



# **Digital** Shakespeare

Access Audit



# UNIVERSITY OF BIRMINGHAM

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## Executive summary

### Digital strategy

- There is a need for direction in the formation of strategy for digital activity
- The process of digitisation is often confused with digital in its broadest sense
- Collaboration on digital projects is common and widespread
- There is currently a degree of conservatism in the use of new technologies to facilitate collections access

### Digitisation

- Levels of digital content vary widely across the sample
- Digitisation in smaller organisations is largely ad hoc and driven by user demand rather than being geared towards creating demand
- A considerable amount of digitisation in larger organisations is carried out *en masse* but lessons on how and why this is done may be transferrable to smaller organisations
- Digital content is primarily accessed via multiple online databases
- The visibility of these databases is generally quite poor

### Capacity

- Lack of funding and dedicated personnel are cited as the main factors limiting the production of digital content
- Other limiting factors include skills shortages and technical constraints (such as hardware, bandwidth, firewalls etc)
- Lack of training and attitudes to digital may be connected

### Creativity

- Social media channels are currently being used by most organisations to repackage and 'push' content
- Creative use of content by third parties is not widely encouraged

### Control and monitoring

- Most organisations use simple methods of controlling unauthorised use of digital material
- There are some examples of a relaxation of control to find a new balance between access, control and credit to facilitate creative use and create value from collections beyond institutions
- The majority of organisations regularly monitor web usage but it is unclear how this information is fed into the development cycle

## Learning

- There is a close fit between the activities of museums, libraries and archives and formal learning providers suggesting Shakespeare and Shakespeare collections are to a degree embedded in the curriculum
- Digital technology is being used to package teaching resources using collections material but it is unclear whether learning is integral to digitisation or priorities for digital access

## Social Media

- Social networking and blogging is the most active area of experimentation and development for most organisations across the sample
- There is scope for greater use of Web 2.0 technology in providing access to expertise, integrating social sharing with collections management, and encouraging user-generated content

## Income generation

- Most organisations continue to use traditional ways (such as image sales) of generating revenue from collections
- The most innovative work in crafting new business models is being done by government-funded organisations but there may be transferrable lessons for the wider sector

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## 1. Introduction

### **What did this audit aim to do?**

The audit aimed to find out how organisations which hold significant Shakespeare collections employ digital technologies to encourage access and use of those collections<sup>1</sup>. This report has 10 main sections which relate the results from an audit which asked a series of strategic and practical questions on digital. This report also provides analysis on the findings incorporating examples of best practice from within and without the sample to provide a benchmark for the use of digital in improving collections access.

### **Why was the audit carried out?**

Many museums, libraries and archives find themselves in a quandary brought about by the fast pace of change in the application and use of digital technologies, and the changing expectations of users. There is undoubtedly strong public demand for larger amounts of digital content and greater access to it and deciding how to respond to this has become a major strategic concern for many cultural organisations which need to square mission with market.

The Shakespeare Birthplace Trust (SBT) is one such organisation considering how it should move forward on the digital front. Following the creation of a joint research fellowship which focuses on digital with the Shakespeare Institute (SI), the SBT and the SI became interested in undertaking a benchmarking study on digital access across the Shakespeare sample which would be of use to the SBT and possibly to other organisations beyond Stratford-upon-Avon in charting a digital course. Under the auspices of the Shakespeare Libraries Forum, an audit was conceived which would include the world's principle Shakespeare collections.

Since no other audits of its kind were found beyond physical access audits (eg. DDA audits) and the MLA's web accessibility audit<sup>2</sup>, the format for this digital access audit was primarily shaped by questions which Shakespeare Birthplace Trust was asking of itself, an awareness of current issues in the museums, libraries and archives sample surrounding digital, and examples of best practice.

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<sup>1</sup> For the purposes of this report, access is something which is made possible when physical, cultural, social, financial, intellectual, psychological and emotional barriers to learning from and enjoyment of collections are removed, reduced, or overcome. Digital access is simply the use of applications of digital technology to facilitate access to collections

<sup>2</sup> Museums, Libraries and Archives Council, *Accessibility of museum, library and archive websites: the MLA audit* (London: City University, 2005)

## How was the audit conducted?

Once objectives for each area of the audit were resolved, a webform was generated using Wufoo<sup>3</sup> and the link posted to the primary contact at each organisation. In many cases the audit was passed to Digital or New Media departments for completion. Once the completed forms were received, data was collated and analysed. Comparable examples were identified to help provide benchmarks in the report. The audit was conducted by a Research Fellow jointly appointed by the Shakespeare Institute and the Shakespeare Birthplace Trust, between April – July 2011.

## What were the parameters of the audit?

- For the purposes of the audit, a Shakespeare collection is taken as a collection of items related to the life, work and legacy of William Shakespeare (1564-1616) which may or may not be regarded as a discrete collection historically or currently
- The geographical scope of the audit was unconfined; decisions on which collections would be invited to take part was made on the relative significance of collections and their use in teaching, learning and research
- The audit is more about width than depth – it acts more like a general checklist of how digital is currently being used but does signpost further possible research
- The audit does not include analysis of areas such as WAI<sup>4</sup> web accessibility testing since this has already been widely analysed and discussed
- The accessibility of descriptive metadata and images is touched upon in the report but warrants more detailed research given its importance in locating content online

## Which organisations took part?

20 different organisations were selected and invited to take part in the survey based on the significance of their Shakespeare collection. 14 organisations responded and make up the sample for the audit:-

No.	Organisation	Website
1	Bodleian Library, University of Oxford, Oxford	<a href="http://www.bodley.ox.ac.uk/">www.bodley.ox.ac.uk/</a>
2	Birmingham Central Library, Birmingham	<a href="http://www.birmingham.gov.uk/centrallibrary">www.birmingham.gov.uk/centrallibrary</a>
3	Shakespeare Institute Library, University of Birmingham, Stratford-Upon-Avon	<a href="http://www.library.bham.ac.uk/using/libraries/shakespeare.shtml">www.library.bham.ac.uk/using/libraries/shakespeare.shtml</a>
4	Newberry Library, Chicago	<a href="http://www.newberry.org/">www.newberry.org/</a>
5	Folger Shakespeare Library, Washington D.C.	<a href="http://www.folger.edu/">www.folger.edu/</a>

<sup>3</sup> Wufoo [www.wufoo.com](http://www.wufoo.com) [17/08/2011]

<sup>4</sup> WAI = Web Accessibility Initiative, created by the World Wide Web (W3) Consortium, [www.w3.org/WAI/](http://www.w3.org/WAI/) [24/08/2011]

6	University of Bristol Theatre Collection, Bristol	<a href="http://www.bris.ac.uk/theatrecollecion/">www.bris.ac.uk/theatrecollecion/</a>
7	Dulwich College Archives, London	<a href="http://www.dulwich.org.uk/Document_1.aspx?id=1:29395&amp;id=1:29089&amp;id=1:29083">www.dulwich.org.uk/Document_1.aspx?id=1:29395&amp;id=1:29089&amp;id=1:29083</a>
8	Shakespeare Birthplace Trust, Stratford-Upon-Avon	<a href="http://www.shakespeare.org.uk">www.shakespeare.org.uk</a>
9	Royal Shakespeare Company, Stratford-Upon-Avon	<a href="http://www.rsc.org.uk">www.rsc.org.uk</a>
10	Huntington Library, San Marino	<a href="http://www.huntington.org">www.huntington.org</a>
11	National Library of Scotland, Edinburgh	<a href="http://www.nls.uk">www.nls.uk</a>
12	The National Archives, London	<a href="http://www.nationalarchives.gov.uk">www.nationalarchives.gov.uk</a>
13	British Library, London	<a href="http://www.bl.uk">www.bl.uk</a>
14	The V&A Museum, London	<a href="http://www.vam.ac.uk">www.vam.ac.uk</a>

## 2. Findings

### a. Digital Strategy – the bigger picture

In order to discover how strategic and confident the sample is in thinking about digital, the following key questions were asked:

- How strategic is planning for digital activities within an organisation?
- How many strategies are embedded and how many are stand-alone?
- Do organisations collaborate on digital?
- To what extent are organisations being experimental / trying new initiatives?

