



READY, SET, CURATE

8 Learning Experts
Tell You How

Edited by

BEN BETTS

ALLISON ANDERSON

READY, SET, CURATE

• EDITED BY •
BEN BETTS AND
ALLISON ANDERSON

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FOREWORD

In his seminal work, *The Fifth Discipline: The Art & Practice of the Learning Organization*, Peter Senge wrote, “Through learning we re-create ourselves. Through learning we become able to do something we never were able to do. Through learning we perceive the world and our relationship to it. Through learning we extend our capacity to create, to be part of the generative process of life.”

No statement could better highlight what learning in the workplace must accomplish now more than ever. Our challenge—and our opportunity—is to enable learners to accomplish things they have never done before, thrive by understanding the rapidly changing world around them, and in so doing, grow in their capacity to perform. Unfortunately, our traditional models lack the flexibility to fully promote a 21st-century workplace literacy. It is, therefore, exciting to see the innovations that are emerging in our field and the opportunities they present for greater literacy.

As a senior learning executive in the U.S. intelligence community, I’ve observed during my years in the field that the foundation of these innovations is a shifting view of learning content, including where it comes from and how it is used, reused, or updated in the context of the changing world in which our learners operate. With this observation, our views on how learners access, interact with, and even contribute learning content also change. Meanwhile, the potential content for learning is voluminous and ubiquitous, but not of equal efficacy. Thus, the case for high-quality digital

curation becomes compelling in order to lead learners to valuable learning “artifacts” and help make sense of them. But as we learn in *Ready, Set, Curate*, curation can take a variety of forms and requires us, as learning professionals, to continue to evolve our approaches to content.

My first experience with the potential of digital curation occurred almost 10 years ago—before we were using the term. My team was responsible for delivering a course to remind those working overseas of the evolving types of security threats they face and the principles of how to deal with them. The Overseas Security Awareness Refresher Course (OSARC) was an online, “next button,” mandatory learning experience. No one wanted to take it (sound familiar?), arguing that they live the threats every day. They had a point, to a degree. But we had to provide something, both because the course was mandatory and because we believed it necessary to help keep our colleagues safe. So in a redesign session I asked, “What if we allow course participants to share specific threats they have encountered and how they applied the principles in their unique situation?” This represented a big shift in how we thought about learning content, and it changed everything! OSARC became a digitally curated learning resource. The stories participants provided were “artifacts” that helped other learners not only learn but unlearn and relearn as specific examples of threats and responses were curated from around the world. This redesign was successful because it did what Ben Betts and Allison Anderson point out in the introduction: It enabled our learners to “create value from their knowledge and find expertise in the organization” in the context of their reality. It also improved organizational literacy on security threats and responses.

I recount this experience to emphasize the power of digital curation for learning content, as long as it’s done right! And that’s the key, as David Kelly points out in chapter 8, reminding us that “there are plenty of tools out there described as ‘curation tools’ and people who identify themselves as ‘curators’ without a true understanding of what that term means.” Although I probably shouldn’t admit it, with OSARC, I thought that we lucked into success without really knowing what it would take. We could have just as easily failed.

Fast forward to today. I am delighted to see this thoughtful work just when we should be focusing on high-quality digital curation of learning content. *Ready, Set, Curate* affords readers an opportunity to assess how digital curation can improve organizational literacy, both broadly and in the context of their specific learning challenges.

The first two chapters jump right into the topic by helping us understand the paradigm shift from a traditional “learning mindset” to a “curation mindset” and by outlining a process to build a solid curation strategy. The subsequent chapters offer a comprehensive look at digital curation. They focus on the important opportunities it creates in our field, such as maximizing the potential value of individual and organizational knowledge, as Tony Sheehan describes in chapter 4, and fostering greater collaboration in our learning environments, as Allison Anderson shows in chapter 5.

The book also presents an honest look at the challenges of digital curation, along with thoughtful consideration of how to address them. In chapter 7, Michelle Lentz raises the issue of complying with copyright laws and licenses that govern content, clearly explaining how to stay out of trouble while extending your community reach. I’m also struck by Robin Good’s musings in chapter 9, particularly when he states that “in the near future, curation may directly affect the way competencies are taught, how textbooks are put together, how learning about a subject is presented, and . . . the value that can be generated by the simple practice of curating content.”

