workshops, but also could involve mailing lists, helpdesks, special interest groups, and could lead to the development of K-Centres.

Examples:

- CLARIN-PLUS workshops

Advantages:

- Leverages our key areas of expertise and resources;
- Can attract and bring together people across disciplines;
- Calls can be marketed across disciplines to a large number of people.

Disadvantages:

- Difficult to attract people who are currently only potential users;
- Danger of only attracting usual suspects and technologists;
- If there is no direct route to publication in relevant high-impact publications result for participants

Role for CLARIN ERIC:

- Organizing workshops;
- Europe-wide dissemination for calls, news and event outputs.

Measurement:

- Count numbers of workshops and participants, and log disciplinary backgrounds;
- Count outputs (blog posts, HOW-Tos)
- Count new projects made possible by these collaborations and measure their income, usage, impact etc.

9. Creative camps

“Can we fix it? Yes we can!”

[Bob the Builder]

Creative Camps (related to hackfests and hackathons) are practical workshops at which a diverse group of people, including those with research questions and software developers, get together to work on producing some real solutions over a short but intense period.

Example:

- Travelling CLARIN Campus Creative Camps

Advantages:

- An opportunity to get some real research done and demonstrate the practical value of CLARIN;
- Deep engagement with CLARIN for participants.

Disadvantages:

- Few people directly involved;
- relatively expensive and time-consuming, especially if the outputs are to be captured, incubated and developed;
- might require project funding over a relatively extended period;
- might be difficult to get the right mix of people;
- inherently experimental and risky - hacks might fail (but failure can be useful learning experience!)

Measurement:

- Count the number of participants;
- Count and maintain a list of outputs (tools, datasets, linked data, etc.);
- Count and monitor research projects resulting (number of projects, amounts of funding)
- Count new projects made possible by these collaborations and measure their income, usage, impact etc.

10. Mobility schemes

“Get on your bike.”

Funding and support for staff to visit other centres to work on particular projects.

Examples:

- CLARIN Mobility Grants.

Advantages:

- Focussed on delivering real results in the CLARIN infrastructure.

Disadvantages:

- The open call for proposals to carry out any kind of work is reactive not strategic;
- Not currently working as an means of outreach - it would require improved marketing and promotion;
- The current scheme funds visits which are too short for carrying through new collaborations.

Role for CLARIN ERIC:

- Administering the scheme, including publicity and promotion, handling proposals, funding, commissioning reports and outputs, measuring impact;
- Seeking and organizing partnerships with external organizations to promote participation SSH centres.

Measurement:

- Count the numbers of people, centres, countries taking part (including distribution of usage by country/discipline, etc.);
- Qualitative analysis and recording of outputs (e.g. new repository software installed).

Section C: Longer-term Engagements

11. Working Groups in academic disciplines

Working groups in specific humanities and social sciences disciplines can provide a means of liaising with communities, and finding out about their requirements.

Example:

- CLARIN-D Discipline-specific working groups (and related curation and demonstrator projects – see <http://www.clarin-d.de/en/discipline-specific-working-groups.html>)

Advantages:

- Deep involvement with academics is possible;
- Working groups can be used for the cultivation of “champions” in specific communities;
- Intensive requirements gathering and user involvement are possible;
- Groups can be sensitive to local conditions and opportunities – they can be created to cater for the specific communities that exist within particular countries, and conducted in national languages;
- Working groups can be the starting point for other activities: projects, surveys, mobility schemes etc.

Disadvantages:

- Expensive - it can be time-consuming and expensive to maintain a number of groups and associated activities;
- There is a possibility that groups might go their own way, and develop in directions not under strategic control of CLARIN, and possibly not of maximum benefit to CLARIN;
- The tendency to focus on national communities might work against exploiting the potential for cross-border collaborations;
- Sustainability of the collaborations is difficult without continuous ongoing funding.

Role for CLARIN ERIC:

- Promote sharing of knowledge, expertise and experiences between countries;

- Initiate, support and promote activities linking working groups across borders (e.g. joint conferences, projects, etc.)

Measurement:

- Count the numbers of disciplines covered, participants, events and projects;
- Qualitative analysis of the effects of intervention in the communities
- Count new projects made possible by these collaborations and measure their income, usage, impact etc.

