

Guidelines for Training Senior Volunteers

Our senior volunteers come to us with a range of skills. Some individuals have more familiarity with technology while others have more familiarity with libraries, archives, and the nineteenth century. The majority of this guide applies to training our volunteers who have the least technology familiarity.

General Technology Training

When we begin technology training, it is helpful to demonstrate a task for the volunteer first. It is essential for the volunteers performing the task to learn to master the skills themselves, but the demonstration allows them to understand the entire process first. The demonstrator should also make note of the specific steps while he or she is performing the task to be prepared to effectively teach the volunteer. Students who are working with volunteers may complete some steps for the volunteers that they will not have to use regularly (e.g. turning off autocorrect). However, students should evaluate the interest and skills of each volunteer and should try to teach them as many skills as possible that they will use regularly in transcribing and annotating.

It is an incremental process however. When we are training a new volunteer, we want to start with the most basic skills first that are essential to them successfully transcribing independently. For volunteers such as those at the Highlands at Pittsford (a retirement community) who work on laptops on their own, this means mastering turning on and logging into the computer, setting up the image viewer (we use Preview) and Word file windows, transcribing, and saving their files. As the volunteers become more comfortable with the skills they have learned, the student can add in additional skills (e.g. the Superscript, Underline, Strikethrough functions in Word).

At the beginning of technology training, repetition is the key to volunteers learning the necessary technology skills. The sessions are best kept within an hour. It is a lot of information to absorb, and especially depending on the familiarity of the volunteer with these skills, the volunteers may not be at ease during the training. Ideally, once volunteers are at a point that they are able to open the right files and set the windows up to transcribe independently, the practice they are doing when students are not there helps to reinforce these skills. Until the student feels the volunteer will be comfortable using the laptop independently, the student can focus on training when they are together, and not even send the laptop home with the volunteer until several sessions later.

One challenge in training the volunteers with multiple students working with them is that there are many ways to complete different tasks. It has been our experience that it is best to select one method and try to use it consistently among volunteers. A good example of this is how to eject the flash drives on the MacBooks. There are three methods that have been taught to volunteers, and after polling them, they do not express a preference between the methods. Instead, it seems best to select a method and for students to teach the same method consistently to the volunteers.

Up to this point, it has been best to have the volunteers at the Highlands use mice rather than the track pad on the laptops. Even when some started out using the track pads, they ended up switching to the mouse. A few volunteers have struggled with moving the cursor unintentionally when their hands hit the trackpad as they type. In these cases, turning off the trackpad when the mouse is connected is a good option. This is available through System Preferences. Select Accessibility, Mouse & Trackpad, and then Ignore built-in trackpad.

Despite the challenges of working with multiple windows on a laptop screen, the volunteers have all done remarkably well at learning to resize and move the windows. The most frequent reminder has been that the image files have to be resized at the edge of the window rather than the edge of the letter image.

The menu bar for Macs can be an adjustment for volunteers. The functions that are available in the menu bar are associated with the active window, and it is good to make note of this. When they have most recently been working in the Preview window with the letter image and try to use a Word command in the menu bar, it can be confusing. Explaining that the menu bar is tied to the window last clicked on because the computer only has that information to know where the user is working helps. Pointing out the grayed out inactive menu bars versus the active menu bar can also be helpful.

To assist the volunteers, we developed a technology guide. The first version contained step by step instructions to open and save files, resize windows, and eject flash drives. It is helpful initially, but they were still struggling to remember the steps that went into setting up, working on, and saving a transcription session. We added a cover page that lists all the steps from turning on the computer to ejecting the flash drive, and that has proved to be the most useful tech resource for the volunteers who started with the least tech familiarity.

Project Files

Saving files has been the hardest technology concept for volunteers. With our less technology-familiar volunteers, we use flash drives to store the digitized images of the manuscripts and their Word file transcriptions.

Folders on the flash drives tend to be complicated for volunteers with less technology familiarity. Initially we thought that folders would help make the files more easily accessible for the volunteers, but we learned that the different organizational levels cause more problems than having files ungrouped in a longer list. To address the issue, volunteers access their files in the main section of the flash drive, and the volunteer manager has one "Completed" folder that contains and hides a system of folders to move completed letters into a folder for each term when it is completed. This provides a copy in case the files are not uploaded or do not transfer properly to Box, but it does not give volunteers any more folders. Their main interface on the flash drive remains consistently curated by the manager who transfers completed files and assigns new letters.

Saving Word files with the proper file name (e.g. 18381215WHS_FMS1v1) was also a significant challenge. Much of the confusion was remembering to use the Save As option to save the file to the flash drive and enter the file name, but there were also difficulties successfully naming the file even if it was saved in the right place. To address this challenge, the volunteer manager creates and saves a new Word file with the proper naming structure for each letter the volunteer is assigned. Volunteers are taught to open the Word file already saved on their flash drive and to use the Save option to save the changes to their transcriptions. Overall, this is one compromise on doing part of the standard duties for transcribers that saves student editors enough time not having to sort through confusing and duplicate files that it is worth the volunteer manager taking on the extra time involved in the set up.

The volunteers who are more familiar with technology have been added to Box. The project staff work out of Box, and it helps to simplify the process if they are comfortable enough with using it instead of the flash drive.