Additionally, the case studies illustrate different approaches contributors have taken with digital curation; they have something for everyone. In chapter 3, Armando Torres provides the most complete example, looking at Intel’s learning environment, which serves more than 6,000 engineers worldwide. I found it valuable in understanding implementation issues, defining the target learning audience, developing the platform and structure of the curated environment, and clarifying the roles and level of effort needed. In chapter 5, Allison Anderson continues this thread, discussing a small-scale case using the platform Scoop.it. She illustrates issues related to managing the content itself, including editorial concerns and the risk of duplication of effort.

Finally, in chapter 6, Ben Betts answers a lot of the questions we all have about how to create e-learning, mainly how much content should be curated and what the design will look like. The chapter also serves as an invaluable guide through storyboarding a course.

Ready, Set, Curate represents a bold step forward in defining how we, as learning professionals, can promote 21st-century literacy in our organizations through high-quality digital curation. I hope you enjoy your journey!

Bob Baker
Washington, D.C.
September 2015

Curators see the gaps between content, breaking it apart to build it back up in new and interesting ways.

Curation can be used in many different ways, such as to:

- Support a formal learning program or event.
- Complement a higher education curriculum.
- Provide performance support.
- Develop a community of practice.
- Bring people together to form a community.
- Pull together conference proceedings and related resources.
- Create a conference experience.

Ready, Set, Curate takes the act of curation out of the museum and places it squarely on the web. As Internet users, we collectively produce millions of digital objects in the form of videos, blogs, news articles, research, debates, tweets, pictures, and more. The barriers to content creation and delivery have fallen, but the exponential rise in the amount of new content has left us with a problem: Information is accumulating everywhere. A Google search for *curation* brings 4.3 million results; *information overload* brings 18.2 million results. This mix contains a world of rich content, as well as a lot of trash. If you want quality information, on whose substance you can rely, you need a personal recommendation. What you need is a curator.

We hope you will come to see that curation is a key topic for both learning organizations and individuals. Organizations that practice high-quality curation will find themselves able to do more with less, create value from their knowledge, and find expertise within their organizations. Individuals who adopt curation practices as part of their personal knowledge practices will find themselves better equipped to adapt and more ready to learn than their counterparts. It's a brave new world. And we won't write any of it.

About This Book

What is a book about curation without curated content? We've invited some of the leading experts on curation to consider the ways that curation is changing what we do and how we do it.

Chapter 1, "From Content to Curation" by Ben Betts and Nigel Paine, examines how we got to a place where curation is vitally important to the work

we do. This chapter offers a view into our transformation to an environment where content creation takes a backseat to thoughtful curation, and explains the shift in perspective from a learning mindset to a curation mindset. The authors also explore four ways to approach curation to benefit your organization.

Allison Anderson outlines the basics of a good curation strategy in chapter 2, “Creating Your Curation Strategy.” She takes you through some of the key considerations that curators face, and provides a solid curation process that you can follow or adapt to your specific purpose.

In chapter 3, “Case Study: Curating in the Corporation,” Armando Torres, a training manager for a software group at Intel Corporation, describes how curation within an organization can take many forms and involve even more players. In his example, the learning and development department developed a strategy for its engineers to participate in ongoing curation efforts. The department also built a software learning portal to serve as a landing page for curated content.

Knowledge management expert Tony Sheehan reframes the curation argument from the knowledge angle in chapter 4, “The Knowledge-Curating Company.” He looks at the value of organizational knowledge and asks us to consider the boundaries between learning and knowledge both within and outside our organizations.

Curation is a natural extension of and support to communities of practice. In chapter 5, “Collaborative Curation,” Allison Anderson asks how curation can form a community, and how it supports the community. This chapter looks at some of the benefits of collaborative curation, and offers some insights on how to make it successful.

Chapter 6, “Curating Formal Learning” by Ben Betts, asks what it looks like to embed curation activities into a formal learning program. This chapter covers why and how curation works by looking at the fundamentals and how you can put some rigor into your efforts. Then, see the principles in action through a case study of one such program.

