

**NATIONAL ENDOWMENT
FOR THE HUMANITIES**

SAMPLE APPLICATION NARRATIVE



Preservation and Access Grants
Institution: Folger Shakespeare Library

Folger Shakespeare Library
Application to the National Endowment for the Humanities
Preservation and Access: Humanities Collections and Resources

Picturing Shakespeare
Description of the Project and its Significance

Picturing Shakespeare is a two-year project proposed by the Folger Shakespeare Library to create a database of 10,000 high-resolution digital images of prints, drawings, and photographs relating to Shakespeare and Shakespeare's era. The Folger holds the world's largest collection of Shakespeare-related visual resources.

Picturing Shakespeare concentrates on providing access to a large number of well-cataloged high-quality images in a flexible viewing environment rather than on building a fixed interpretive framework around them. We want to make the images available to as wide an audience as possible so that they can use them according to their different needs. Separate portals to the digital images will be tailored to each of three audiences: humanities scholars using images as primary resources in advanced research; teachers using images in the classroom; and general users needing a picture library (e.g. students doing school projects, publishers needing book illustrations, interested members of the general public of all ages browsing the web).

The 10,000 images are all in the public domain, and range in date from the 16th century through 1922. Images from the 16th and 17th century cover a broad range of subjects featured or alluded to in the works of Shakespeare (e.g. portraits, allegories, current events, views). Images from the 18th through early 20th century focus on Shakespeare, actors, and the theater, with particular attention to specific people and places. *Picturing Shakespeare* will offer direct and free public access to this collection for the first time in our history, and the library's mission to preserve and provide access to its unique holdings for future generations will be doubly served by creating and preserving high-quality digital facsimiles while reducing handling of the originals.

Direct access will be through two database systems—Luna Insight, with extensive searching and viewing options, and CONTENTdm, with a streamlined interface and the ability to act as a repository for cross-collection searching. Users will also be able to access each image through a hyperlink in its catalog record. The image database will be accessible at no charge using a web browser. Users will be able to download low-resolution images for research, classroom, or personal use for free, or may follow a link to an online order form to purchase high quality images for reproduction. In addition, users of the advanced features will be able to save search results online as personal "portfolios" of images, e.g. to support particular research projects or academic courses.

Like many smaller institutions, the Folger faces the problem of meeting high demand for searchable digital images when the original material is itself uncataloged or undercataloged in a card environment. *Picturing Shakespeare* provides an innovative combination of simultaneous scanning and MARC cataloging of graphic materials using minimum resources for maximum shared benefit. These records will follow the national data standard established by *Graphic Materials: Rules for Describing Original Items and Historical Collections*. Details of our retrospective conversion and our cataloging instructions, along with our data mappings and crosswalks, will all be made available to other institutions interested in pursuing similar projects.

Picturing Shakespeare will continue to grow as a public access database after the initial grant period, with new images added as they are created for other projects (e.g. the Folger website, exhibitions, and print publications). It will become an integral part of reference services, seminars, and teacher workshops.

Folger Shakespeare Library
Application to the National Endowment for the Humanities
Preservation and Access: Humanities Collections and Resources

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Folger Shakespeare Library
Application to the National Endowment for the Humanities
Preservation and Access: Humanities Collections and Resources

Picturing Shakespeare
Narrative

The Folger Shakespeare Library, home to the world's largest Shakespeare collection, is creating a searchable, browseable, and expandable online image database of 10,000 prints, drawings, and photographs relating to Shakespeare and Shakespeare's era—*Picturing Shakespeare*. Because of its unrivalled visual resources on this subject, the Folger is uniquely equipped to implement this two-year project, to be completed in 2010.

Separate portals to the digital images will be tailored to each of three audiences: scholars using images as primary resources in advanced research; teachers using images in the classroom; and general users needing a picture library for various reasons, such as students doing school projects, theater professionals seeking inspiration, publishers needing book illustrations, and interested members of the general public of all ages browsing the web. Products and vendors to be used for content delivery include Luna Imaging's Insight and OCLC/DiMeMa's CONTENTdm. Descriptive metadata associated with the original images will be made available in MARC through the Folger's online catalog and through OCLC WorldCat, with hyperlinks to freely-accessible online facsimiles.

We request a grant of \$350,000 from the National Endowment for the Humanities toward the total project budget of \$771,004.

1) Significance

a) Significance of *Picturing Shakespeare* to Researchers, Educators, and the General Public

Every year the Folger Shakespeare Library receives an average of 2,400 reference questions asked by individuals as diverse as scholars, school children, high-school teachers, novelists, community theater groups, publishers, graphic designers, and picture researchers. The one question that comes from this wide audience in more or less the same form each time begins with "I'm looking for pictures of...." and they want to see the pictures now (see the attached Example Reference Questions document for examples). Unfortunately, this is a request we cannot fulfill, despite having the world's largest collection of Shakespeare-related images. *Picturing Shakespeare* will therefore not only meet a demonstrated on-site research need for image access, but will also make material otherwise not easily accessible to remote users available for research, education, and other uses. For these reasons, we expect increasing exposure of images of Shakespeare's plays and Shakespeare's era to encourage scholarship in the field and generate increased public awareness of the Folger collection.

Picturing Shakespeare concentrates on providing access to a large number of well-cataloged high-quality images in a flexible viewing environment rather than on building a fixed interpretive framework around them. We want to make the images available to as wide an audience as possible so that they can use them according to their different needs. Creation of a digital image database whose resources can be integrated with and can extend the usefulness of existing resources will advance our pedagogical goal of promoting the use of primary source materials in the teaching at all levels of Shakespeare and the culture of early modern Europe.

Users will be able to download low-resolution images for personal, research, or classroom use for free, or may follow a link to the Folger's Photography and Digital Imaging department's online order form to purchase high quality images for reproduction. In addition, users of the advanced features will be able to save search results online as personal "portfolios" of images, e.g. pictures for a lesson plan, or to support particular research projects. Because the database will allow scholars to sort, zoom, group, and compare images in a "workspace" instead of simply providing a visual catalog of our holdings, it will be possible to do advanced research remotely, via the web, using a statistically significant number of images. For example, a scholar interested in changing perceptions of women's power can use Macbeth and Lady Macbeth as a test case and see virtually every depiction of this husband-and-wife relationship over a period of 150 years.

b) The *Picturing Shakespeare* Collection

The Folger Shakespeare Library's collection of prints, drawings, and photographs consists of approximately 50,000 items relating to Shakespeare and Shakespeare's era created in Europe and America. For *Picturing Shakespeare*, 10,000 of these will be cataloged and digitized, ranging in date from the early sixteenth to the early twentieth century, with most dating from the seventeenth through the nineteenth century.