12. Get involved with a new community

"If the mountain will not come to Muhammad, then Muhammad must go to the mountain"

Engage with a new community via a major event which they hold (e.g. a major conference) by engaging in analysis, support, proposal of joint activities and partnership. The steps could be:

- send someone to a local conference of the type above
- listen to all the talks and try to identify :
 - cases where digital methods have been successfully used
 - cases where they have been used, but in a non-optimal way
 - cases where they have not been used, but where the researchers would have benefited from using them
 - analyse the cases and prepare a proposal for an activity (e.g. a tutorial or workshop for the next issue of the event, or a stand-alone awareness event) that would stimulate the adoption or better use of digital methods for this community

Examples:

- German Days of DH (Passau 2014, Graz 2015)

Advantages:

- leverages national efforts and opportunities

Disadvantages:

- opportunistic and not necessarily strategic in terms of choice of disciplines/conferences

Role for CLARIN ERIC:

- Helping to plan interventions – finding people with an interest in a particular domain across the CLARIN networks;
- Supporting CLARIN interventions by providing generic business cards, leaflets, demo and exhibition materials;
- Supporting CLARIN interventions by providing bespoke marketing materials;
- Europe-wide dissemination for news and outputs.

Measurement:

- Count the number of people reached (statistics for participants in events, categorized by country, discipline etc.);
- Count and list blogs and other reports resulting;
- List other resulting activities (joint projects, information for requirements catalogues, etc.)
- Measure duration and sustainability of relationships

13. Education and training

*Hat einer dreißig Jahr vorüber,
So ist er schon so gut wie tot.
[Goethe, Faust]*

*Give me the child at seven and I will give you the man
[Society of Jesus]*

Education and training events for students and 'early career' researchers.

Examples:

- CLARIN-DK courses
- CLARIN-D training days for PhD students

Advantages:

- Train the next generation, to help ensure the sustainability and future growth of CLARIN;
- Create a cadre of well-trained and committed champions for CLARIN.

Disadvantages:

- Embedding new courses in the university curriculum can be slow and time-consuming administratively (therefore independent summer schools are often better)

Role for CLARIN ERIC:

- Supporting the sharing of teaching and learning resources;
- Maintain a register of courses and related activities and resources (see CLARIN-PLUS and Parthenos projects);
- Supporting visiting lecturers;
- Seeking and organizing partnerships with external organizations running trans-national activities (e.g. European summer schools).

Measurement:

- numbers of courses, workshops etc. and numbers of participants
- qualitative analysis of the introduction of CLARIN-related teaching in existing courses

14. Strategic alliances

"Better to convert one chief than a thousand Indians"

Strategic alliances with organizations, associations and communities.

Examples:

- Connections with DARIAH, NeDiMAH, EADH, LDC, ELRA, META-NET;
- also the further plans for engagement in CLARIN-PLUS

Advantages:

- Efficient use of CLARIN resources if whole communities can be engaged with one initiative

Disadvantages:

- Collaborations at higher organization levels can sometimes result in boardroom meetings, resolutions with no consequences, and no connections with actual users;
- Some end users are not necessarily engaged with any associations;
- It would be difficult to engage with the very numerous mainstream organization across the many social science and humanities disciplines, leading to a tendency to focus on digital humanities and the already digitally engaged communities.

Role for CLARIN ERIC:

- Managing relations with trans-national associations.

Measurement:

- count number of members or users in associations with whom we make contact
- Count new projects made possible by these collaborations and measure their income, usage, impact etc.

Section D: Communications and Dissemination

15. Surveys of the users

“Tell me all about yourself”

Surveys, interviews and focus groups with stakeholders (e.g. users and potential users) can be used not only to elicit information about what they think about CLARIN services, and their requirements and barriers to uptake, but also to reach people and inform them about what we are doing. They might find that CLARIN already has solutions for them that they didn't know about.

Advantages:

- It is possible to make a deeper analysis of landscape, opportunities, barriers etc. ;
- Useful to identify previously un-noticed problems or areas of discontent;
- Useful if you're not sure where to start or what to prioritize, or need to show evidence of to support your decisions.

Disadvantages:

- Not directly supporting research;
- Questionable benefits for participants;
- Survey instruments tend to be either broad or deep, but not both;
- Many people suffer from survey fatigue;
- Danger of raising expectations without providing solutions.

Role for CLARIN ERIC:

- Administering Europe-wide surveys;
- Gathering, collating and analysing information gathered via activities in different countries and disciplines;
- Providing templates for user requirements gathering activities (e.g. surveys, focus groups);
- Organizing partnerships with external organizations to contact their members.

Measurement:

- Count the number of respondents;

- Quantitative analysis of responses to questions;
- Count outputs such as a requirements catalogue, gap analysis, etc.;
- Measure progress against targets for meeting requirements.