Chapter 7, “Curation, Copyright, and the Creative Commons” by Michelle Lentz, provides an overview of copyright in the digital age, the legal ramifications of curation, and the best practices of referencing and sharing your digital discoveries.

David Kelly became one of the best-known curators in the learning and development profession through his personal habits of curating conference

“back channels” all over the world. In chapter 8, “Case Study: The Accidental Curator,” the master of conference curation takes us through his personal journey of offering his curated reflections to conference attendees as well as the wider public.

Finally, in chapter 9, “The Future of Education,” Robin Good, a passionate advocate of digital curation, lays the groundwork for what he believes will be the curation revolution in our educational and work lives.

• 2 •

CREATING YOUR CURATION STRATEGY

Allison Anderson

Curation is both relatively straight-forward and a bit complex. To make it most successful within the organization, it will help to establish a clear process. To establish a curation process, the first step is creating a strategy. A well-designed strategy provides structure to manage a continuous process and a steady volume of content. As you begin to build your strategy, ask yourself a few fundamental questions to determine your purpose, process, players, and tools:

- Why are you curating? For whom?
- How will you curate materials and resources?
- Who will curate? Who else is involved?
- What tools do you have at your disposal, and which one(s) will be most helpful in accomplishing your objective?

Your answers will provide clear direction to your learners on how to contribute and, as a result, encourage participation. A solid strategy helps you focus your efforts on the right topics at the right time, by the right people, and for the right purpose. Let's look at each of these in more detail.

Why Curate?

As with any design for organizational learning, two key questions must be answered first:

- Why are you doing it?
- Who is your audience?

Begin with the “why?” What purpose, need, or gap are you addressing? It may be as simple as personal aggregation and organization of vast quantities of information. Or, it may be as complex as curating in support of a community or a formal learning program. Your purpose will inform the overall plan and affect how you’ll approach the subsequent elements of the strategy.

Some possible purposes for curation include:

- supplementing formal programs or courses
- gathering resources for personal use
- driving innovation
- helping others keep tabs on the latest industry trends
- reducing the need to develop new content.

Hand in hand with understanding your purpose is the need to understand for whom you are curating. Curating for a faceless, nameless population of Internet passersby is quite different from curating on behalf of your senior leaders, for example. The more targeted the audience, the clearer your mission becomes. A targeted audience and specific purpose provides extreme focus for your curation, which may also create additional complexity or work for you, the curator.

Curation in which you gather a large cache of resources for a large population is relatively straightforward because you are cutting a wide swath—gathering a wide variety of content with little analysis. With a broad audience, you know you cannot meet all the needs all the time. As such, there is less pressure to find exactly the right sources or to fully analyze and contextualize the content you gather. It is likely that someone will find any single resource useful, and no one will find all resources useful.

In comparison, when the curation need is specific, the onus is on the curator to analyze each potential item for its relevance and veracity. A targeted group, such as an executive council, has specific goals, and each curated item should have some relationship to those goals.

Think about your scale: Are you gathering resources in support of a personal project, or to create a conference archive? Is this for a community or other collaborative group? Are you collaborating at an industry level? Or, are you curating in support of learning objectives targeted to external customers? Answers to these questions will steer you toward different processes and tools.

Should Your Audience Do the Analysis?

An alternative method in the targeted environment is the option of curating an array of resources, and then asking your audience to do the analysis for you. In fact, collaborative evaluation of the content may be the first step in a longer-term curation project. For example, let's pretend you're the manager of leadership development in your organization. You may provide a content resource center for ongoing support of leaders, while simultaneously running a cohort of new managers through an onboarding program. In this case, you may want to curate a wide variety of resources, ask the cohort to provide analysis and feedback, and use this as a way to vet the content's usefulness. This feedback may lead you to bring some of those new resources into your resource center, having obtained a "seal of approval" from the audience.

How Will You Curate?

Curating with intention, in service of a specific purpose, requires a solid tactical plan. Understanding your process up front will facilitate a better experience for both the curator and the consumer. Here are some specific areas to identify:

- How and where will you find sources?
- How will you determine what to use and what to ignore?
- Do you plan to analyze and contextualize the sources?
- Is curation moderated? Is there an approval process for what gets posted?
- Is there a process or cadence for how often you'll curate, or how you'll publish what you curate?