All selected images relate to Shakespeare and Shakespeare's era, with the two largest single subject groups being ca. 550 "portraits" of Shakespeare (showing how he was visualized at different times and in different cultures), ca. 1,600 genre scenes illustrating Shakespeare's works, and a similar number depicting identified actors in Shakespearian roles. The *Picturing Shakespeare* project brings these images together with complementary images of Shakespeare's era: portraits of European leaders, depictions of current events and allegorical scenes, views of contemporary places, etc. Approximately 15% of the images are unique drawings; 5% are photographs; and the remainder comprises engravings, etchings, lithographs, and other non-photographic prints.

Unlike an art museum, where collections are aesthetics-driven and artist-driven, our research library's mission mandates a subject-driven visual materials collection. Our prints and drawings collection focuses exclusively on Shakespeare, Shakespeare's era, and the theater. We have portraits of actors and actresses ranging from the likes of David Garrick, Edwin Booth, and Ellen Terry—still famous today—to character actors who were barely noticed in their own time periods. We have thousands of depictions of

Shakespeare's plays—some representing actual stage performances, others purely imaginary.

We provide images not typically found in other repositories, since the subject matter is not of interest to art museums, and since libraries often exclude visual material.

Humanities and other subject strengths in the Folger's art collection include:

- allegorical imagery (e.g. Ages of Man, Five Senses, Nine Muses)
- architecture
- city views (especially London and places mentioned in Shakespeare)
- costume illustrations
- current events (e.g. festivals, Protestant Reformation, English Civil War, Glorious Revolution, French and Dutch politics)
- daily life (especially trades and occupations, and including visual representations of the "good woman" the "happy husband" and other complements to social conduct literature)
- *Memento mori*
- military
- performances (including masques)
- portraits (especially theatrical)
- technology

Humanities scholars have made, and continue to make, extensive use of these Folger images. *The London Stage, 1660–1800* (Southern Illinois University Press, 1960–1968) drew largely on Folger images and remains a standard reference source. The same can be said of the sixteen-volume *Biographical dictionary of actors, actresses, musicians, dancers, managers & other stage personnel in London, 1660–1800* by Philip H. Highfill, Jr., Kalman A. Burnim, and Edward A. Langhans (Southern Illinois University Press, 1973–1993). Shakespeare-specific stage histories relying heavily on Folger images include Gary Taylor's *Reinventing Shakespeare: A Cultural History* (New York: Weidenfeld & Nicolson, 1989) and Richard Schoch's *Shakespeare's Victorian Stage* (Cambridge University Press, 1998). Folger art images also appear in biographies such as *Fanny Kemble's Civil Wars* by Catherine Clinton (New York, Simon & Schuster, 2000), *Shakespeare: A Life* by Park Honan (Oxford University Press, 1998), and *I'll tell you what: the life of Elizabeth Inchbald* by Annibel Jenkins (University Press of Kentucky, 2003). Not surprisingly, Folger images are also sought for standard editions of Shakespeare such as the Arden, and New Cambridge.

Images from the Folger art collection are also used in humanities scholarship outside the realm of literature and stage history. Recent publications using Folger images include *Tudor church militant* by Diarmaid MacCulloch (London, Allan Lane, 1999), *Historical Dictionary of the Elizabethan World* by John A. Wagner (Phoenix, Oryx Press, 1999), and *Renaissance clothing and the materials of memory* by Ann Rosalind Jones and Peter Stallybrass (Cambridge University Press, 2000).

The *Picturing Shakespeare* collection will also interest art historians. All historic techniques are represented: woodcut, engraving, etching, mezzotint, aquatint,

lithography, photogravure, pencil, watercolor, iron-gall ink, albumen photography, silver-gelatin photography, and more. Art historians whose research has drawn on material targeted for *Picturing Shakespeare* include Carol Solomon Kiefer (Mead Art Museum, Amherst, MA), Heather McPherson (University of Alabama), Alexander Nemerov (Yale), and William L. Pressly (University of Maryland).

Significant early-modern artists known for their illustrations are well represented, and include:

- Hans Vredeman de Vries (1527–ca. 1604)
- Francis Delaram (1589 or 90–1627)
- van de Passe family (16th and 17th c.)
- Renold Elstracke (fl. 1590–1630)
- Abraham Bosse (1602–1676)
- Wenceslaus Hollar (1607–1677)
- William Marshall (fl. 1617–1650)
- Romeyn de Hooghe (1645–1708)

Later artists whose original Shakespeare-related works can be found at the Folger include:

- Francis Hayman (1708–1776)
- George Romney (1734–1802)
- Henry Fuseli (1741–1825)
- William Hamilton (1750 or 1751–1801)
- Robert Smirke (1752–1845)
- Richard Westall (1766–1836)
- John Masey Wright (1777–1866)
- John Cawse (ca.1779–1862)

These names are familiar to specialized art historians, but little known to others in the humanities who seek images for cross-disciplinary research. *Picturing Shakespeare* will allow other humanities scholars to pinpoint the images they need without needing an art historian's knowledge of specific artists' names associated with a subject.

c) Significance of *Picturing Shakespeare* for Existing Resources at the Folger and Peer Institutions

There are existing interpretive frameworks at the Folger that are positioned to make immediate use of the results of *Picturing Shakespeare*. These include the online lesson plans created by the National Endowment for the Humanities-funded *Teaching Shakespeare Institutes* (see <http://www.folger.edu/education>) and the collaborative websites and resources created by the Folger Institute (see <http://www.folger.edu/institute>) with an endowment from the Andrew W. Mellon Foundation and grants from the National Endowment for the Humanities and others. Other existing interpretive frameworks that exemplify the uses envisioned for images discovered through *Picturing Shakespeare* include the MIT Shakespeare Project

(<http://shea.mit.edu/ramparts>) and Shakespeare's World at Emory University (<http://shakespeare.emory.edu>).

Peer and other academic institutions with uniquely specialized holdings have created similar products, e.g. the John Carter Brown Library's "Archive of Early American Images" (http://www.brown.edu/Facilities/John_Carter_Brown_Library/pages/ea_hmpg.html), the American Antiquarian Society's "Farber Gravestone Collection" (<http://www.davidrumsey.com/farber/>), and the collaborative project "British Printed Images to 1700" (<http://www.bpi1700.org.uk/>), led by Birkbeck, University of London. *Picturing Shakespeare* will break new ground, being the first image database covering Shakespearian images through the ages and, as described below under Cataloging Details, a model for smaller special collections seeking to provide art work digitization while simultaneously providing full MARC records for the original items pictured.