The audit found that 43% of organisations have a stand-alone digital strategy and 57% described digital as embedded across all activities, i.e. that digital is incorporated in other strategies. On closer inspection, the stand-alone strategies referred to by the 43%, range widely from a Digital Assets Policy to a set of IT Objectives rather than a distinctive digital strategy specifically for collections. It is not clear from the audit whether those organisations who have embedded digital into strategy either consider digital to be an integral part of their normal day-to-day activity and have built this into planning or whether they haven't yet responded to the new opportunities and challenges that digital technologies and behaviours have created. Deeper research is needed in this area. The data suggests that there is no standard approach to strategising on digital and little consensus on what a digital strategy (either embedded or stand-alone) looks like<sup>5</sup>. This is confirmed by the relative abundance of *digitisation* strategies and plans and the paucity of broader digital planning documents, inferring that the process of conversion (i.e. digitisation) has taken the lead in coming to terms with digital in recent years, rather than the wider application of digital

<sup>5</sup> I was not able to locate any templates for an embedded digital strategy online and when asked for examples from the 57% of the sample was told that these documents were 'work in progress' and were not available

across every activity of the museum, library or archive. There does not appear to be a structural rationale as to whether an organisation has an embedded or stand-alone digital strategy: only half of those organisations which have dedicated IT or new media departments have a stand-alone digital strategy. Looking beyond the sample, there are some examples of integrated digital strategies in the commercial sector, particularly in marketing and publishing<sup>6</sup>, but it is clear that it is not just the heritage sector which is grappling with digital and strategy. Further research in this area might include determining the role of governing bodies and the importance of leadership in creating digital strategies, qualifying the digital / digitisation distinction, and looking at examples of embedded digital strategy.

And how far does this thinking on digital extend beyond organisational boundaries? 71% of organisations have partnership agreements relating to digital projects revealing that collaboration has become the 'norm' for most organisations. 36% of organisations have teamed up with other organisations to create joint or commons databases such as WorldCat, CultureGrid, LUNA Commons and COPAC; these are all strategic initiatives driven by digital access. The reason for this could be because of the close ties between like-collections, or the fact that many organisations have links with large content users such as educational institutions (see section on Learning below) and digitise on demand, or it could be because of the economies of scale associated with undertaking expensive digitisation projects in partnership<sup>7</sup>. Regardless of the reason, partnerships on digital projects or longer term initiatives are common and widespread across the audit sample.

Drilling down to ascertain what each organisation considers a priority with respect to digital access, questions which followed in the audit were designed to test the motive forces behind digital activity. This was read by most organisations as either 'why do you digitise?' or 'which areas of the collection do you consider priorities for digitisation?' and most responses came back confirming that access was the main reason for digitising (as opposed to conservation, which was termed a 'secondary benefit' by one organisation) and singling-out priority areas of the collection (such as out-of-copyright material or items unique to the collection). Although one or two organisations referred to mission-led priorities (such as the provision of materials for distance learning) for digital access, it is clear that a good deal of current digital work is market-driven, i.e. that an organisation's digital priorities are demanded rather than arising from a more strategic appreciation of digital in its broadest sense. Although beyond the remit of this audit, further research around the issue of digital exclusion – to what extent organisations are aware of it and what they are doing to combat

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<sup>6</sup> Anna von Veh, Say Books, <http://saybooksonline.com/why-publishers-need-an-integrated-digital-strategy/> [21/07/2011]

<sup>7</sup> Department for Culture, Media and Sport, *Encouraging Digital Access to Culture*, (London, DCMS, March 2010), p.19

it - would be of interest especially given the DCMS's concern over the 'digital divide'<sup>8</sup>. Generally speaking, then, lack of clarity in digital priorities may suggest a lack of strategic thinking on digital, the 'how' overshadowing the 'why'.

Interestingly, no organisations are currently experimenting with new or emerging forms of digital technology with the possible exception of some forms of social media (see below), perhaps betraying a lower level of confidence or lack of capacity in this area. Even established applications of digital technology are not much used by the sample: 57% of organisations produce podcasts, while 43% regularly produce videocasts – slightly less (36%) claim to offer interactives online, still less (14%) live streaming. Virtual tours of collections / venues are rare: only 29% of organisations offer any tours of this sort, and only half of these are available online. Only one organisation (V&A) carries out 3-D scanning of objects: the reasons behind low uptake on representing objects in three dimensions are unclear but may be due to the nature of collections, the nature of demand, or the nascent development of technologies associated with 3-D scanning and visualisation. Similarly, only one other (Shakespeare Birthplace Trust) has used augmented reality technologies, and few are using Quick Recognition (QR) tagging. This suggests most organisations are unaware or do not see a need for the newest technology, or are not in a position to invest. The British Library's position on new technologies is that they will not invest in 'bleeding edge' technologies unless there is a strong business case or if the technology has matured to make it more stable, reliable, more widely used and affordable<sup>9</sup>. This level of caution reveals underlying concerns – even from one of the largest collections of its kind in the world – about levels of investment and the current economic climate, lack of surety on uptake and impact, and something of a pack mentality in adopting new technologies.

Summing up, there is a great deal of uncertainty about how to respond strategically to digital: the pace of change appears to be driven by the rate of public's uptake and use of new technologies, rather than by proactive and creative development by the heritage sector. This is perhaps symptomatic of a mixture of technologies at various stages of maturity without a clear consensus on what is generally accepted as state-of-the-art<sup>10</sup>, and a shifting and competitive marketplace. Much of the manoeuvring by the sample in response appears to be tactical and reactive rather than proactive and wholly strategic; some experimentation and innovation has resulted from this non-classical approach to strategy described by Mintzberg which prizes more the doing than the creation of a planning

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<sup>8</sup> Department for Communities and Local Government, *Understanding Digital Exclusion: Research Report* (London: Department for Communities and Local Government, October 2008), p.5

<sup>9</sup> British Library, <http://www.bl.uk/aboutus/stratpolprog/digi/digitisation/digistrategy/> [22/07/2011]

<sup>10</sup> See article, 'Technology Maturity Lifecycle', Wikipedia, [http://en.wikipedia.org/wiki/Technology\\_lifecycle](http://en.wikipedia.org/wiki/Technology_lifecycle) [17/08/2011]

