



Linked Conservation Data

LCD Strategy Working Group

Data policy primer and template

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Data policy primer

Introduction

The use of data which is suitable for querying and analysis benefits many domains of practice and research. In conservation such data is not widely available. This policy primer and policy template assist with planning for organisations to make such data widely available. This policy primer and template is not intended to be restrictive or to set out a single set of required actions; instead it should be used to agree on an aspirational path for the future which aligns with the strategy and priorities of the organisation.

Linked Conservation Data

Linked Conservation Data (LCD) is a network of partners exploring best practices and tools for making conservation documentation records accessible. This includes the use of technologies collectively referred to as Linked Data. Linked Data allows the integration of records across different organisations. This integration allows answering questions which are currently impossible to answer by querying individual datasets. They range from current trends on treatments, to decision-making for environmental control, to long-term departmental planning.

What is a Data Policy for conservation?

It is a document outlining objectives for handling data produced during conservation work. The spirit of the document is to explain how an organisation undertaking conservation work can distribute the resulting conservation records for reuse by relevant audiences. The data policy explains the principles, organisational steps and roles to achieve this.

What is this Data Policy template?

It is a document template which assists policy makers in producing a Data Policy document for conservation in their organisation. The policy template outlines areas for consideration when producing the policy. It also recommends the adoption of best practices as discussed in the LCD consortium.

The role of professional bodies

The International Institute for Conservation of Historic and Artistic Works (IIC), the Institute of Conservation (Icon) in the UK and the American Institute of Conservation (US) have contributed to the development of this document and support its aim for guiding organisations towards open and good quality documentation records.

Challenges and Opportunities

Best practices

With the increasing variety of the quality of data which is shared online, it is appropriate that discussions around best practices take place within organisations and the profession.

Open data

Progression of practice and thinking in the domain of conservation is augmented by sharing conservation data openly. This means sharing without licensing restrictions for use and reuse of data. This is not widely observed in conservation and this document champions sharing data openly while respecting confidentiality and copyright. This policy template allows excluding datasets when sensitive material is documented or where permission for sharing has not been granted.

Commitment to documentation

Sharing good quality conservation data requires for data to be produced during conservation work. The additional effort of producing rich data is balanced by the benefit of consuming data produced by others and by informing decisions for our own conservation work based on previous observations.

Technical tools

Sharing conservation data requires technical infrastructure. Organisations may be in different stages of establishing such infrastructure. Good practices for documentation are essential prior to that infrastructure being in place. This will enable its gradual delivery and ensure that it is fit for purpose. Organisations which lack the resources for implementing such infrastructure could seek partnerships with larger organisations for hosting their datasets thus forming a network of support for sharing conservation data.

How to use the template?

The template should be customised by removing and adding points in the various sections. The “Principles” section is critical in describing the nature of the shared data and the idea of openness should be preserved where possible. The template can also be used “as is” when replacing the token words between “<” and “>” and considering the optional sentences between “[“ and “]”.

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Data policy template

| | |
|-----------------------------------|--|
| Policy number | |
| Summary | |
| Who this policy applies to | |
| Author/policy contact | |
| Approved by/approval level | |
| Date effective | |
| Last reviewed or updated | |
| Frequency of review | |

1. Introduction

This data policy specifies how conservation records should be produced and published by the <organisation>.

The core objective of this policy is to set a time-frame for producing and publishing conservation data and inform planning.

The policy applies to the <conservation department> of the <organisation>. The staff of the <conservation department> are responsible for implementing the policy.

The <conservation department> will plan the publication of conservation data [in collaboration with <other departments>] [of <other organisations>] and create new or adapt current workflows to produce and consume conservation data.

2. Definitions

Data production: the creation of records following observations made during conservation work. These records should be in a suitable format, such as a database, which enables automatic transformation using software tools.

Linked Data: Sharing data online following recommended guidelines by the World Wide Web Consortium for the Semantic Web including the use of the Resource Description Framework.

Open data: Data that can be used without licensing restrictions.

External authorities: controlled vocabularies and lists of records which are broadly accepted as accurate and can be used as reference points (e.g. the Getty Arts & Architecture Thesaurus)

Two ISO standards are particularly relevant to this policy:

- ISO 25964 on the interoperability of thesauri (<https://www.niso.org/schemas/iso25964>)
- ISO 21127 on ontological modelling of cultural heritage data (<https://www.iso.org/standard/57832.html>) which is also known as the CIDOC-CRM.

The technologies described as Linked Data (<https://www.w3.org/standards/semanticweb/data>) and the relevant initiatives and recommendations of the World Wide Web Consortium are core to the implementation of this policy.

Further definitions and introductory material can be found as Frequently Asked Questions on the Linked Conservation Data project website: <https://www.ligatus.org.uk/lcd/faqs> .

3. Context

The <organisation> is committed to offering high quality data to its audiences through the <organisation's> website.

This policy is needed to:

- a) maximise the value of conservation data for the <organisation> and its audiences, i.e. ensure that small changes in practice have large impact in data quality
- b) articulate the kind of access to conservation data that the <organisation's> audiences should expect to have
- c) set a timeline for offering such access
- d) plan infrastructure and training to enable such access

This policy depends on:

- a) Technical tools: The production, management and publication of conservation records depends on the availability of appropriate technical tools. The <conservation department> will work closely with the <technical department> to provision for such tools.
- b) Culture and training: The production of good quality conservation records depends on good practice on behalf of the <conservation department> staff members. The <conservation department> will provide training courses on the value of Open Data and the use of best practices in producing data.