Other Shakespeare image resources exist, but are limited in scope. For example, Cleveland State University's "Cleveland Press Shakespeare Photographs 1870–1982" (<http://www.ulib.csuohio.edu/shakespeare/>) only includes images from the photo archive of *The Cleveland Press*. The Shakespeare Birthplace Trust Museums Online Catalogue (<http://www.shakespeare.org.uk/museums/>) only provides images for 72 works on paper (as of a May 20, 2007 search) and these are only large thumbnails. The Furness Image Collection at the University of Pennsylvania (<http://imagesvr.library.upenn.edu/f/furness/>) provides over 2,000 Shakespeare-related images, mostly nineteenth century, but provides neither broad subject access nor MARC records.

In surveying other institutions' online image databases, we found that they generally fall into two categories: catalogs leading to thumbnails that can be viewed in detail singly, or powerful image banks that lead to a "workspace" that allows users to group, zoom, and save sets of images. The former are often integrated into an institution's online catalog with standard descriptive cataloging, while the latter tend to be stand-alone, with metadata that do not follow established rules for data content. *Picturing Shakespeare* will combine the best of both worlds: a multi-functional image bank with standardized descriptive metadata made available in MARC to other institutions for copy cataloging or for importing as digital resources. Descriptions will co-exist in our online catalog and in OCLC WorldCat, where the MARC records will link back to the images.

Finally, *Picturing Shakespeare* integrates with existing resources at the Folger and other institutions in a direct way: MARC catalog records, with embedded links to the images in their native environment, will appear in Hamnet, the Folger's online catalog, and in OCLC WorldCat, the international online union catalog. This will greatly facilitate resource discovery because users will be able to find the material without having to locate and separately search a stand-alone interface. Moreover, we hope to advance scholarship and help reduce graphic materials cataloging backlogs at peer institutions both through the provision of these MARC bibliographic records and authority records, and by sharing our instructions for off-site retrospective conversion and "triage" for on-site record

enhancement. Finally, catalogers at other institutions will be able to download the OCLC WorldCat records to their own online catalogs, adding the images to their own collection as free electronic resources.

d) Significance of *Picturing Shakespeare* for our Preservation and Access Goals

Preservation and access are key parts of the Folger Shakespeare Library's mission, which is to "preserve and enhance its collections; to render the collections, in appropriate formats, accessible to scholars; and to advance understanding and appreciation of Shakespeare's writings and of the culture of early modern Europe more generally through various programs designed for all students and for the general public."

Many who would benefit from the Folger's collection have little or no chance of handling the original material due to lack of access to our Reading Rooms or lack of time to spend conducting picture research in person. *Picturing Shakespeare* will offer direct and free public access to this collection for the first time in our history. Off-site searchers will be able to locate and browse images themselves instead of describing what they need to staff. On-site readers will be able to move quickly through hundreds of images instead of having to wait for staff to bring originals from the vault. The library's mission to preserve and provide access to its unique holdings for future generations will be doubly served by creating and preserving high-quality digital facsimiles while reducing handling of the originals.

Preservation and access to the collection are vital—but sometimes conflicting—parts of the Folger Shakespeare Library's commitment to our diverse user communities. All *Picturing Shakespeare* materials are currently in good condition, but they will not remain that way if leafing through the physical items remains the only way to find images. *Picturing Shakespeare* will preserve the collection by archiving digital surrogates of each image and by reducing the need to handle the original materials.

Currently, most prints, drawings, and photographs at the Folger are described in an outdated, incomplete, and sometimes inaccurate card catalog available on-site or as a G.K. Hall printed catalog (four volumes of photo-reduced images of the cards). Subject access is generally limited only to the specific person, place, or play depicted. It is not possible to search for broad subjects or genres in the way users now expect. For example, someone looking for representations of masculinity on the nineteenth-century stage would have to look up each of several dozen actors' names because "actors" is not a subject heading. Similarly, researching theater architecture involves first looking under the name of a city (be it Boston, New York, London, or Bucharest) because there is no generic heading for theaters.

These pictures have not yet been cataloged electronically or digitized. They are only accessible on-site, to advanced scholars, who must call them up individually from the vault. Finding pictures requires searching a card catalog or, in the case of uncataloged items, searching bare-bones accession-level records. There has been no visual materials cataloging since 1984, although material has continued to be acquired. Prints, drawings, and photographs acquired during the past quarter century are described only by accession

records: paper slips filed by artist or title (but not both) until 1997, and online artist-title-date records from 1997 to the present. No subject access is provided for accession-level records.

These current limitations on access to this material will no longer apply after the project. Through new cataloging and retrospective conversion combined with record enhancement, *Picturing Shakespeare* will raise the level of intellectual description to national standards, with particular attention paid to authorized name, subject, and genre headings.

2) History, Scope, and Duration

a) Origin of *Picturing Shakespeare*

The seeds of this project were sown in 2000, when the Folger Shakespeare Library created a Curator of Art position to complement the existing Curator of Books and Curator of Manuscripts positions. The library's founding collection, built in the late nineteenth and early twentieth century by Henry Clay Folger and Emily Jordan Folger, encompasses a wide range of media including many of the 10,000 prints, drawings, and photographs targeted for *Picturing Shakespeare*. After the Folgers' deaths in the 1930s, the institution concentrated on developing and providing access to the book and manuscript collections while the scholarly value of the visual materials at the Folger was little recognized. As cross-disciplinary research and interest in non-verbal evidence grew in the 1980s and 1990s, the Folger has come to recognize the richness of our hidden resources. Simultaneously, the decreasing cost of color printing and the explosion of digital image use in the classroom and on websites has created demand for images from increasingly diverse user communities.

b) Groundwork For *Picturing Shakespeare*

The groundwork for digital imaging and non-book cataloging at the Folger has been established through specific recent policy deliberations, and has been tested both through ongoing experience in digitizing and the buildup of digital infrastructure, and through projects which make use of techniques and workflows relevant to this current proposal.

Institutional Commitment: *Picturing Shakespeare* has strong support from our Director and Board of Governors as a project in keeping with new efforts by the institution to reach out to new users in innovative ways. In 2005, our mission statement was changed by a Board-led effort to include making the collection more widely accessible "in appropriate formats," e.g. high-quality digital images.