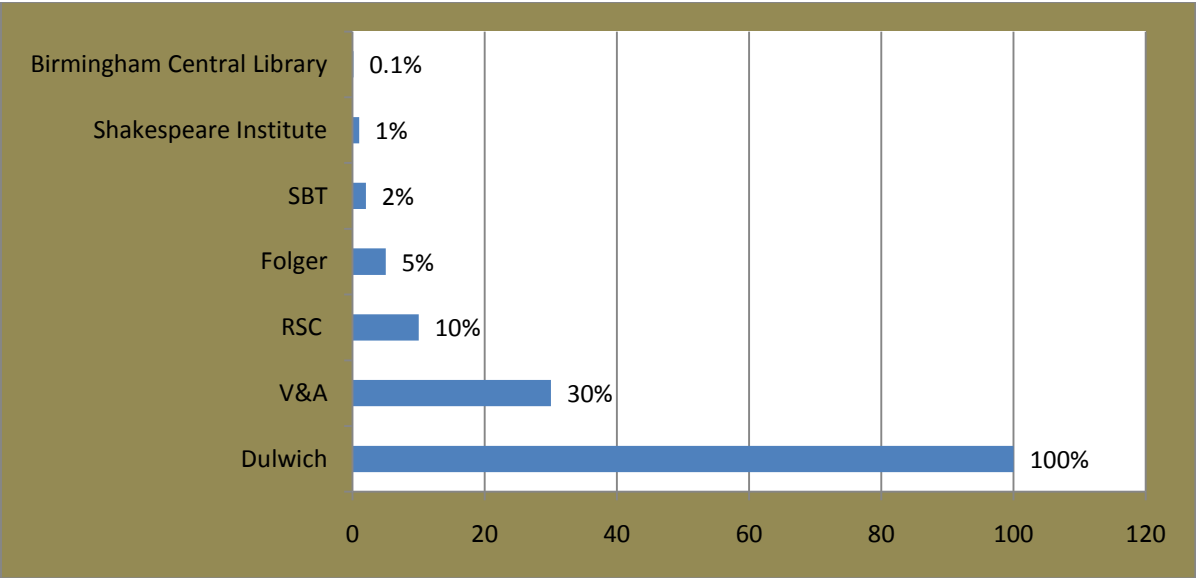
document<sup>11</sup>. There is, however, strong evidence of strategic thinking beyond the confines of a single collection given the amount of collaboration around digital and the tendency among some organisations to think more broadly about digital and embed this in strategy and practice across all operations.

b. Digitisation

This section attempted to find out more about the conversion to digital format, how this is done and how this new material may be accessed. The key questions were:

- How much collections content has been digitised to date and in which format?
- How is most digitisation carried out?
- How is that content structured?
- What is the primary pathway to digital content?

The amount of digitised content as a percentage of the collection varies enormously:



There are no doubt complex reasons behind the levels of digitised content at different organisations, ranging from resources available, to nature of collections, to institutional agendas, as well as different internal yardsticks used for what constitutes ‘digitisation’. Also, the size of what may loosely be classified as the ‘Shakespeare collection’ does also vary: at Dulwich for example the collection only comprises 7 items (100% digitised), at the SBT the collection stands at 500,000 items (2% digitised), whilst the V&A has approximately 100,000

<sup>11</sup>Bjorn Haugstad, [http://www.kunne.no/upload/Gamle%20publikasjoner/Nedtegnelser/Strategy%20Theory\\_N0299\\_Haugstad.pdf](http://www.kunne.no/upload/Gamle%20publikasjoner/Nedtegnelser/Strategy%20Theory_N0299_Haugstad.pdf), pp4-5 [06/06/2011]

items (30% digitised), which puts the percentages into perspective. What is more revealing is perhaps the story behind how these levels vary: it is entirely reasonable to assume that almost a third of the Shakespeare collection at the V&A has been digitised specifically because of a determined mass digitisation programme over recent years, showing how policy and strategy can drive digitisation.

Almost all organisations undertake digitisation in-house; the one notable exception is the British Library which has set up a number of commercial partnerships since 2007 to undertake mass digitisation of collections<sup>12</sup>. There is a strong correlation in the sample between the size of an organisation and the manner of digitisation: the 35% of organisations which do not primarily digitise to order include the British Library, the National Archives, V&A and the National Library of Scotland. This demonstrates a tendency for more proactive programmes of digitisation in larger organisations, perhaps as a consequence of steadier streams of funding for such work tied to public and political expectations over access (see Income section below).

The audit found that 86% of organisations make information available in online databases, the primary pathway to collections data and the principle way of structuring content. 64% of organisations have more than one database which suggests that a number of legacy systems remain within the sample, or that data management is more complicated for Shakespeare collections (which straddle domains and subjects); those organisations that have only a single database tend to be smaller in scale. In terms of visibility of data, only 43% of these databases are accessible from the main page of their website. A wide range of proprietary databases are employed across the sample but among the most used are Ex Libris Voyager (21%), CALM (17%), iBase (17%), and Modes, MONGO DB, and CONTENT DM (each 8%): the adoption of library and archive databases reflects the nature of most Shakespeare collections (i.e. paper-based and bibliographic) in the sample. 79% of organisations have images within their collection database; almost half of these have a linked but separate image management system while the other half has images incorporated within the database. There is a shared database in the sample which contains largely collection-level descriptions from important Shakespeare collections in the UK. *Touchstone*<sup>13</sup> was created by the British Library Co-operation and Partnership Programme a number of years ago and, although it offers a database with details of five major collections – there is a lack of ownership among partners and, as a result, the shared database has not been kept up-to-date. Further research into how data is managed with a view to promoting access might

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<sup>12</sup> Cristina Jimenez, BBC, <http://news.bbc.co.uk/1/hi/technology/7018210.stm> 05/07/2011

<sup>13</sup> British Library Co-operation and Partnership Programme [www.touchstone.bham.ac.uk](http://www.touchstone.bham.ac.uk) [22/07/2011]

include asking to what extent search engine optimisation, free text searching and other developments in generating open metadata<sup>14</sup> are being adopted by the sample.

From the audit we can see then that levels of digital content (images and metadata) vary widely across the sample: larger organisations have been able to gather large amounts of content through programmes of mass digitisation, often involving a commercial component (normally through partnership with a commercial digitisation company and by creating a compelling business model which forecasts return on investment). Smaller organisations are more likely to be adding content through digitisation-to-order or smaller scale digitisation projects. This information is then made available through online databases, most commonly there is more than one available though visibility of these databases is generally poor. The way that organisations digitise and how this information is then made accessible seems to have as much to do with size and strategic vision as it does with capacity, discussed in the next section.

### c. Capacity

Owing to the levels of investment required for digitisation and other digital activity, another area of critical interest in determining how digital is used to facilitate access is capacity. This section asked the following questions:

- How are organisations structured and resourced for digital activities?
- Are there any resource gaps (staffing, equipment, skills)?
- What are the main limitations on digitising material?

64% of organisations have a digital or new media department, 21% higher than the figure for the number of organisation with stand-alone digital strategies (43%). The larger organisations tend to have dedicated departments, but there are some notable exceptions eg. the Folger Shakespeare Library does not have a separate department for IT but the Library as a whole has a number of IT-related staff within its Administration and Central Library departments. For those organisations that don't have dedicated departments or individuals, the tendency is to use short-term funded projects to bring in capacity or for tasks to be spread across the organisation.

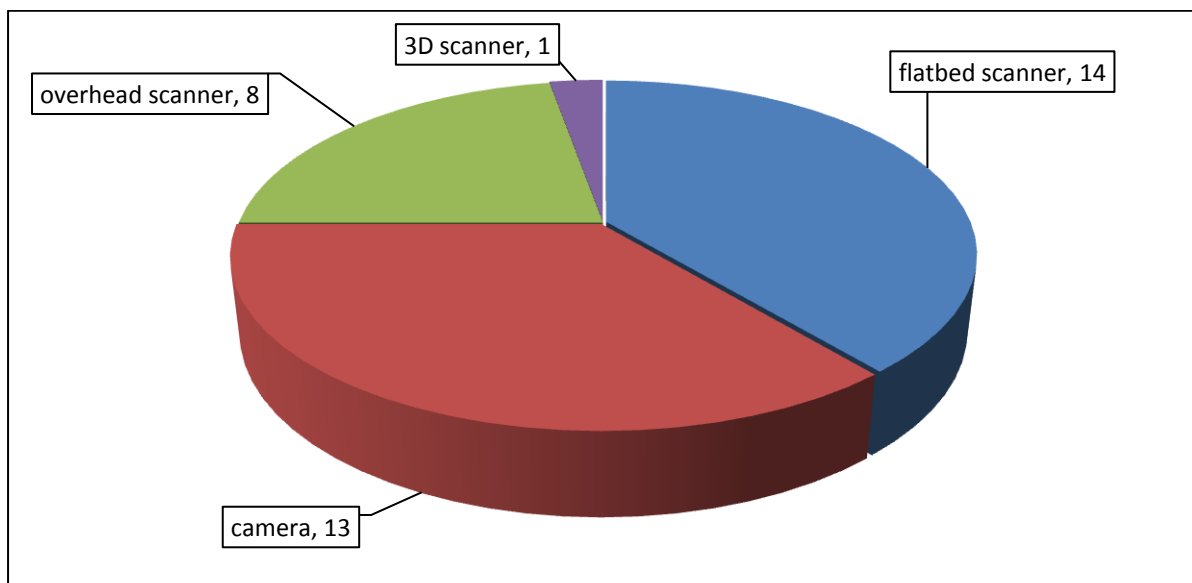
Resource gaps identified by the audit include lack of additional personnel for new projects, and technical skills (such as knowledge of interface design; Linux / Unix; file type identification and metadata extraction). At the time of writing, the British Library is carrying out a digital skills audit, the results of which should expose any specific gaps in relation to tasks that involve digital. Across the sample, 79% of organisations do not provide regular training courses that involve digital for staff – this corroborates the main limiting factors of