An interesting consideration is whether or not to automate any part of the process. Opinions and philosophies on this vary, but it is possible to automate the aggregation process somewhat. Despite becoming increasingly more sophisticated, aggregation tools are actually becoming easier to use. One simple, commonly used example is Google Alerts. Set up properly, content on a given topic, with specific parameters, can be delivered daily or weekly. Automated aggregation can also be combined with strong search practices and serendipitous discovery. For our purposes, we'll build a bit of automation into a much broader process. The curation process involves four steps:

- Locate and gather.
- Evaluate and select.
- Analyze and contextualize.
- Organize and publish.

LOCATE AND GATHER

The first thing you'll need is a pool from which to draw. How will you gather resources for review? Do you bring in as many items as you possibly can and then evaluate their veracity? You can't use (curate) what you can't find. But, being a good curator doesn't (necessarily) mean spending hour upon hour of time searching the whole of the Internet for relevant articles.

Aggregation can be a good first step in the process of gathering content. Aggregators such as Reddit, StumbleUpon, and Google Alerts can help you gather a pool of resources. Or, you may choose to follow a set of trusted advisers or track industry-specific sites. You may even end up curating from other curators! (However, if you do this, remember to track back to the original source for appropriate citation.) Whatever way you approach this gathering process, you'll want to vet those resources to make sure they are reputable and useful.

While aggregation tools can be a tremendous help in your curation strategy, do not mistake this automated gathering of resources as your primary curation activity. The aggregation of content is only the first step in the process, not the final one. "Aggregation is automated," as Robin Good points out, but "curation is manual" (Good 2010). Find tools that can automatically gather a set of resources, as well as filter and organize them if possible.

EVALUATE AND SELECT

This leads to the next step. Now that you've gathered a number of resources, it's time to determine which are right for the story you want to tell your audience. Clay Shirky asserts that “[the problem] is not information overload. It's filter failure” (Asay 2009). That is to say, the right tools to manage the information available don't yet exist. Instead, a good curator must act as that filter by gathering and aggregating large amounts of information and selecting only the best (or the right) items to share with others.

There are generally more resources than one person can adequately sift through for any given search. Technology helps put the right lens on the resources we gather, so that we hone in on the right item for our purposes. These are the filters Shirky is talking about. But there is also concern about whether this level of filtering (also characterized as personalization) is detrimental. Websites that “learn” us in order to make finding, reading, viewing, or shopping easier may also be creating what Eli Pariser (2011) terms the “filter bubble.” Is it possible that our window into the web is *too* narrow? What are we missing by employing filters? Some may say that what we *want* to see is not always what we *need* to see. If we are in the process of learning about or upskilling on a topic, for example, we probably don't know all of the best terms to search. Can we expect our search engine to determine that for us? There's something to be said for the serendipitous discovery of tangential information. Discovery leads to connections you may not have made yourself, which may lead to new ideas, which may lead to innovation.

As you amass your resources, evaluate:

- Is it useful?
- Is it true?
- Is it from a reputable source?
- Is it timely content or evergreen?

You'll also have specific criteria to evaluate, based on your purpose, audience, and topic. Those criteria will vary from situation to situation, but the fundamental question remains: Does the resource support your objectives?

ANALYZE AND CONTEXTUALIZE

Contextualization and analysis set curation apart from simple resource collection. Good curators go beyond merely gathering and posting resources, and see themes and connections that might otherwise be missed.

Today's curation tools offer the ability to provide this analysis. Scoop.it, for example, melds a curated item with thoughtful reaction. Users create pages reflecting topics of interest and add insight to the items that they "scoop" onto their pages. This is a way to add response or engage in a dialog with the resource. It can also spark conversation among your readers by asking: Here's my reaction, what's yours?

ORGANIZE AND PUBLISH

Finally, how will you organize and present your resources? The classification and presentation of curated resources helps contextualize them and ensures that you'll be able to retrieve content at a later time. You'll need to identify an initial taxonomy for the curated content, similar to a library classification system. This could be simple categorization or a complex tagging structure. Whatever your approach, a practical taxonomy is important. Consider whether you will prescribe the taxonomy of categories and tags or whether those in the group will begin this process and create the taxonomy as they go along. Will you require tagging in order to add materials to the collection?