In 2006, the Director established a Digital Futures Committee (DFC), composed of representatives from each of the five Folger divisions and co-chaired by the Head of Information Services and Head of Collection Information Services. Among other efforts, that committee spent two days in July 2006 in meetings facilitated by Expert Choice, Inc. These meetings were devoted to developing and ranking ideas for technology projects that further the Folger mission. Collection digitization ranked first among participants as the project that best met objectives derived from our mission. There is now clear

recognition across the institution that collection digitization will help further the work of each of the five Folger divisions. Also in 2006, curators and senior staff from the Central Library division met to revise and update a 1998 policy document on digitization, *Digital Images at the Folger Library: Issues and Recommendations*. Included in this document are updated “Criteria for Selecting Digital Projects” used for evaluating and developing proposals. *Picturing Shakespeare* meets these criteria (see attachment Central Library Digital Priorities).

Digitizing Experience and IT Infrastructure: The Department of Photography and Digital Imaging has been working with digital images for over ten years. In 1996, the department created a custom database to track digital images and metadata. In 2002, the Photography Department was renamed to include “Digital Imaging” in recognition of its expanded scope of services. In 2003, a 440 GB MSSQL server was installed to implement the Luna Insight digital management system in-house and provide dedicated storage for digital images. In 2004, the Folger website underwent a complete redesign. The department worked closely with web designers and staff across the institution to devise an image database within the website that incorporates website image requests and delivery options along with captioning, tracking, and image search capabilities. Thus far over 10,000 images have been produced and delivered to the website (each of the 2,000+ images in five sizes).

In 2005, the Department closed while undergoing extensive construction and renovation to remove traditional film and print darkrooms and create a new office designed specifically for the creation and management of digital images. This includes a color neutral environment, ergonomic imaging work stations with high speed connections to the image server, 5500°K (daylight balanced) adjustable lighting, and a temperature and humidity controlled lockup for temporary storage of rare materials. New workflows were established and tested to accommodate an exclusively digital environment. Image capture equipment was upgraded to include a large format film scanner, additional oversized flatbed scanner, and direct capture medium format workstation. Jim Rich, a color management consultant who is also consulting on *Picturing Shakespeare*, was hired for a three-day on-site intensive training course on color management and equipment profiling. Luna Insight image management software was purchased, custom designed, and implemented, with staff training held in September 2005. In early 2006, the department reopened as an exclusively digital image provider.

The Department of Photography and Digital Imaging currently has over 18,000 digital images on file, including un-retouched masters and corrected and cropped first derivatives, and has produced over 28,000 digital images total. Over 5,000 images are available to staff via a database using the Luna Insight platform, and 2,000 images are viewable on the Folger website.

To support existing and planned projects our hardware, network, and backup capacity has been increased, stabilized and rendered scalable. With digitization identified as a priority, in the summer of 2006 the institution invested in a major upgrade to its information network with a purchase of a scalable, tiered, Compellent Technologies’ Storage Area

Network (SAN). This increased the storage on the system to a scalable six terabytes, with a three terabyte off-site snapshot backup server. In 2006 we replaced our six-year-old Voyager server with a new Sun Microsystems V240. This equipment is newly installed in a remodeled server room served by a dedicated HVAC system. Also budgeted in 2007-2008 is increased bandwidth to accommodate the electronic delivery of images to local desktops, remote users and the off-site OCLC-based web server specified in this grant.

Along with the above-described infrastructure, additional projects prepared us for the work of *Picturing Shakespeare*, include the ongoing *Shakespeare Quartos Digitization Project*, and the retrospective conversion of catalog card records for art, manuscripts, and rare books from the Folger's David Garrick collections, both described below.

Shakespeare Quartos Digitization Project: The goal of the *Quartos Project* (begun in 2006) is to digitize and publicly display the Folger Shakespeare Library's entire short-title catalog (STC) collection of Shakespeare quartos through 1640, including 152 plays, 27 copies of poetry and the sonnets, and 36 copies of Shakespeare apocrypha, for a total of 215 items. The file will be searchable online and available in a variety of resolutions for research or publication. The Folger project follows similar work completed at the British Library, Oxford, and the National Library of Scotland, and precedes work at the Huntington. The expectation of this multi-institutional collaborative effort is to create international access to holdings from the five leading repositories of Shakespeare's quartos. As of July 2007, 50 of our pre-1640 Shakespeare plays in quarto format have been fully digitized and mounted in Luna Insight where they are currently accessible to Folger staff.

Garrick Retrospective Conversion Project: A grant from 2000 to 2002 from the Gladys Kriebel Delmas Foundation enabled a retrospective conversion (recon) project of print, manuscript, and art items related to the eighteenth-century actor David Garrick. This resulted in the creation of 551 MARC records for art, and ca. 1,850 MARC records describing Garrick-related manuscript items and collections. A subsequent grant from the Delmas Foundation from 2003 to 2004 allowed us to update and convert two additional typescript finding aids into online EAD finding aids (Manuscripts in the Henderson Collection; Stratford and Warwickshire references in Folger Manuscripts), continue work on cataloging a third finding aid (the Tamworth Collection), and send out for retrospective conversion (our vendor was Electronic Scriptorium) ca. 4,300 primarily collection-level records for unbound manuscripts. We encountered necessary delays in providing online access to all MARC recon from these projects when proofing and verification requirements proved more onerous than expected due to outsourcing to non-professional catalogers and the lack of art and manuscript catalogers at the Folger. These experiences with outsourcing of manuscript and art recon inform our approach in this current proposal, which combines both card recon and in-house catalogers working under curatorial supervision and in consultation with the Cataloging Department.

c) Scope of *Picturing Shakespeare*

The 10,000 items for *Picturing Shakespeare* were selected from the approximately 50,000 prints, drawings, and photographs in the collection because they provide a rich

data set for humanities scholarship (i.e. fully representative of the range of subject matter, artistic styles, historic periods, etc.), they are all in the public domain, and their single-sheet format allows retrospective conversion, cataloging, and digital imaging to proceed more quickly (e.g. no need for collations or binding descriptions in cataloging; no need for constant cradle or focal-length adjustments during photography). The project has been evaluated and approved by representatives of our core constituencies—scholars, teachers, librarians, editors, and interested members of the public—either through direct participation in planning meetings, or through consultation on and/or approval of this document.

d) Duration and Sustainability of *Picturing Shakespeare*

Retrospective conversion of card catalog records is currently underway and is expected to be complete before May 2008. Our selection of items for digitization will be complete before the grant period, as well. As outlined in the Work Plan Timeline (see below, Section 4), this request is for a two-year project to provide for simultaneous digitizing, catalog record enhancement, and original cataloging as required.