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<sup>14</sup> UK Discovery Taskforce, [www.discovery.ac.uk/](http://www.discovery.ac.uk/) [21/07/2011]

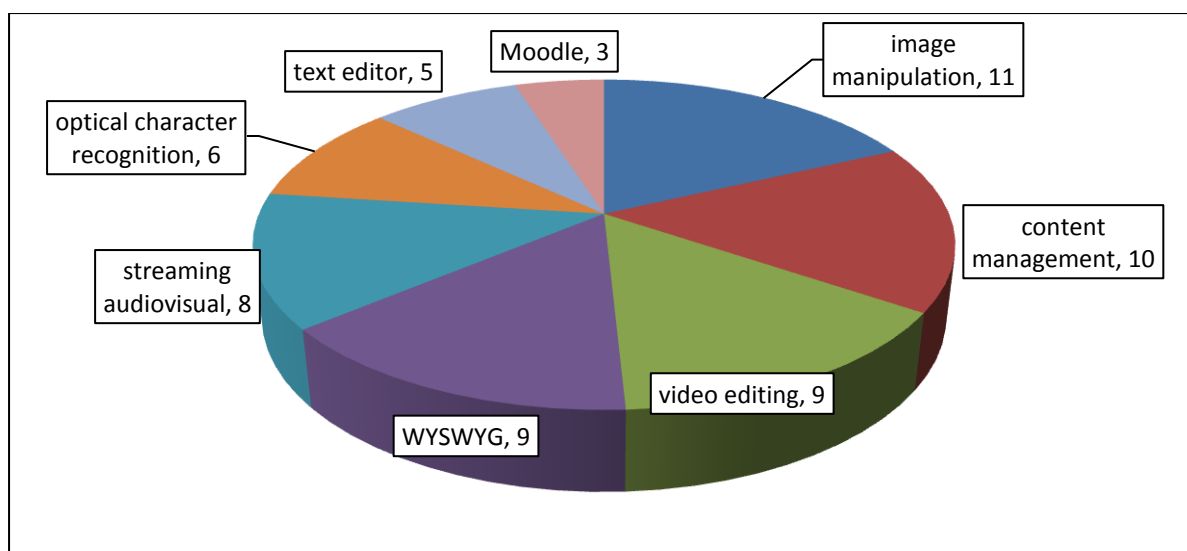
staff time and skills cited as the main limiting factors in digital. Most organisations said capacity (time, skills, accommodation, financial resources) were holding back progress on digital activities but also technical restraints such as bandwidth and firewalls, and lack of scalable digital storage were given as limiting factors. One organisation also highlighted lack of coordination as a hindrance to progress in digital projects, although it was unclear whether this meant internal coordination or coordination with external partners. An interesting development of the audit might be to probe notions of the additionality of digital activity i.e. to what extent does the sample perceive digital to be an ‘add-on’ to other activities.

The most commonly used tools used to capture digital content are shown in the table below:-



**Hardware regularly used across sample**

This shows, unsurprisingly, that a combination of cameras and flatbed scanners are being used to carry out digital capture and that overhead and 3D scanning are not as widely employed, perhaps indicative of the nature of collections (flat or two dimensional material) or the mode of carrying out digitisation (overhead and 3D scanners tend to be used in more specialist services) or indeed the capital and whole-life costs of overhead scanners. The table below demonstrates that a broad range of software packages and digital tools are being routinely used across the sample, with widespread use of optimisation, editing and transcription tools associated with the capture and post-capture stages of digitisation. The use of web editing and streaming software is a good sign that the sample is not stopping with digital capture but considers access and delivery a part of core activity.



**Software regularly used across sample**

Therefore, a lack of training in new digital skills may be undermining confidence and discouraging an experimental approach to collections access; underlying notions of the ‘additionality’ of digital might also be holding back progress in terms of whether new skills should be developed in-house or whether there is a need to outsource extra capacity especially for digital projects. A skills audit that includes questioning on perceptions and attitudes would provide a more strategic overview of capacity gaps within and between organisations.

#### d. Creativity

Speaking of a perceptible shift in the politics of access in her formidable essay ‘From “Access” to “Creativity”: Shakespeare Institutions, New Media, and the Language of Cultural Value’, Dr Kate Rumbold points out new, more ‘active’ sources of publicly-recognised value beyond access, brought about by ‘interactivity, participation, [and] creativity’<sup>15</sup>. With this new form of value creation in mind, this section focused on creative use of digital assets, asking the following questions:

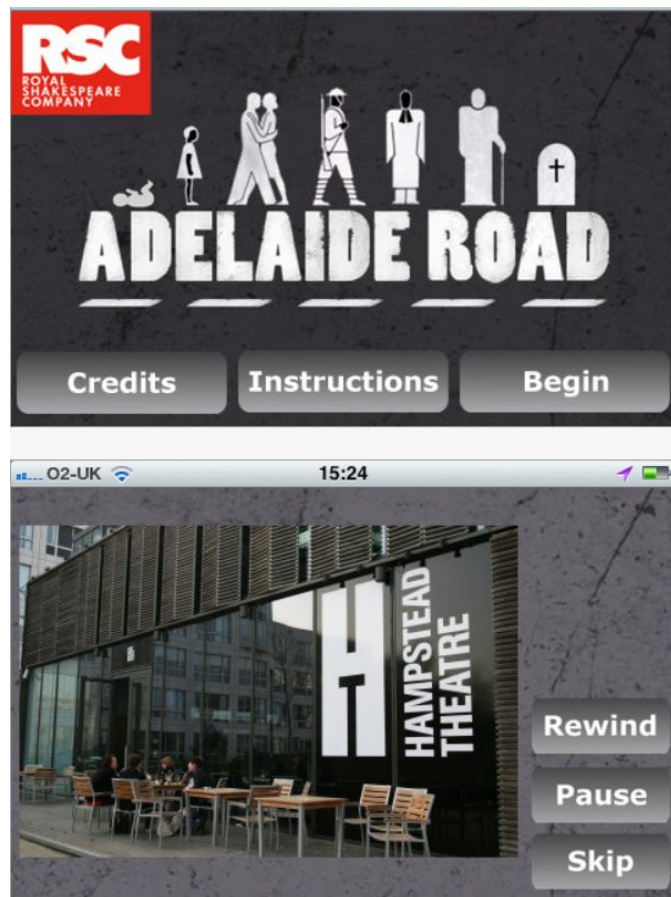
- What kinds of creative uses of digital content are being actively encouraged?
- Are organisations facilitating creative use of content, demonstrating potential use by example, or are they restricting use of content?