"Responsible maintenance" is an important principle of good curatorship. This is where a content strategist creates structure using taxonomies and other classification schemes, relationships (ontologies), and works with standards (SEO, semantic web, effective metadata) so content can easily be cross-linked and dynamically served within the site as well as more effectively integrated in cases of syndication. (Scime 2009)

How will you maintain your collection? Is there a shelf life for your content? Will you track metrics about usage or usefulness? How will usefulness be determined? You may opt to publish curated resources and leave them posted indefinitely, or you may find that you need to further prune or add commentary. Imagine how or if you will manage the resources moving forward.

Who Curates?

Digital curators provide analysis, contextualization, and commentary for their resources—not unlike what museum curators do with artifacts. Good curators are additive; they provide the tone, offering a point of view based on their expertise, insights, and opinions. It is this point of view that sets curation apart from collection. Who curates matters, both from a perspec-

tive of quality and of process. But how do you know who should take on that responsibility?

Curator's Tip

A curator I know facilitates the ongoing curation process by carving out 30 minutes a day to find and analyze new content. Another reserves one hour every Friday afternoon. This makes a daunting task more manageable. It also helps create a habit. Users look to consistent sources, and intermittent content is likely to get lost in the signal-to-noise ratio. No matter who does the curating, it's a good idea to make it part of the natural routine, both for your sake as a curator and the sake of the learner.

There are many ways to decide who will curate in your community or organization. Two common approaches are the expert as curator and the L&D professional as curator.

EXPERT AS CURATOR

For deeper analysis on a specific topic, the expert-as-curator model is ideal. However, using a trusted subject matter expert (SME) brings its own challenges: Is this an official part of someone's job? Is the curator to be compensated?

You'll also want to think about how you engage with this person. The SME may act alone, or it may be a collaborative effort—perhaps the L&D professional manages the aggregation of a resource pool and the SME works hand in hand to evaluate the accuracy and usefulness of the material.

L&D PROFESSIONAL AS CURATOR

In a 2014 report from the Corporate Executive Board, the authors noted that “effective L&D professionals will need to become trusted curators, who find, filter and, in some instances, modify information for employees, while equipping learners to be critical evaluators of the information and content they receive” (Handcock and Harris 2014). Likewise, according to a 2014 report by Bersin by Deloitte, “One of L&D's most important functions is the curation of existing learning elements and information” (Mallon and Johnson 2014).

Today's L&D practitioner is intimately involved in the curation process. As more content is created, it becomes even more necessary to have a trusted adviser who both filters and offers a unique perspective. In some cases, experts may provide analysis and context for curated resources. But more often, those in the L&D function will be required to develop and execute a curation plan. This may be done in partnership with an SME, or they may upskill and develop enough expertise to support a curation strategy.

Let's also consider the development of a learning curriculum. Members of the development team may use curation and curation tools as a way to gather ideas and examples. The addition of analysis and the opportunity to comment and examine a collection of the best resources is key to curriculum development.

INDIVIDUAL VERSUS COLLABORATIVE CURATION

In our interconnected, user-generated world, a premium is placed on collective intelligence. Wikipedia and YouTube are perhaps the most universally recognized examples of how well we've capitalized on our global collective intelligence, but there are thousands of examples of the whole being greater than the sum of its parts. Even sites such as Reddit and BuzzFeed—while not universally used and very different in purpose—are popular public collections of content. LinkedIn groups are communities of professionals coming together to share their thoughts as well as their resources. People routinely collaborate on Scoop.it and Pinterest boards.

So, does this mean that two curators are better than one? Possibly, but not necessarily. We'll take a deeper look at collaborative curation in chapter 5, but Table 2-1 shows a review of the benefits and challenges of having a single curator versus enlisting the help of others. To evaluate which is the best path for your situation, think back to your purpose, topic, and audience.

OPEN CURATION: CONSUMER VERSUS CONTRIBUTOR

How will you involve others in curating a topic? Your curation strategy—whether for a small group or open to all—involves an audience. These are your consumers, the people who will be accessing and using the content and resources you provide. Thinking of your audience as consumers is a reminder that customer service is a key element of curation. How will the resources help, affect, and serve your customers and their needs? Have you made the collection easy to find and easy to understand?