Sustainability and growth of *Picturing Shakespeare* beyond the two-year duration of the project will be ensured by including new images as they are created for other Folger projects (e.g. the institutional website, exhibitions, print publications) and for outside clients. It will become an integral part of our reference services, seminars, and teacher workshops. Future enhancements may include making the Luna Insight scholarly portal available to any interested off-site user, adding the two hundred oil paintings in the collection, and building subject-specific “Pathfinder Packs” of select images with commentary as an electronic version of the Folger’s twentieth-century study folders of prints and slide sets.

The institution is committed to long-term viability and sustainability of electronic and digital resources. We have recently increased our budget for bandwidth capacity in order to be quickly able to deliver images in the web environment. Seven technology-related endowments currently provide ca. \$94,000 annually. Financial sustainability of the project beyond the grant period will be secured through Folger operating and endowed funds dedicated to digital resources and IT infrastructure.

Plans for *Picturing Shakespeare* have been greeted with enthusiasm, and significant funding has already been secured. This includes a \$50,000 gift from a member of the Folger’s Board of Governors, a \$30,000 grant from the Rauch Family Foundation, and an allocation from the Warnock Photography Fund (a quasi endowment which will be used to cover pre-grant equipment purchases). Folger operating funds will cover the salaries and benefits of permanent staff, additional temporary staff, and a portion of the project’s indirect costs. NEH funds would play a critical role in fulfilling the project.

3) Methodology and Standards

a) Preparation and Processing of Material

After completion of retrospective conversion (described in the next section), digital imaging and cataloging will proceed simultaneously, but separately. We will use an Excel spreadsheet of 10,000 pre-selected shelfmarks with auto-generated unique image file numbers as match-points between the digital images and the cataloging in order to bring them together in monthly batches.

In preparation, we have transcribed a master document listing ca. 13,000 shelfmarks for single-sheet prints, drawings, and photographs. In the months leading up to the start of the grant period, the Curator of Art and Special Collections will check these entries against the items and re-order the list by size range and shelfmark. While verifying and sorting the shelfmarks, she will flag which items are in the public domain and select the best representative out of groups of near-identical images. This will result in a completed list of 10,000 items for *Picturing Shakespeare* ready in advance and arranged in the order they should be signed out to the Photography and Digital Imaging Department.

The Head of Photography and Digital Imaging will upload the spreadsheet of shelfmarks to the department's internal FileMaker Pro database, creating unique image filenames. The Project Photographer will sign items out from the vault, digitally capture the master image (with targets), input copyright statement, contact information, and shelfmark for IPTC headers into the image file, and create a first derivative image. Once a week, the Head of Photography and Digital Imaging will check first derivative image quality and IPTC image metadata, generate XML data from the FileMaker Pro database, and upload the files to Insight and CONTENTdm. Master images and first derivatives are TIFF files; additional derivatives created by Insight are JPEG 2000 files. This workflow has proven effective, having been implemented in September 2005, with 6,378 digital photographs made and uploaded to Insight as of July 2007.

Normally, we include conservation assessment and treatment in any project that involves handling collection items. However, in this case conservation needs were met during previous projects. All single-sheet drawings and high-value prints were conserved, encapsulated in polyester, and housed in solander boxes in the 1980s. Most of the remaining single-sheet prints, all unbound photographs, and all unbound prints, drawings, and photographs acquired after 1984 were rehoused in custom mylar-and-cardstock folders made possible by a Getty Foundation grant from 2002 to 2005. Smaller prints acquired prior to 1984 are grouped into acid-free vertical file folders. These prints are the most vulnerable to damage while browsing, as they are loose in the folders. All materials are housed in baked-enamel shelving units in a temperature- and humidity-controlled two-room vault with a gaseous fire suppression system. Note that because polyester film creates interference patterns in digital images, encapsulated items for *Picturing Shakespeare* will be routed through our Conservation Lab for de-encapsulation before photography, then for re-encapsulation in new polyester afterwards.

b) Cataloging Details

While the original works are being photographed, cataloging will proceed in two overlapping phases. First, off-site retrospective conversion will convert catalog cards to MARC21, including revisions to meet current cataloging standards according to detailed instructions. This work is currently underway. Second, on-site enhancement of returned retrospective conversion records and existing accession-level records will occur according to a set of Curator-assigned enhancement levels.

The detailed retrospective conversion instructions (see attached Retrospective Conversion Instructions) are an improved version of instructions tested during a project funded by the Gladys Krieble Delmas Foundation from 2000–2002. The project included retrospective conversion of all cards for prints and drawings relating to 18th-century actor/manager David Garrick, and created a total of 551 bibliographic records. It taught us much about the pitfalls and promise of graphic material retrospective conversion, and at first made us consider original cataloging alone for *Picturing Shakespeare*. Prohibitive time and cost estimates make that unfeasible, so instead, we have re-worked our retrospective conversion instructions and developed a plan for on-site enhancement of recon records. The revised instructions and a sample batch of twenty-two cards was sent to three additional vendors for pricing estimates and sample output. Prices ranged from \$4.00 to \$9.45 per record but did not reflect differences in quality of work.

In the end, we selected Special Libraries Cataloguing (SLC) as our vendor because they showed the best understanding of how MARC records work, and of the kinds of access points and information that special collections materials need. Work started in April of 2007 and they have begun returning records to us in monthly batches. Pending enhancement, the Head of Collection Information Services will begin uploading these records into Hamnet, our integrated library system running Ex Libris Group's Voyager software, where they will be publicly viewable. Fully enhanced records will be batch-loaded to OCLC.

Record enhancement by the grant cataloger will be at one of five levels, depending on the item's subject matter (see attachment Cataloging Timing and Enhancements), recognizing that in an ideal world we would want every record to match the level of detail found in a *catalogue raisonné*. But that is neither practical nor appropriate here. The multi-format nature and cross-disciplinary research potential of Folger Shakespeare Library collections make it preferable to put out a large volume of subject-oriented images from a wide time-span, with enhanced iconographic access only for those from the early modern era.

Enhanced records will be finalized weekly by the Curator of Art and Special Collections, reviewing accuracy, completeness of the data, and MARC encoding. Enhancement and review will either be done with our local Voyager system's cataloging module and uploaded to OCLC WorldCat, or with OCLC's Connexion client and downloaded to our Voyager system. A final decision will be made before August of 2007 when the RLG Union Catalog is absorbed into OCLC WorldCat. By the time cataloging work begins for

Picturing Shakespeare, our workflow changes due to membership in the new RLG Programs division of OCLC will be well-established.