Although there appears to be a wide variety of ways that digital content is being released by organisations (for example, 57% of organisation use photo-sharing web services such as Flickr), and evidence that barriers to access are being lowered for scholarly use (such as permitting readers to photograph items or waiving fees for academic publications) in

<sup>15</sup> ‘From “Access” to “Creativity”: Shakespeare Institutions, New Media, and the Language of Cultural Value’, in *Shakespeare Quarterly*, Volume 61, Number 3, Fall 2010 (Chicago: John Hopkins Press, 2010), p.314

general the sample seems to be less active in encouraging third party creative use of collections. Most activity in this area is focused on internal interpretation (such as the RSC's use of its digital collection in the production of new plays) and repackaging of content (eg. the Dulwich archives' excerpts from Henslowe's diary via Twitter) rather than a less hands-off approach to use of content. Encouraging user-generated content via collaborative tagging is a way of bridging access and creativity since this requires public participation in the suggestion of theme tags which may be incorporated into the official record. Only 29% of organisations facilitate user-generated content at the moment. One of the areas of quickest growth has been in creating new content for macro-blogging sites such as Wordpress and Tumblr: 43% of organisations have a collections-specific blog (discussed below). All of this indicates that organisations are being more creative in using self-generated material but that ownership of this process has not demonstrably shifted outside the 'walls' of the organisation<sup>16</sup>.

There are, however, notable exceptions. For instance, courses in digital photography in the V&A galleries offer an example of a refreshingly open and empowering initiative to encourage the use of digital tools in re-presenting collections, as is their forward-thinking crowdsourcing invitation that aims to get users involved in cropping images on the database<sup>17</sup>. Equally positive, is their technical statement on the potential use of the API for their collections database that supports their claim to, 'maximise access to our collections and encourage use of them'<sup>18</sup>. Although none of the sample reported that they had used digital artists-in-residence, 21% of



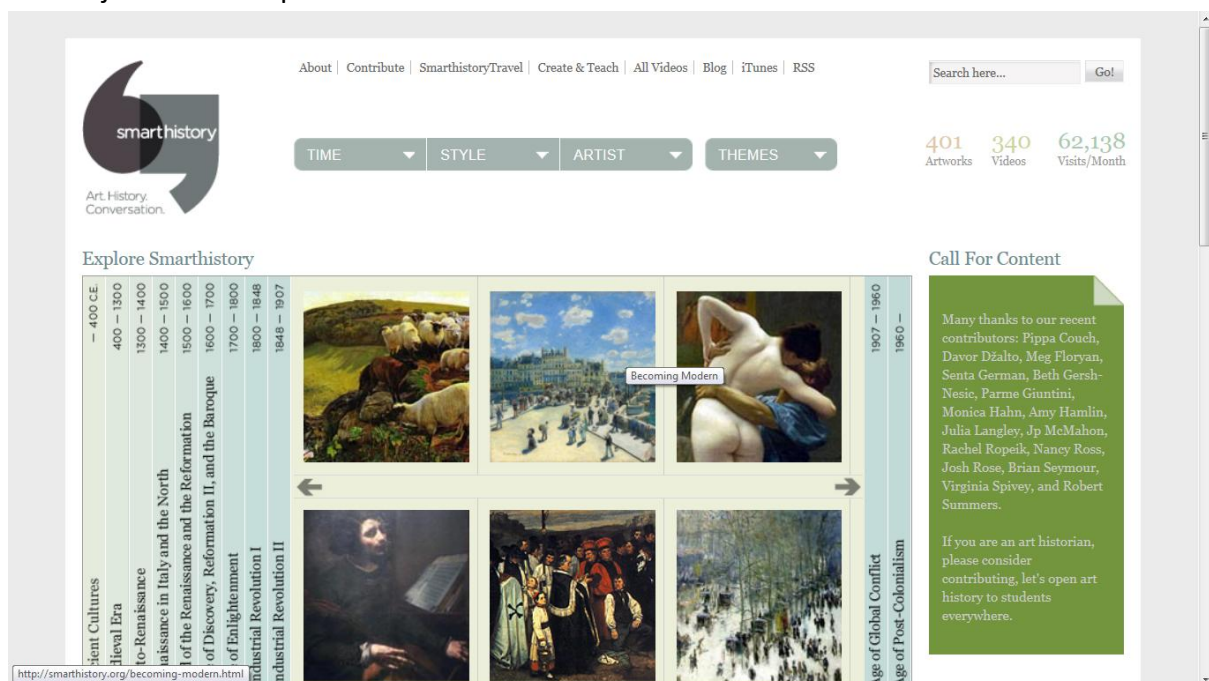
<sup>16</sup> *Ibid*, p.320

<sup>17</sup> V&A Museum, <http://collections.vam.ac.uk/crowdsourcing/> [06/07/2011]

<sup>18</sup> V&A Museum, [http://collections.vam.ac.uk/information/information\\_apiterms](http://collections.vam.ac.uk/information/information_apiterms) [06/07/2011]

organisations have been, or are currently involved with, digital arts projects ranging from the RSC's imaginative 'Adelaide Road' mobile app project<sup>19</sup> and its 2010 Twitter project 'Such Tweet Sorrow'<sup>20</sup>, to the National Archives' involvement in the Archives Awareness Campaign<sup>21</sup>. Although use of collections material varies enormously, the idea of using apps as a form of outreach is ambitious and forward-thinking. It is probably no coincidence that those organisations who own art collections or whose business it is to focus on performance are being most creative with digital collections, in a sense continuing the tradition of reinterpretation of source material.

From outwith the sample, a good web initiative that is driven by user-generated content and which therefore shifts the onus on creating value from institutions to users is [www.smarthistory.org](http://www.smarthistory.org) which encourages anyone to upload a video commentary on a particular work of art or gallery visit, which are then organised by theme, artist, venue etc. The emphasis is on alternative guides to works of art and the website acts as an attractive store for a range of digital apparatus (blogs, video, apps) that could easily be transferred to the subject of Shakespeare.



#### e. Control and monitoring

Although there is a great emphasis on opening access to digital resources, this section aimed to shed more light on how organisations attempt to control access, and how they monitor uptake and performance. The following questions were asked:

<sup>19</sup> RSC, <http://www.rsc.org.uk/explore/projects/adelaide-road/> [06/07/2011]

<sup>20</sup> RSC, <http://www.rsc.org.uk/explore/projects/such-tweet-sorrow.aspx> [21/07/2011]

<sup>21</sup> Archives Awareness Campaign, <http://www.archiveawareness.com/> [06/07/2011]

- What kinds of restrictions are in place for controlling use of data / images?
- How do organisations monitor uptake?

The most common safeguards used by the sample to prevent unauthorised commercial use of content is the use of low resolution images (86%) and watermarking (21%) or a combination of the two techniques. Only 7% of organisations employ a disable-save function or copyright declaration check before enabling use of content. Larger organisations, such as the Folger Library and the V&A, have online policy statements on copyright. The V&A has recently relaxed restrictions on academic use of images allowing free use on publications below 4000 copies; although fees apply to any new digitisation required for academic use, the direction is very much in line with the museum's mission and an institutional shift in line with the DCMS's call to relax control on image availability and use in response to market (public) demand<sup>22</sup>. Other models for regulating use of material without deterring access includes initiatives such as the Virtual Manuscript Room, a collaboration between the University of Birmingham and the University of Munster<sup>23</sup>. Access to images and transcriptions on the website is unrestricted but special time-limited access (using temporary URLs) for registered groups of users or single users to high quality images or rights-sensitive material not available on the website is possible in a way that permits access but controls use.

