This workflow was developed at an iDigBio workshop in January 2015. The most recent version is available at https://github.com/iDigBioWorkflows/FlatSheetsDigitizationWorkflows and https://www.idigbio.org/content/workflow-modules-and-task-lists.

Appendix S12. Module 12: Organizing and Implementing a Public Participation Transcription Blitz

Task ID	Task Description	Explanations and Comments	Resources
T1	Identify expenses and funding source.	These might include snacks/drinks, artwork for event-branded items, event-branded items, and prizes for transcription games and/or raffle. Funds could include crowdfunding campaigns.	Crowdfunding sites (e.g., https://experiment.com/). See iDigBio's blitz kit for possible games: https://www.idigbio.org/wiki/index.php/WeDigBio/blitzkit
T2	Identify specimens targeted for transcription.	Consideration might be made for how compelling the circumscription might be when advertising event. For example, in-state specimens might be of greatest interest to local participants.	
T3	Identify source of information for transcription.	These can include either physical specimens or digital images of them.	
T4	Determine if specimens require pre-digitization curation.	For example, if the source of information will be the specimen image, the folder information will potentially be disassociated from it in the computer interface. This could occur if a skeleton record with that information is not created at the time of imaging and would require the creation of an annotation with that information on it.	Module 1: Pre-digitization Curation.

T5	Identify image display interface.	Required if the sources of information are digital images. This could include lightweight image viewers.	Stand-alone image viewer (e.g., Apple's Preview) or web browser
T6	Identify transcription interface.	This could be the typical data entry form used by staff, but crowdsourcing tools such as Notes from Nature have streamlined these often complicated interfaces. There will be tradeoffs between the amounts of data collected and training required.	Module 10: Selecting a Database. Database front-end or online crowdsourcing platform (e.g., Notes from Nature http://www.notesfromnature.org/, DigiVol http://volunteer.ala.org.au/, Herbaria@home http://herbariaunited.org/atHome/)
T7	Produce sufficient number of digital images for event.	Required if digital images are the source of information.	Modules 3–6 (Imaging modules). Imaging station.
T8	Identify strategy for uninterrupted flow of specimens during event.	Required if physical specimens are source of information. See T2 in Module 8: Organizing and Implementing a Public Participation Imaging Blitz for information on flagging specimens prior to event.	Module 8: Organizing and Implementing a Public Participation Imaging Blitz.
T9	Queue images at transcription platform.	If using a transcription platform.	
T10	Create artwork for event.	If a participant incentive includes an event-branded item.	Artist or designer.
T11	Order event-branded incentive gift.	Required if a participant incentive includes an event-branded item.	Branded merchandise companies (e.g., cafepress.com http://www.cafepress.com/).
T12	Identify event leaders.	These will serve as transcription mentors during the event, and their availability	Herbarium staff or other experienced

		should be determined prior to establishing a date and time for event.	transcribers.
T13	Identify date for event.	Taking into account timing of other (potentially competing) events and calendar for space availability and parking.	Institution's calendar, local newspaper's entertainment calendar.
T14	Identify and reserve space for event.	Can be a computer lab, if source of information is digital image. Projector and screen can be useful for introduction and training on day of event.	Institution's space reservation calendar.
T15	Identify and reserve parking for event.	For universities, home sports events can significantly curtail parking availability on the days that they occur.	Institution's parking reservation calendar.
T16	Establish registration strategy.	Can include registration software that requests participants' contact information (e.g., Doodle Poll Premium).	Registration software (e.g., Doodle Poll Premium https://doodle.com/premium).
T17	Establish advertising strategy.	Can include local media (e.g., newspapers and TV), social media (e.g., organizational Facebook pages), listservs, in-person announcements at events (e.g., local chapter of a native plant society). Specify useful skills (e.g., typing) and minimum age for participation (participants as young as 12 have successfully participated). Event artwork can be used for advertising.	Institution's communications office. Social network, blogging, and email infrastructure.
T18	Create post-event survey.	Topics could include questions regarding increased familiarity with biodiversity specimens and collections, satisfaction with aspects of the event, likelihood of participation in the future, and participant background.	Professional evaluator (if available). Google Forms (http://www.google.com/forms/about/?gclid=CNeavuzm88UCFYUUHwodKFkAaw) and Survey Monkey (https://www.surveymonkey.com/) provide simple methods for creating online surveys.
T19	Write introduction	Can include PowerPoint presentation	Presentation software

		to event.	and handouts.	(e.g., PowerPoint).
T20	Write training content.	Can include PowerPoint presentation and handouts.	Presentation software (e.g., PowerPoint).
T21	Establish computer logins.	Some computer-lab classrooms have a single visitor log-in account, which simplifies this step.	Institution's IT department.
T22	Plan event schedule.	Event schedule could include a 10-minute introduction to the collection, a 10-minute training, and at least one break for, e.g., coffee, donuts, bottled water. The event could also include games (e.g., Habitat Bingo, Timeline Tracker, Geo Locator).	iDigBio's Transcription Blitz game series: https://www.idigbio.org/wiki/index.php/WeDigBio/blitzkit
T23	Communicate event logistics to registered participants.	Can include map of parking and event location, and cell phone number of event leader.	Email software.
T24	Recruit event photographer.	Can be an event leader.	Camera or mobile device with good-quality camera and flash.
T25	Recruit social media communicator.	Media communicator to be active during event. Communicate event hashtag to participants.	Social media platforms (e.g., Facebook, Instagram).
T26	Acquire volunteer waivers.	Required if institution has official forms for volunteers to fill out at event. If institution requires receipt of forms prior to participation, could include them in the logistics communication.	
T27	Create nametags.	Can include event artwork on nametag. Print a few blanks for those who show up without registering.	Name badge labels (e.g., Avery® Flexible Name Badge Labels, 2 1/3" x 3 3/8") and word processor template for printing to them. http://www.avery.com/avery/en_us/Products/Name-Badges/Name-Badges/_/dimensions-2-1-3-x-3-3-

			8/?Ns=Rank%7C0%7C%7CProduct%20Number%7C1&N=4294967259+4294964846
T28	Purchase prizes.	For transcription games and/or raffle. A raffle ticket can be given to a participant for, e.g., every fifth transcription completed.	Museum store or university bookstore, which might provide prizes at a discount.
T29	Hold event.	Arrive early to prepare technology, space, and registration table. If there are multiple locked entrances to the building, place signs at entrances not in use to guide participants to those that are in use. Tell participants where to find nearest restroom.	If there are multiple locked entrances to the building, place signs at entrances not in use to guide participants to those that are in use.
T30	Distribute post-event survey.	In last 15 minutes of event.	
T31	Articulate thanks and distribute incentives.	In final minutes of event.	Incentive gifts.
T32	Take group picture.	For follow-up reporting on event. If taking photo outside, can do so after event ends.	Camera. Photographer.
T33	Quality control.	E.g., sampling of small number of each user's transcriptions to determine systematic errors. Quality control should happen periodically throughout the blitz by trained staff to mitigate recurring errors and should also happen at the end of the blitz by trained staff to ensure accuracy.	Transcriptions.
T34	Migrate data back to local specimen data management platform.	If not using local specimen data management platform for transcriptions. Might require coordination with a transcription platform.	
T35	Analyze post-event survey.	Determine frequency distributions for the answers.	Professional evaluator (if available).
T36	Create event report to communicate results.	Could be blog post.	Institutional or project blog.