We will use *Graphic Materials: Rules for Describing Original Items and Historical Collections* as our data content standard, the same standard used by the Library of Congress Prints and Photographs division and many other special collections. First published in 1982, *Graphic Materials* has lately been overshadowed by *Cataloging Cultural Objects* (CCO), a new manual for describing cultural works and their visual surrogates. CCO is well-suited to capturing the aesthetic and art historical elements of material, particularly of unique and three-dimensional artifacts, but *Picturing Shakespeare*'s strengths for humanities research lie outside this artistic realm. We have elected to use *Graphic Materials* because the items are all single-sheet images of interest for their subject matter and relationship to literature, and because *Graphic Materials* has a long track record of describing published prints, and of providing metadata in a form familiar to library users. The use of *Graphic Materials* will therefore better facilitate the kind of cross-format source material research that has become common in advanced humanities scholarship. A "triaged" approach will be employed to determine the appropriate depth of source material cataloging, following recommendations of the 2003 Association of Research Libraries Task Force on Special Collections report "Hidden Collections, Scholarly Barriers," and of presenters at the 2006 Research Libraries Group member forum, "More, Better, Faster, Cheaper: The Economics of Descriptive Practice."

Because no other institution has the concentration of Shakespeare-related art that we do, *Picturing Shakespeare* will establish hundreds of new subject and name headings in the National Authority File. Before the start of the grant period, we have already prepared a list of over eight hundred dramatic characters, with cross-references, ready for proposal to SACO, the subject authority component of the Program for Cooperative Cataloging. Because the Folger is a participant in NACO, the name authority component of the Program for Cooperative Cataloging, we also will be contributing new name headings for people depicted and for artists as they come up. We have already done this on a smaller scale during the Gladys Krieble Delmas Foundation-funded Garrick project between 2000 and 2002, which provided approximately two hundred artists and actors for contribution to the National Authority File.

See attached sample of an etching, a card catalog record, and a MARC version of the same catalog record.

c) Organization of and Access to Content

Early in the project, a contracted professional writer experienced with the Folger and its varied audiences, Esther Ferington, will write and design three different "portals" to the content for the Folger website, each aimed at a different constituency: scholars using images as primary resources in advanced research, teachers using images in the classroom, and general users (including students) needing a picture library. The data itself will be the same regardless of point of access, but the portals will permit users to approach the collection with an understanding of what is in it for them in particular, and through interfaces and tool-sets tailored to their needs. By commissioning these audience-

specific points-of-entry early in the project, we will have ample time to test and re-work them in-house before going public.

Because need for these images exists across a wide variety of user communities, and because our current image database is protected by a firewall, user access to these images will rely on two products: Luna Insight (hosted onsite and designed with a sophisticated toolset for the advanced researcher) and CONTENTdm (hosted offsite by OCLC with a streamlined interface for teachers, students, and the general public). Images and descriptive metadata will be managed and presented with Insight Java Client, Browser Insight, and CONTENTdm. CONTENTdm will also act as an OAI-PMH repository (Open Archives Initiative Protocol for Metadata Harvesting). The underlying data (digital objects and metadata) will remain independent of these front-end products, ensuring the longevity of *Picturing Shakespeare*'s functionality in accordance with *A Framework of Guidance for Building Good Digital Collections* (NISO 2004).

Finalized MARC records will reside in the Folger online catalog, Hamnet, as well as in OCLC WorldCat. These records will be converted on a monthly basis by the Head of Collection Information Services to XML for uploading to Luna Insight, and to tab-delimited format for loading to CONTENTdm. Using the unique image number as a match point, the MARC records will populate the descriptive metadata fields for the images. The Folger has used Luna Insight as an in-house image management tool since September of 2005 and, working closely with Luna staff, we pioneered populating an Insight database with exported MARC records as the source for descriptive metadata. In November of 2006, the Head of Collection Information Services evaluated and successfully tested CONTENTdm during a trial subscription, verifying the data crosswalk and testing workflow and upload procedures.

The Folger Shakespeare Library is an established client of Luna, currently offering staff access via the Luna Insight Java Client to a growing collection of digital images. Our Insight database is not yet available to the public. As part of *Picturing Shakespeare*, we plan to begin extending access for on-site Readers (and on an as-needed basis for off-site Readers with static IP addresses) to the full feature set of Luna Insight's Java Client, including scaling and zoom tools that will permit accurate relative comparison of multiple images simultaneously. Testing of unlimited off-site access to this scholarly tool is planned to begin in Year Two upon implementation of an on-site server dedicated to this database. Transitioning to a dedicated server at the half-way mark allows us to focus our attention on new equipment in phases.

In contrast to our Luna implementation, which is both firewalled and primarily aimed at the scholarly research community, CONTENTdm is a turnkey product openly indexed by search engines and widely used by universities, libraries, and museums to deliver browseable image collections through an intuitive and customizable web-based search interface. Our on-site staff and scholarly community will be well served by accessing *Picturing Shakespeare* using the sophisticated toolsets available in Luna's Java Insight client, while the added network security of off-site hosting, the ease of integration with the web of OCLC's existing research tools, and the ability for CONTENTdm to act as an

OAI-PMH repository for cross-collection searching make CONTENTdm a good choice to meet our goal of delivering this image collection to a broader user population than we currently serve.

Users of CONTENTdm and Luna's Browser Insight will be able to view and save screen-resolution images of all material at no charge. Users of Luna's Java Insight will be able to view high resolution images and save high resolution details of all material at no charge. Users of the Folger OPAC and OCLC WorldCat will be able to follow embedded hyperlinks to the images in Browser Insight. The Folger's usual sliding-scale fee will apply to all requests for high resolution images and for publishing high resolution images (see <http://www.folger.edu/template.cfm?cid=1067> for current price lists).

Because *Picturing Shakespeare* will make it possible to search and browse the collection for free from a distance, we anticipate an increase in requests for high resolution images and permission to publish for commercial and non-commercial publication. A benefit of the planned CONTENTdm portal is its proven integration into a hosted "electronic shopping cart" service.

d) Data Storage, Maintenance, And Protection

The Folger has experience in creating, maintaining, and providing access to electronic files of a variety of formats including MARC records and digital images. Core staff are familiar with and committed to conformity with OAIS and "Trusted Digital Repositories: Attributes and Responsibilities" (RLG and OCLC 2002). As described above (Section 2), Folger staff members have been engaged in creating, storing, and migrating digital images of collection materials since 1997.