The digital access audit points to the types of online usage information being routinely logged across the sample. 71% of organisations evaluate web usage using a variety of basic on-site analytics such as page hits, landing pages, clicks, bounce rates, visit and session length, and downloads, as well as more demographic information such as visitor geolocation, new / repeat / unique visitors, and so on. Further investigation might reveal how this data is being used by the sample to create key performance indicators or how off-site analytics influence design and the measurement of uptake. Customising reports with data (such as page efficiency, and metrics that measure less 'accidental' visitors, etc) which is truer to an organisation's objectives and to qualitative visits to websites can allow a better picture to emerge of what kind of content is appealing to what kind of visitor / user. An interesting case study of how Google Analytics can be used by a library to know its audience and plan for change was carried out in the Rutgers-Newark Law Library by Wei Fang as far back as 2007<sup>24</sup>. Although the audit did not look at licencing of content, further research

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<sup>22</sup> DCMS: *Encouraging Digital Access to Culture*, (London, DCMS, March 2010), p.8

<sup>23</sup> Virtual Manuscript Room, Universities of Birmingham and Munster, <http://vmr.bham.ac.uk/about/> [18/07/2011]

<sup>24</sup> Wei Fang, *Using Google Analytics for Improving Library Website Content and Design: A Case Study* <http://unllib.unl.edu/LPP/fang.htm> [18/07/2011]

could include examining how organisations can find ways to balance access with controls on use and appropriate credits for content owners.

#### f. Learning

This section aimed to ask the following questions:

- How are digital technologies being used to facilitate learning?
- Do organisations have formal links to learning institutions?
- Which formal education groups are targeted?

Although 93% of organisations collaborate with formal learning providers, very few examples were given in the audit of how digital tools are being used to create specific educational resources. The use of Moodle (open source learning management software) in 21% of organisations is a reflection of the closeness of many collections to university teaching but it is unclear exactly how digital content is being used to facilitate learning. For many organisations, the greatest contribution to learning resources comes via the provision of digital images for teaching packs, although 14% of organisations have learning-specific blogs. The Folger library offers an extensive range of electronic resources for teachers and students, including video and audio podcasts<sup>25</sup>. Undergraduate and postgraduate learning groups are the most common learning audiences, but organisations such as Dulwich Archives and the RSC target a broader learning audience. Perhaps the most ambitious project within the audit sample is the National Archives' Virtual Classroom that incorporates digital images into a series of themed live, interactive sessions with National Archives' staff<sup>26</sup>. Podcasts and videoconferencing are also offered as well as face-to-face workshops at the NA's Kew headquarters. Also worth noting is the recent establishment of a skills-based partnership between Shakespeare Birthplace Trust and Digital Theatre<sup>27</sup>, an organisation that collates and retails live theatre performance. It remains to be seen how collections may be utilised in a learning capacity via such collaborations between content providers and hosting specialists but the potential to build on such a platform to develop audiences is considerable.

Beyond the sample, online courses on offer at New York's Museum of Modern Art (MoMA) combine an interesting use of basic digital technology with themed distance learning content<sup>28</sup>. Sessions are largely video-based: lectures and workshops are filmed with a strong emphasis on conversation between lecturer and student, and Q&As during a workshop. A

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<sup>25</sup> Folger Shakespeare Library, <http://www.folger.edu/template.cfm?cid=2936> [21/07/2011]

<sup>26</sup> National Archives, <http://www.nationalarchives.gov.uk/education/virtual-classroom.htm> [18/07/2011]

<sup>27</sup> Digital Theatre, [www.digitaltheatre.com](http://www.digitaltheatre.com) [21/07/2011]

<sup>28</sup> Museum of Modern Art, <http://www.moma.org/learn/courses/courses#evening> [18/07/2011]

large degree of the success of the course is due to the charisma and communication skills of the teacher, as well as the all-encompassing use of video capture. Students normally undertake an asynchronous (and therefore flexible) 10 week course but this normally involves a synchronous discussion activity where images are posted prompting a real time discussion. This is found to stimulate both passive (responses are read rather than heard giving speakers of other languages a chance to assimilate and form a response) and active (prompting reactions and generating creative, original thinking in the exchange of ideas and the uploading of images). A virtual course café also provides a productive and enjoyable social space for students and course teachers.

As universities in the UK face mounting pressure to compete for fee-paying students, the role of collections and digital use of them (particularly in distance learning) will undoubtedly grow to redefine access and enhance the student experience. Growing pressure from funding bodies such as JISC (Joint Information Systems Committee) to create open licences for educational resources as a condition of funding signals a move to not just free-up content, but to free-up use of that content. Shakespeare Collections are already actively involved in this but there is scope for greater use within Higher Education and for non-formal education.

#### g. Social media

This is undoubtedly one of the growth areas for museums, libraries and archives in using digital to widen access to collections. The main questions posed by the audit were:

- How do organisations facilitate collections access via social media?
- Which other ways are organisations utilising Web 2.0?

The graph below shows that Twitter and Facebook, and file-sharing sites such as Flickr and YouTube, are the most commonly used social media platforms. This demonstrates a deliberate move across the sample towards establishing a presence on popular content-sharing media and a willingness to take content to areas of demand. The Shakespeare Birthplace Trust (SBT) has been the most active in the sample in using macro-blogging sites such as Wordpress to host new and repurposed content around its collections, properties, and central mission of 'promoting the life and works of William Shakespeare'<sup>29</sup>. The SBT have set-up four blogging sites<sup>30</sup> held at arm's length from the organisation in terms of domain but fuelled by collections and property-based content coordinated by the Trust. Statistics on levels of use are impressive given the relatively short time these sites have been running. They have become the Trust's main 'voice' and route for the distribution of digital

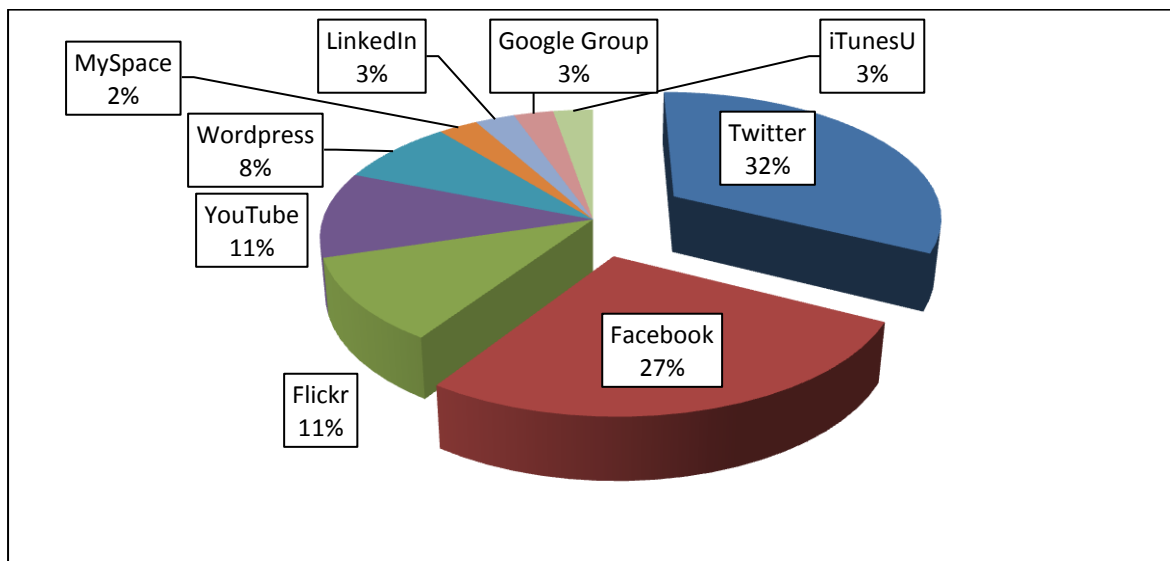
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<sup>29</sup> Shakespeare Birthplace Trust, <http://www.shakespeare.org.uk/about-us.html> [07/07/2011]

<sup>30</sup> [www.findingshakespeare.co.uk](http://www.findingshakespeare.co.uk); [www.bloggingshakespeare.com](http://www.bloggingshakespeare.com); [www.rememberingshakespeare.com](http://www.rememberingshakespeare.com); and [www.livingshakespeare.com](http://www.livingshakespeare.com)

content and recently influenced the redesign of its main website<sup>31</sup>. It is also notable that the SBT’s Flickr themed content, eg. Shakespeare’s Women, is referred to as ‘exhibitions’ especially considering the lack of real display venues owned by SBT in Stratford. Further analysis is, however, needed into users’ perceptions on the quality of content, factors that influence the maintenance of an ongoing relationship with followers or readers of blogs (something which the SBT claim they consider a priority rather than simply building numbers), and what traffic leads to in terms of the user experience and return on investment<sup>32</sup>.