Transcription

The volunteers need little training for reading the manuscripts, and it is usually their favorite part of the process. Volunteers are taught the specific functions in Word that are used the most in transcribing. We start with Underline, Strikethrough, and Superscripts, and as they advance to annotations, we teach them to insert footnotes.

Learning all of the transcription guidelines for our project takes some times. They largely learn the principles through the transcription guidelines we provide them. However, as with project staff, there is often no substitute for answering questions about specific scenarios when students are working with volunteers.

Once volunteers have mastered the basics of logging in, resizing the windows to transcribe, and saving files, the emphasis for the student is helping to ensure the transcription guidelines are being followed. The volunteer may come with specific questions, but the student might notice areas that need improvement and may then address a few of those a session to gradually improve the quality of the transcription. Some of the volunteers are learning a lot to master the technological skills, so it may be a multi-step process, but it is better to progress slowly rather than overwhelm the volunteer with more information than he or she is able to process in a session.

Annotation

Once a volunteer is comfortable with transcribing letters, the volunteer manager will work with the volunteer to determine the interests and skills of the volunteer. Some volunteers really want to dive into annotation and do research to find new people who are not already in our databases, and others may only use the database to annotate people who have already been identified.

If they do not already know how to insert footnotes, volunteers are first taught to insert footnotes for any people, places, or works of literature that are mentioned in their letters. At this early stage, the list of three-letter IDs of commonly encountered people is

a useful tool, and they are able to add this information to their footnote without having to access the database.

After they seem comfortable with this, the next step is training the volunteers to use the databases to search for less frequently encountered people who have already been identified and added to the database. Navigating the online archive and searching the databases can be challenging for volunteers with less familiarity with browsing the internet, and repetition and practice helps them become comfortable with this step. For volunteers with more internet experience, they are building on their general knowledge to learn the specifics of navigating our project databases, and it is an easy process for them.

Some volunteers have undertaken the last steps of annotation and are identifying people mentioned in the letters who were not in the database. They use our various annotation tools to locate biographical information and include links in their Word documents for their student editors to add to the database. This is incredibly helpful for the editor who only has to verify the accuracy of the information (as they would when peer-editing) and add the information to the database.

Some volunteers are not interested in or do not enjoy this level of annotation. We determine the level of annotation that matches the interests and skills of the individual volunteer. Most volunteer transcriptions are partially but not fully annotated. To ensure two people are involved in annotating, we modified our editing procedures for volunteer transcriptions.

Editing

Student staff members edit the volunteer letters currently in a modified version of our project workflow among the project staff. In our standard project workflow, students work in peer-editing partnerships, and transcriptions go through 3 stages. Using the digital images for the letter, the student transcriber creates the initial transcription and is responsible for completing all the annotations and adding any newly identified people to the database. His or her editing partner reviews the transcription and makes suggestions for changes using Track Changes and adding comments. With his or her editor's feedback in mind, the transcriber updates his or her transcription that is then reviewed by Professor Slaughter against the original manuscripts.

For volunteer transcriptions, the volunteer creates the transcription. This file moves to the first student editor who edits the transcription and any annotations the volunteer completed. If annotations were not attempted or only to a limited degree, the first editor must complete those annotations, including adding new entries to the database. The edited file then moves to the second student editor who reviews the file in the same way as our other peer-editing partnerships. The second editor makes transcription and annotation suggestions that are returned to the first student editor. After the initial editor makes revisions to the transcription, the file is sent to Professor Slaughter for him to review it against the original manuscript.

We provide the volunteers with different types of feedback on their transcriptions and annotations. New volunteers particularly need feedback on their first transcriptions to help them improve the quality of their work. For most volunteers, the volunteer manager reviews the volunteer's recent work and provides general feedback about the top few things she identified for that volunteer to improve. For volunteers with less technological familiarity, this works better than giving them the Word files with Track Changes edits. For volunteers comfortable with Word and Track Changes, some of them prefer to see the specific edits, and we give them their edited files.

The extra round in the editing process has been incredibly beneficial in improving the quality of the final transcriptions and annotations, but it does make the editing process a little longer than the staff's. We have found that our biggest workflow challenge is predicting how quickly volunteers will complete and return transcriptions. We have deadlines for staff to complete assigned transcriptions during each term, but we do not impose deadlines on the volunteers. Instead, we learn to adjust to the rhythms of a particular volunteer's schedule and commitment to transcribing and assign letters accordingly.

We want volunteers to always have images available to work on transcribing, but for those who are using flash drives, meeting in person is required to collect completed transcriptions and distribute new images. Some volunteers are incredibly prolific transcribers and consistently meet with us, but others meet with us more irregularly. Beyond their regular schedules, all of our volunteers have planned and unplanned life events that impact their schedule.

We understand this and remain flexible, but it can be difficult to predict when we will be able to pass volunteer transcriptions on to editors. We now evaluate the status of assigned letters eight weeks before each deadline. We reassign letters that will not be completed by our target date, and start assigning letters that we plan to collect at the following deadline instead of the upcoming one.

We understand that our volunteers have busy lives, and we are thankful for the time and energy they are willing to devote to our project. They bring unique insights to their transcription and annotation efforts and excitement and curiosity to our collaborative sessions. We will continue to update these guidelines as we learn from our collaboration together.