Following an internal review of requirements and an assessment of the resources needed, we concluded that [the <organisation> has internal capacity to implement tools for sharing conservation data within the next decade.] [the <organisation> does not have internal capacity to implement tools for sharing conservation data. Therefore we are partnering with <other organisation> which can act as a host of our conservation datasets.]

The <organisation> is committed to offering training to conservation staff on best practices for sharing conservation data and disseminating [through <the organisation's social media accounts>] the availability of conservation data as public and open datasets.

4. Principles

This policy should be fully implemented by <2030> for newly produced records [and legacy data]. By that time conservation documentation in the <organisation> will be produced and published according to the following principles:

- Conservation data should be published using the <CC0 or CC-BY> license. This

means that there are <no restrictions> to the use of this data.

- Conservation data will be assessed taking into account legal, ethical and security considerations prior to publication and sensitive data should not be included. The <organisation> cannot publish data for which it does not hold copyright or license or permission to publish. [This may include reasons of:
 - ownership, when conservation work was undertaken by external parties to the <organisation> or when all data produced by conservation work is restricted by agreements with external parties
 - cultural ownership, when permission for sharing material is required from groups such as communities, nations and users
- Conservation data should be published at the latest <5 years> after its production, thus allowing the producer of the data to publish work based on this data first.
- Conservation data should include attribution to the agent (staff member or team) who produced it and the date of publication. This means that the provenance of the data is published alongside it.
- Conservation data should be published using open formats on the <organization's or partner organization or consortium> website and/or institutional repository. When this is not practically feasible (e.g. when there are no open formats available or an institution is committed to other formats), then metadata should be published using an open format[<and, or> data in a proprietary format should be made available].
- Where possible conservation data should point to external authority files to disambiguate records. This should include:
 - the publication of local vocabularies used in <the organisation> alongside their matching synonyms from external authority files where available,
 - the mapping of local database schemas to the CIDOC-CRM ontology and its extensions.

Datasets to be published and revised on a regular basis include:

- [data about the technology and condition of collection items]
- [data about past treatments alongside assessments of success]
- [data about proposals for new treatments]
- [data about environmental monitoring of relevant spaces]
- [data about scientific analysis or other technical work]
- [metadata that indicates treatment and/or analysis has occurred in lieu of full data from the treatment]
- [etc.]

[Success for the implementation of this policy will be assessed based on the following metrics:

- [number of projects sharing datasets,]
- [scale of legacy conservation records being shared,]
- [percentage of staff members able to share data,]
- etc.]

5. Organisational approach

By adopting this policy the <organisation> will:

- contribute to the ongoing research in the conservation profession and inform conservation work in the <organisation>
- champion transparency in safe-keeping and conservation work in <the organisation's> collections
- engage with audiences by delivering rich conservation data

This policy forms part of and aligns with the <organisation>'s wider strategy for:

- pioneering in the digital realm by sharing collection information online
- enabling engagement of new audiences with rich content
- support the development of collections through expert staff knowledge
- promote the history and culture of the <region>

6. Related policies, procedures, processes, forms, guidelines and other resources

This policy forms part of a broader collection of policies by the <organisation> which support our mission for greater use of our collections and broader engagement with our audiences, which include:

- <related policies of the organisation>.

In implementing this policy we are consulting with a number of external partners and resources, including:

- [the Linked Conservation Data Network with its a) terminology guidelines, b) data modelling recommendations and c) training material,]
- [the SPECTRUM standard,]
- [the ResearchSpace and Sinopia platforms for Linked Data,]
- [the Linked Art Network with its software tools,]
- [the CIDOC-CRM special interest group,]
- [the Open Data Institute guidelines on Open Data policies,]
- etc.

7. Roles and responsibilities

This policy specifies that members of the <conservation department> should be producing and publishing data according to the principles outlined in section 4. They will be led by the <conservation documentation lead>. Members of the <digital team> should be responsible for maintaining the infrastructure to allow production and publication of data.

The <head of the conservation department> and the <head of digital> should be responsible for setting plans to implement the policy. In particular the <head of the conservation department> will be responsible for staff training while the <head of digital> will be responsible for establishing the required infrastructure.

The <conservation documentation lead> will be responsible for supporting the published datasets and answering queries by audiences about the datasets. The <conservation documentation lead> will also be responsible for liaising with the relevant communities to maintain best practices and inform this policy revisions.

The policy is formally approved and ratified by the <board of trustees> of the <organisation>.

8. Managing implementation and review

Implementation of this policy is the responsibility of the <head of the conservation department> who may assign this task to other members of staff. Implementation decisions rely on regular review of similar work in other organisations and are based on the experience gained by projects such as the Linked Conservation Data Pilot (<https://www.ligatus.org.uk/lcd>).

This policy is subject to an <annual> review, assessment and revision. The <head of the conservation department> is responsible for undertaking this task in collaboration with the <head of digital> and in consultation with staff members of the <conservation department> and primarily the <conservation documentation lead>. The <head of the conservation department> finalises the revised policy document before ratification by the <board of trustees>.

9. Feedback

This policy has been prepared by <name(s) of policy author(s)> based on a template provided by the Linked Conservation Data Network. This policy has been ratified by the <body which ratified the policy>. The <organisation> welcomes feedback on its policies.