The incremental but rapid growth of blogging platforms at the SBT is also interesting from a strategic perspective. Blogging activity for SBT has been an example of creating strategy by doing: although the organisation still lacks a clear *raison d’être* for social media, the trialling of four platforms and lots of activity around microblogs (Facebook and Twitter) has allowed the SBT to form strategy on-the-move and the Trust’s Collections Department will shortly publish a specific strategy on social media, which will be more of a reflection on practice than a change of direction. Although not part of this audit, some research on how organisations are using social media channels – such as YouTube and Flickr - to push content to users would be valuable as would research around how evaluation (discussed below) is being used to shape content, especially front-end and formative evaluation.

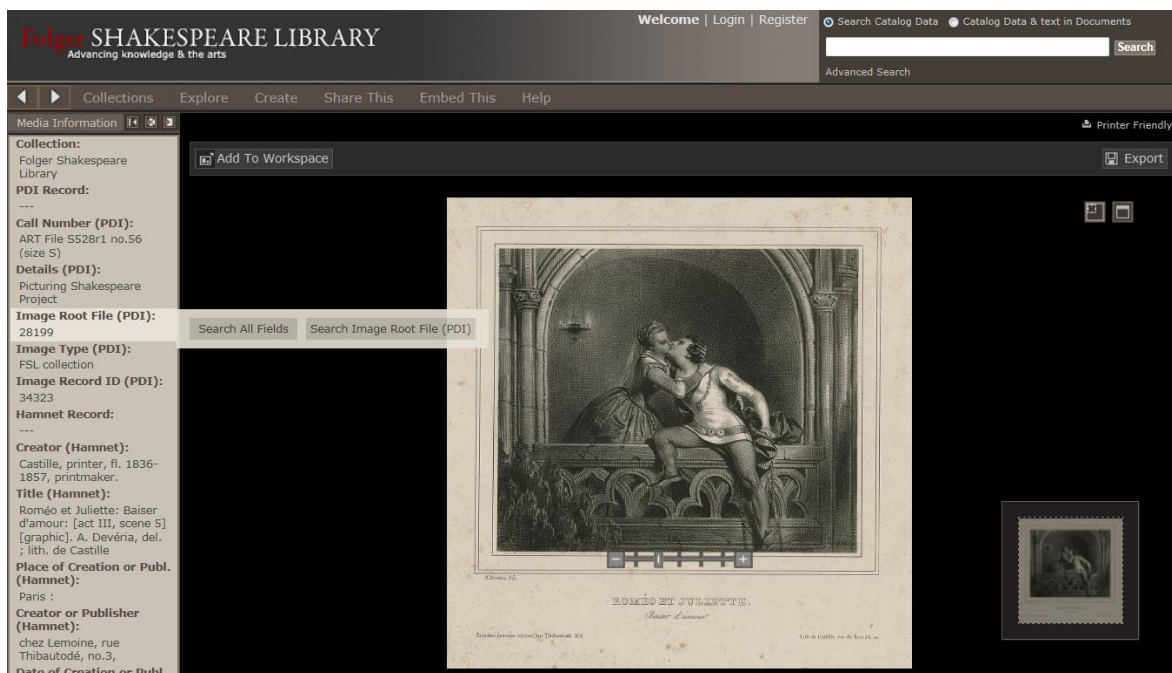


**Social media channels being used by the sample**

<sup>31</sup> Shakespeare Birthplace Trust, [www.shakespeare.org.uk](http://www.shakespeare.org.uk) [21/07/2011]

<sup>32</sup> Pamela Seiple, Hubspot Blog, <http://blog.hubspot.com/blog/tabid/6307/bid/18643/Top-5-Metrics-for-Auditing-Your-Social-Media-Marketing-ROI.aspx> [18/07/2011]

Less widespread in the sample is the offer of direct online question and answer opportunities (only 21% of organisations offer this) and the same number facilitate personalisation of some sort on content such as the ability to save (into an account) and



share content. However, only 16% of organisations (both national libraries) have collaborative filtering functions on their website, of the type commonly used on retail websites ('if you liked this product you might also like...' eg. [www.amazon.co.uk](http://www.amazon.co.uk)).

The Folger Library allows online users to save image selections and create permanent URL links back, share or embed high resolution images, and compare and annotate images selected. In terms of keeping users up-to-date, 71% of organisations offer users feed facilities so that they alerted to new content, going some way to forming a longer term digital 'relationship' with users.

Good projects that point out the potential of social media to facilitate a conversation between those who work in museums, libraries and archives, and those who don't, include the [www.askacurator.org](http://www.askacurator.org) initiative in September 2010 which brought together 240 curators who responded to 10,000 questions in a single day via Twitter. The combination of ease and access that characterised the project suggest initiatives such as this pack a punch as far as the public are concerned and evaluation suggests one outcome could be fresh leads to the organisations concerned. Equally, Indiana University's 'Ask a Librarian' function uses Web 2.0 technology and friendly design to make practitioners more accessible for library users and those beyond the campus<sup>33</sup>. Another example, also shortlisted for the 2011 Museums

<sup>33</sup> Indiana University-Purdue University, University Library, <http://www-lib.iupui.edu/research/askalibrarian> [21/07/2011]

and the Web, Best of the Web competition is Wiki BookCamp Kosmopolis<sup>34</sup> which encouraged the communal creation of content for a literature festival in Barcelona via a webpage, before an online debate hosted live on Tumblr (with associated Twitter and Facebook campaigns). Such experimental use of different platforms and social media tools proved highly effective in generating interest in an event that became part-virtual, part-real (the festival itself took place in October 2010) and led to the creation of content in three different languages.

#### h. Income generation

- How does the organisation monetise the collection via digital?
- To what extent does commercial gain stimulate new digitisation?

By far the main source of income from digital activities comes from image sales to commercial organisations such as publishers: 79% of organisations cite this as the main way that collections are 'monetised'. 14% of organisations generate income via ebooks and apps, and 7% described using image content in saleable bundles. One organisation currently generates no income from digital content, presumably because of its position within a larger organisation which undertakes commercial activities on its behalf. Most smaller organisations operate on a full cost recovery basis for digitising to order (which can mean that this controls the pace of digitisation of content), or on project finance models. An example of bridging the gap between collections and retail elements of an organisation may be found at a small independent sample organisation. The Wiltshire Heritage Museum has recently built a deceptively simple product payments system – Google Shopping – into its collections database<sup>35</sup> demonstrating that income generation and collections management may (at least technically) go hand-in-hand. Also in this vein, the Shakespeare Birthplace Trust are currently partnering with the University of Coventry and two IT companies to create a collections-based mobile phone application which will trial initiatives to generate revenue based on various business models geared towards visitors to Stratford-upon-Avon – a project part-funded by the Technology Strategy Board<sup>36</sup>.