MARC records are maintained in our online catalog, Hamnet, a Voyager-based installation (Ex Libris Group). It has been online since 1996 and is housed on a local server and backed up nightly. Remote public access to the online catalog via the web is provided through an agreement with the Washington Research Library Consortium, which remotely hosts the cgi scripts and web server that connect remote users seamlessly with our firewalled Voyager server. Our bibliographic records are currently contributed to the Union Catalog of the Research Libraries Group. We plan to contribute bibliographic and authority records to OCLC WorldCat starting in August 2007, when it absorbs the RLG Union Catalog. Records generated by the *Picturing Shakespeare* project, all with embedded image hotlinks, will be contributed to OCLC WorldCat. Further, MARC data for *Picturing Shakespeare* content will be converted to XML prior to load into Insight, and to tab-delimited format prior to load into CONTENTdm.

Picturing Shakespeare files, along with their embedded administrative metadata, will be stored in the Tagged Image File Format (TIFF), which is widely adopted, transparent to a variety of tools, and documented through standard IPTC and Exif metadata. Images delivered locally to staff and scholars will be in Luna Insight-generated JPEG 2000 derivatives, served up with descriptive metadata through an MSSQL-based database. Master digital images and archival first derivatives will be stored online in a SAN and backed up nightly to an off-site server, in uncompressed TIFF format.

Per institutional policy, files are migrated to new equipment as part of ongoing maintenance. Institutional policies and procedures regarding digital access and preservation are reviewed periodically by our “Digital Futures Committee.”

Images and metadata delivered to remote users will be uploaded to a CONTENTdm installation, hosted for us by OCLC. Sustainability of remote access is enhanced through this approach since the Folger currently does not host openly-web-accessible collections on local servers. Intellectual property protection mechanisms will not be embedded in the digital content, but rather ensured by permitting access only to files of a “fair use” size and resolution. Our planned dependence on the technical, hardware, and software environments of Luna and CONTENTdm is mitigated by our multi-tier backup and archiving strategy for the digital source files. This strategy will ensure the ability to migrate the content to future systems.

4) Management Plan, Personnel, and Work Plan Timeline

Key personnel have been given the opportunity to devote a percentage of their time to *Picturing Shakespeare*, and room is being made for two temporary project staff members.

a) Personnel:

Picturing Shakespeare will be managed directly by Richard Kuhta, Librarian, and Erin Blake, Curator of Art. Richard Kuhta will serve as Project Director, managing the budget and serving as the main point of contact with NEH. Erin Blake will serve as Project Manager, facilitating the ongoing tasks, evaluation, and collaborative decision-making needed to make the project a success. For project design planning and ongoing evaluation, she will keep representatives of core constituencies informed of our progress through monthly e-mail updates, including Jeremy Ehrlich, representing teachers and students; Georgianna Ziegler, representing Folger readers, scholars, and the general public; and Owen Williams, representing scholars and the Folger Institute. In addition, Erin Blake will oversee the work of a project intern, and the grant cataloger, the latter in consultation with Deborah J. Leslie, Head of Cataloging. Julie Ainsworth, Head of Photography and Digital Imaging, will oversee the work of the grant photographer and upload images and data to Insight and CONTENTdm. Jim Kuhn, Head of Collection Information Services, will see to the project’s technical needs in consultation with Mary Bloodworth, Head of Information Services.

Core project team:

Richard Kuhta, Eric Weinmann Librarian, is the project director. Educated at Swarthmore College, The Shakespeare Institute, and Trinity College Dublin, Richard has 27 years professional experience with humanities collections in academic and research libraries. As head of the Folger’s largest division, he regularly manages projects of this scope. Examples include “Retrospective Conversion/Cataloging of the Folger Shakespeare Library’s Wing Collection” funded by the National Endowment for the Humanities, 1996–1998, \$175,000; “Cataloging and Retrospective Conversion, Rare Book Collections” funded by the Andrew W. Mellon Foundation, 1997–2000,

\$600,000; and “Raising the Curtain: David Garrick at the Folger” funded by the Gladys Krieble Delmas Foundation, 2000–2002, \$75,000.

Erin Blake, Curator of Art and Special Collections, is the project manager. Erin holds a Ph.D. in Art History from Stanford University. Her experience in humanities research and education includes published papers, invited lectures, exhibitions, and an annual teaching engagement at Rare Book School at the University of Virginia. Recent project management includes the \$200,000 renovation of the Babette Craven Art Vault (2002–2004) and the \$45,000 art re-housing project funded by the Getty Foundation (2002–2005). She also worked closely with Jim Kuhn and Julie Ainsworth implementing Luna Insight in 2005 and the Folger’s new website, 2003–2004. She studied visual materials cataloging under Helena Zinkham (Head of the Technical Services Section of the Prints and Photographs Division of the Library of Congress) at Rare Book School in 2000, and is familiar with the computer systems *Picturing Shakespeare* will use.

Julie Ainsworth, Head of Photography and Digital Imaging, will supervise the grant photographer and upload images and administrative metadata. She has served as department head and staff photographer since 1981 and has managed the redesign of the department’s workspace and transition to digital services. Recent experience with digital initiatives includes the Quartos Project, 2006 to present, the implementation of Luna Insight in 2005, and all image creation and management for the Folger’s re-designed website, 2003–2004.

Jim Kuhn, Head of Collection Information Services, will be in charge of the project’s technical needs. In addition to an MLS (awarded 1989), Jim earned a Master of Arts in Philosophy (awarded 2002). Co-author with Stephen Aby of *Academic Freedom: A Guide To The Literature* (Greenwood Press, 2000), he has worked in cataloging and technical services in research libraries for over seventeen years. He is system administrator of our integrated library system, and oversaw integration of the on-site implementation of Luna Insight with the Folger online catalog and Photography and Digital Imaging databases. He is also chair of the library’s Digital Futures Committee.

Support team:

Mary Bloodworth, Head of Information Services, will work with Jim Kuhn on the project’s technical needs. As members of the library’s Digital Futures Committee, they will ensure *Picturing Shakespeare*’s sustainability, and integration with other digital initiatives.

Jeremy Ehrlich, Head of Education, will advise on meeting the needs of K–12 teachers and students during evaluation sessions. He also sits on the library’s Digital Futures Committee.

Deborah J. Leslie, Head of Cataloging, will advise on descriptive metadata production. As chair of the Bibliographic Standards Committee of the Rare Books and Manuscripts section of the American Library Association, she is experienced in national and international cataloging issues for special material.