Table 2-1. Individual Curation Versus Collaborative Curation

Individual Curation		Collaborative Curation	
A single curator. For example, using a personal or individual blog to gather resources.		Multiple curators designated to gather and post at a single location.	
Advantages	Possible Challenges	Advantages	Possible Challenges
<ul style="list-style-type: none"> • Clear point of view • Easier to be consistent with tags and architecture • Good for individual research and interests 	<ul style="list-style-type: none"> • Limited point of view • Even curators suffer from information overload 	<ul style="list-style-type: none"> • Diverse thinking: broader perspective on topics • Helps escape the “filter bubble” • Less work required (potentially) • More people benefit from the content 	<ul style="list-style-type: none"> • Diluted message: too many points of view • Tagging inconsistency • Curator confusion: is my resource redundant?

Perhaps more important, you need to figure out how your customers will interact with the content. Are they simply consumers of content, or will you invite them to contribute as well? As you set your strategy in motion, consider whether your customers will (or should) become contributors. While best practice generally indicates that collaborative content is preferable to the Sage on the Stage model, this is not always a given—the consumer as contributor is not always appropriate. For example, if you are curating material about regulatory requirements, you’ll likely want to limit who can contribute (or at least institute a vetting process).

If your focus is on the expert as curator, you may want to closely monitor comments and contributions from your consumers. For example, imagine that you are curating materials about corporate benefits. When you line up a few key experts to gather content on new guidelines for medical leave in organizations, you may want to be sure that all submitted comments, articles, and resources are mediated to pass an accuracy review. In a more extreme case, you may also find that your topic or situation necessitates that your consumers not be allowed to comment or contribute. This may

be especially necessary for legal and regulatory topics. Topics that tend to be confidential in nature may require an expert to gather and post without comment or addition from other contributors. While these situations limit the power of the collective, it may be necessary in areas of compliance or legal content.

Choosing Curating Tools

In some ways, the plethora of tools is what is driving the new excitement about curation. Where there were once simple social bookmarking and RSS feeds, there now are much more visually engaging, powerful tools at our disposal, which provide a flexibility and ease-of-use that did not exist before. If you—like millions across the globe—have started using Pinterest, you’ve already started curating for your personal interests. This tool alone has made it easy for anyone to gather and manage resources, and there are many others at your disposal:

- **Pinterest:** Curation for everyone. This easy to use, extremely visual program integrates into browsers, with many sites embedding the capability to curate directly from their pages. It doesn’t encourage analysis; the site comes off as mostly for fun and less for serious content.
- **SharePoint:** Can be the fastest way to get started inside an organization. Without additional design and coding by users, the program isn’t as visually engaging as some, but as a standard organizational tool it can be adopted easily.
- **Scoop.it:** Acts much like Pinterest but tends to have more of a business focus. Users can add a tool to their browsers, making it easy to curate. Scoop.it encourages a longer analysis of the article or item being “scooped.”
- **Curatr:** Merges curation with formal, collaborative learning. Users can preset curation of an entire massive open online course (MOOC) or formal learning program. It also incorporates gamification elements to encourage participation and engagement.
- **Evernote:** A good tool to use for both personal and public curation. Users can curate resources for their own use and determine which to make public.

- Flipboard: Create a digital magazine. Flipboard’s magazine-style format allows users to “flip” through social media and website content as they discover, collect, and share news and information from a variety of sources.
- Paper.li: Another tool for curating and aggregating, Paper.li allows users to publish a “newspaper” of the articles and resources they find.
- Pearltrees: Expands on visual curation tools such as Flipboard, Pinterest, and Scoop.it by including drag-and-drop functionality that allows users to gather and move objects easily.

Good curation can take time. To succeed within the organization or group, the platform must be easy to use for both curators and learners. Take the time to look over this list and evaluate tools to determine which will work best for your situation.

Summary

There are a multitude of reasons for curating, many of which are discussed throughout this book. Some are not covered here, and you’ll probably discover a few more as you go along. With each endeavor take the time to create a solid, documented strategy. Think through your purpose, the process you’ll use, who will participate in the curation, and what tools they’ll use. These simple steps will set you up for successful curation.

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