16. Success stories

“Let me tell you a story”

Examples of successful research helped by the use of LRTs are possibly the most compelling evidence of the value of CLARIN. In-depth case studies usually need to be created not by the humanities researchers who carried out the project, or the technologists, but by a third party who needs to do some research about the project and interview the participants. A case study should cover the following questions:

- Background about the academic domain:
 - What sort of research questions do people ask?
 - What are the related areas?
 - What digital tools and datasets do people use? What methods?
 - How widespread is digital research?
- The origins of the project:
 - Where did the idea come from for this project?
 - What was the starting point for this project? Was there a research question or hypothesis?
 - Was there something that couldn't be achieved without digital language tools and resources?
- Practical details about the project:
 - was there a pilot, or incubation phase?
 - did the project receive funding? From which bodies? Roughly how much?
 - what people, departments and institutions contributed to the project?
 - is it part of a wider research programme, or suite of related projects?
- More about LRTs in the project:
 - What language technologies or datasets were used? Where did you hear about them?
 - At what stage(s) of your project life-cycle did were LRTs used?
 - What were the problems and barriers to the effective use of LRT?
 - What was achieved which would not have been possible without LRTs and digital methods?
 - How were software tools chosen? What was considered and rejected?
 - Were data or tools created? What is happening to them? Are they available for re-use?
 - How is the ongoing sustainability of outcomes being addressed?
 - Were there aspects of collaborative working that were problematic/novel/exciting for you or any of the participants?
- The impact of the research:
 - Where has the research been presented and published?
 - How do your findings from the research associated with this project contribute to debates in academic disciplines?
 - Did you succeed in the research goals of the project?
- Summing up:
 - What did you learn from the project?
 - What are you working on now?
 - What would you be doing now if you hadn't joined the digital turn?

Examples:

- Probably such detailed case studies telling the full story in this depth do not exist yet.

Advantages:

- Can provide the most compelling evidence of value
- The examples, prose and arguments can be reused in a number of ways (online case studies, in presentations, in reports, etc.)

Disadvantages:

- The researchers or technologists involved in the projects often don't have the right viewpoint or perspective to draw out the general lessons for outsiders to their community, so it is necessary to do research, conduct interviews, analyse the responses and other data, and employ a good prose writer.

Role for CLARIN ERIC:

- Writing and publishing case studies;
- Translating case studies from national consortia into English (or commissioning translations);
- Publishing and maintaining a portal offering a single point of access to and curated view of case studies published across the CLARIN network.

Measurement:

- count the number of case studies;
- qualitative analysis of the research project

17. Promotion via external publications

“Publish or be damned.”

Placing articles and news about CLARIN and CLARIN activities in traditional and new media such as the general, specialist or scientific press, newsletters, and blogs.

Examples:

- Press releases for countries joining
- Articles in newsletters
- Blog posts on multi-author thematic platforms

Advantages:

- Relatively little resource required, with potential high impact
- Potential to reach new audiences
- Text and images produced for publication via our own channels can be repurposed for other platforms

Disadvantages:

- CLARIN has less control over framing and presentation, distribution, timing and measurement of readership and impact compared to use of our own publications and channels

Role for CLARIN ERIC:

- Promotion of CLARIN in Europe-wide publications
- Press releases for international channels

Measurement:

- Identify the different communities reached
- Count numbers of publications
- Count readership of publications and channels used
- Count hits and downloads of online publications
- Impact on social media: e.g. number of retweets, numbers of followers of channels used, count online comments, 'likes' on Facebook and other amplifiers

18. Paid Advertising

"Try all-new CLARIN. Now with added pan-European value!"

Paying to place adverts online or in print publications. This could be general adverts for CLARIN services, or for specific events, resources or job opportunities.

Examples:

- None so far

Advantages:

- Successfully targeted online advertising could potentially reach potential users as they search for resources and services offered by CLARIN
- Potential high visibility for CLARIN

Disadvantages:

- CLARIN might appear too corporate to academic users
- Advertisements could potentially reach large numbers of people outside of our primary user communities, and raise expectations among them that we cater for them, resulting in large numbers of contacts of low relevance and importance
- There is a direct cost

Role for CLARIN ERIC:

- Placing adverts for central services and the overall infrastructure
- Helping national consortia placing adverts outside of their country

Measurement:

- Dedicated links can be used in on-line adverts and hits counted
- Count the numbers of readers of publications in which adverts are placed
- Count hits on online advertisements

Appendix

To do

More on:

- requirements gathering activities
- intervening in social media, email lists, and other online forums
- more detail on specific education and training activities

Changes from version 2.0

Added a note on who the users are in the introduction.

Minor typos corrected.

Links added to examples of curation projects.

Some changes to the 'Success stories' questions.

'To do' appendix added.

Main changes from version 1.0

Introduced intermediate-level categorization into sections; this also involved grouping, re-ordering and re-numbering activities.

Main changes from version 0.3

Changes to the order of activities, with more rational grouping of similar activities next to each other.

Changes to the list of activities:

- 'Asking the users' renamed as 'User Surveys'

New activities added:

- Develop bespoke tools for projects
- Joint research projects
- Promotion via external publications
- Paid advertising

Changes to methods for measuring usage and impact. The following were added, where relevant:

- Grant income
- Social media noise