Owen Williams, Program Administrator, Folger Institute, will advise on meeting the needs of scholars and Folger Seminar participants during evaluation sessions. He also sits on the library’s Digital Futures Committee.

Georgianna Ziegler, Head of Reference, will advise on meeting the needs of the full range of patrons she deals with, including scholars, publishers, theater professionals, and the general public, during evaluation sessions.

Consultants:

Jim Rich, Rich & Associates, will consult with the Folger on color management and profiling in the first year of the project. Each image capture device for the project will be profiled to reproduce the color and contrast of the original as accurately as possible using color targets, calibration software, and hardware. Jim Rich is a nationally known consultant to the printing industry specializing in color management from image capture to print publication. He has previously consulted with the Folger to color calibrate digital imaging equipment.

Resumes for all of the above project personnel are included in the appendices.

Project personnel to be named:

Project cataloger will create and upgrade item-level records, link records to digital images, and enhance and revise name headings in the national authority file.
Project photographer will digitally capture master images and create first derivatives.
Project intern (unpaid, for course credit) will assist in data clean-up, including authority file research.

Job descriptions for all personnel to be hired are included in the appendices.

Contractors:

Luna Imaging will provide programming and consultation to build a new on-site collection for *Picturing Shakespeare* based on the Folger's existing catalog template. We have worked with Luna on digital imaging projects since 1998, and in 2005 purchased Insight software to give local access to our growing digital image collection.

Special Libraries Cataloging will convert our paper catalog cards to online bibliographic records.

Esther Ferington, an independent writer and editor, will design and compose three web pages to serve as portals for each of three core audiences. She has provided content for Folger publications, including the website, since 2000.

OCLC's CONTENTdm will provide a user-friendly interface to *Picturing Shakespeare* for our off-site users.

b) Work Plan Timeline:

The Folger is requesting funding to support a two-year project from May 2008 to January 2010. Pre-grant activities related to the project are currently underway, including off-site retrospective conversion to prepare for the needed on-site cataloging and recon record enhancement. Selection and preparation of material to be digitized will also be completed

prior to the beginning of the grant period, which will focus on digital imaging and cataloging.

Retrospective conversion of catalog cards

April 2007 through January 2008

- Currently underway, with batches of 1,000 records to be delivered on a monthly basis.

Selection and preparation of material to be digitized

To be completed by May 2008

- To include finalizing a spreadsheet that includes original item shelfmarks of all 10,000 items to be digitized.

Digital imaging

May 2008 through December 2009

- To include hiring and training of one project photographer
- Weekly uploads to Luna Insight *Picturing Shakespeare* database, and to CONTENTdm *Picturing Shakespeare* site.

Cataloging and recon/accession record enhancement

May 2008 through December 2009

- To include hiring and training of one project cataloger
- Weekly uploads to Luna Insight *Picturing Shakespeare* database, and to CONTENTdm *Picturing Shakespeare* site.

Website portal design

August 2008 through November 2008

- See Section 1 for details on why various types of researchers will have their own portals; and see Section 3.c for details on the types of access to be provided.

Training sessions for staff

March 2009

- To include in-house testing and feedback.

Training session for *Teaching Shakespeare Institute* participants

July 2009

- To enable on-site testing and feedback from an important user community.

Beta version publicly available

July 2009 onwards

- With continual enhancements and additions as work is completed.

Training sessions for on-site readers and Folger Institute participants

July 2009, October 2009, January 2010

- Ongoing, three times per year.

**Public release of final version, with full publicity
January 2010**

5) Dissemination And Evaluation Plans

We will begin roll-out of the project in stages, offering the image database to staff from the beginning on the understanding that the pool of records will be small at first, but will increase in number and quality weekly. This will ensure that a group of experienced users will be able to help out by the time the database is large enough to merit training sessions for staff, readers, seminar participants, and *Teaching Shakespeare Institute* participants. When the project becomes widely available to the public, we will already have the built-in support of staff, scholars, and teachers returning to their home institutions to assist newcomers in using the database.

After in-house testing and feedback, we will make *Picturing Shakespeare* and its potential uses known to the Folger's wide range of constituents through targeted announcements in various media: announcements on Folger web pages tailored to each audience area (Visitors; Students & Families; K-12 Teachers; Scholars; and the Press); notices in our in-house newsletters (*Folger Magazine*, *Docent Dispatch*, *Folger Institute Newsletter*); direct e-mail to scholars through the Folger Institute's mailing list; direct e-mail to teachers through the Folger Education Department's E-newsletter for Educators; direct e-mail to interested members of the general public through the Folger's regular "enews;" rack cards in our house style; postings to academic and library listservs; press releases to national and international publications such as *American Libraries*, *Art Documentation*, and *The Shakespeare Newsletter*; a "shorter notice" in *Shakespeare Quarterly*, the journal of record for Shakespeare studies published by the Folger, and an announcement in *Shakespeare Association of America* newsletter. Submission to search engines, and participation in such hosted portals as Luna's "Collection Sharing Registry" and CONTENTdm's "Customer Collections," will also help disseminate knowledge and use of the collection.

We are also committed to sharing what we will have learned in the process of building *Picturing Shakespeare*. We have not been able to find models for smaller institutions attempting simultaneous scanning and MARC cataloging of previously uncataloged or undercataloged graphic materials. We will use the Folger website, conference presentations, and journal articles to disseminate information about how the project was put together. We will make our instructions and data mappings publicly available so that others can adapt what we develop, and learn from the lessons we will have learned in implementing this project.

Our evaluation plan has three aspects:

1. Monitoring quantity and quality of photography and cataloging output at weekly intervals during the project to ensure standards and time-table for completion are being met.

2. Gathering feedback from users with a “let us know what you think” button leading to an online survey covering why they use the collection and how it could be improved.
3. Determining whether our initial goals of increasing access, encouraging wider use of the material, and reducing handling have been met:
 - a. Website usage statistics will track users’ paths into the database.
 - b. Circulation statistics will indicate change, if any, in the amount originals are handled: we anticipate documenting reduced handling because the collection is not open to the public. This runs contrary to what public institutions have found, where increased awareness of the collection through digitization leads to increased demand to see the originals.
 - c. Permission to publish and image request statistics from the existing PDI database will track any changes in number of image permissions granted and in requests for new photography or high resolution images from existing files. We are particularly interested in this because we have not seen it addressed in other digitization projects, and our team has competing hypotheses: on the one hand, having a critical mass of images easily available could reduce the need to dig further; on the other hand, seeing these images could make people want more. How will *Picturing Shakespeare* affect the rest of the collection?