According to the audit, the most innovative business modelling is found among those organisations receiving block-grant government funding; conditions of grant funding in recent years have required recipients to increase the level of self-generated funding while requiring free entry and free use of materials for on-site research purposes. Perhaps this

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<sup>34</sup> Museums and the Web 2011, [http://conference.archimuse.com/mw2011/best/social\\_media/wiki\\_bookcamp\\_kosmopolis](http://conference.archimuse.com/mw2011/best/social_media/wiki_bookcamp_kosmopolis) [18/07/2011]

<sup>35</sup> Wiltshire Heritage Museum, <http://www.wiltshireheritagecollections.org.uk/index.asp?page=image&id=41303> [21/07/2011]

<sup>36</sup> Technology Strategy Board, <http://www.innovateuk.org/> [17/08/2011]

particular set of circumstances and the specialist departments working within each of these large organisations has stimulated the trialling of unique business models such as the British Library's commercial partnerships set-up to bring about mass digitisation of collections<sup>37</sup>, or the National Archives' packaging of content for sale to Licensing Internet Associates or its enlightened non-exclusive licensing scheme<sup>38</sup>. This level of sophistication in forming new ways of balancing a sliding scale of access with raising the investment needed to create content is not necessarily a model that would transfer easily to smaller organisation with less commercially attractive collections, but the inventiveness of finding new ways of generating income, a willingness to work with the private sector, and a fusion of mission and market imperatives, contain lessons for the wider sample.

### 3. Conclusions

So, to what extent is the application of digital technology being used to break down barriers to access to the world's most significant Shakespeare collections? The audit suggests that although strategic thinking for many organisations is either still concerned with the fundamental first step in going digital (i.e. digitisation of collections) and that this may be a factor in considering digital to be strategically distinct, many organisations are looking beyond conversion to a broader appreciation of how digital can be used within institutions and to how digital can be used to bring about a sea-change in utility and value creation from collections. Although the volume of digital content varies widely across the sample, there are signs that organisations are exploiting the unique properties of digital collections (reproduction and manipulation without detriment to collections, providing a currency for remote access, and so on) and Web 2.0 technology (facilitating conversations around collections, promoting sharing and creativity, layering interpretation, providing access to expertise etc) to move beyond straightforward electronic access, to a more fluid relationship between institutions, collections and audiences. The audit points to signs that many (mainly government funded) organisations are confronting the challenge of harnessing return on investment from digital initiatives. Much of the work being done exploring new business models is instructive and may address some of the capacity issues flagged-up in the audit, and in turn promoting a new spirit of adventurism in using digital to widen and deep access to Shakespeare collections.

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<sup>37</sup> Brightsolid, <http://www.brightsolid.com/news/recent-news/british-library-and-brightsolid-partnership-to-digitise-up-to-40-million-pages-of-historic-newspapers> [22/07/2011]

<sup>38</sup> National Archives, <http://www.nationalarchives.gov.uk/business/licensing.htm> [07/07/2011]

#### 4. Acknowledgements

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Karin Brown, Shakespeare Institute Library

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[www.rememberingshakespeare.com](http://www.rememberingshakespeare.com); and [www.livingshakespeare.com](http://www.livingshakespeare.com) [07/07/2011]

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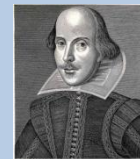
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6. Appendix: the audit questionnaire

<http://shakespearebt.wufoo.com/forms/shakespeare-collection-digital-access-audit/>

## Digital Access Audit

of your Shakespeare Collection



### What is this audit for?

This questionnaire seeks to take a snapshot of how digital technologies are being used by your organisation to facilitate access to objects with a particular association with William Shakespeare (1564–1616).

### All about Shakespeare...

In answering each question, please remember that ‘the collection’ refers to items defined by your organisation as belonging to your Shakespeare collection.

### What will happen to the data?

The results from your questionnaire will be aggregated and analysed together with data from the world’s most significant Shakespeare collections and, using examples of best practices from other organisations, will result in a report which should be of use to all organisations in thinking about access to collections using digital and new media.

### How long will it take to complete?

The survey should take 30 minutes to complete but it would be useful if you could include any examples of policy documents or any other material that may help, which may take a little more of your time.

**Name of Organisation:** [Click here to enter text.](#)

[06/07/2011]

**Name:** Click here to enter text.

**Date:** Click here to enter a date.

## 1. Strategy

- a) Does your organisation have a stand alone **digital** strategy (if so please send a copy)?  
Choose an item.
- b) If not, is digital activity embedded in other corporate strategies?  
Choose an item.
- c) What are your organisation's priorities regarding digital access?  
Click here to enter text.
- d) Does your organisation have any partnership agreements regarding digital?  
Choose an item.
- e) If your organisation has been involved in any digital access projects in the past 2 years, or is considering any in the near future please give details?  
Click here to enter text.
- f) If your organisation has any formal ties to academic departments which specialise in digital technologies or digital humanities, please give details?  
Click here to enter text.
- g) Does your organisation have a **digitisation** strategy or plan?  
Choose an item.
- h) Are you currently experimenting with digital technology new to the organisation?  
Click here to enter text.
- i) Does your organisation take steps to reduce digital exclusion (defined by the UK Govt as barriers towards equality of access to digital technologies brought about by economic or social disadvantage  
<http://www.communities.gov.uk/publications/communities/understandingdigitalexclusion> )

## 2. Content

- a) Roughly speaking, what percentage of your collection exists in some digital format at the moment?

[Click here to enter text.](#) %

- b) Is information (data and images) about your collection available in an online database?

Choose an item.

- c) If so, is the database accessible from the home page of your website?

Choose an item.

- d) Do you have more than one online collection database?

Choose an item.

- e) What type of database is this (specifications, eg. Talis Prism)

[Click here to enter text.](#)

- f) Does this database contain images or is it linked to an online image management system?

Choose an item.

- g) If any of your objects are represented in three dimensions, please give details....

[Click here to enter text.](#)

- h) If your collection is detailed on any other online catalogues, please give details

[Click here to enter text.](#)

- i) Does your database offer collaborative filtering (eg. 'If you liked this object, you might also like...')?

Choose an item.

## 3. Capacity

- a) Does your organisation have a digital or new media department?

Choose an item.

- b) If not, how is digital or social media activity carried out?

[Click here to enter text.](#)

c) How does your organisation currently digitise material?

Choose an item.

d) If your organisation contracts out, please provide information (reason why, terms of service, etc) [Click here to enter text.](#)

e) If there are any digitisation skills gaps in your organisation, please give information

[Click here to enter text.](#)

f) Does your organisation run regular training courses in the use of digital equipment?

Choose an item.

g) What kinds of digital equipment does your organisation regularly use?

Digital camera

Flatbed scanner

Drum scanner

Overhead scanner

3D scanner

Digital projectors

video conferencing

webcams

Other (please state)

[Click here to enter text.](#)

h) What types of software does your organisation regularly use?

Optical Character Recognition

Image manipulation (eg. Photoshop)

Video editing

- Streaming for audio and video content
  - animation
  - Content management system (eg. Drupal, Joomla, Wordpress, etc)
  - WYSIWYG Editor (eg. Dreamweaver, Contribute, Frontpage,
  - Text Editor (eg. BBEdit, Notepad, Textedit, etc.)
  - virtual learning environment (eg. Moodle, Blackboard, etc)
  - video conferencing (eg. Webex, Skype, etc)
- Other (please state) [Click here to enter text.](#)

i) Do you offer a help section on your website?

[Choose an item.](#)

j) Generally speaking, what are the main limitations for your organisation in producing new digital content?

[Click here to enter text.](#)

#### 4. Creative Use

a) How does your organisation facilitate creative use of digital content?

[Choose an item.](#)

b) Does your organisation have an artist in residence working with digital media?

[Choose an item.](#)

c) If your organisation has been involved in any digital arts projects please provide information

[Click here to enter text.](#)

d) If your organisation places restrictions on creative use, please provide information

[Click here to enter text.](#)

e) Does your organisation have a collections-related blog?

[Choose an item.](#)

f) If so, who contributes to it?

[Click here to enter text.](#)

g) Does your organisation offer virtual tours online?

Choose an item.

h) Does your organisation make use of augmented reality as a way of accessing collections?

Choose an item.

i) Does your organisation use or encourage the use of any of the following photo sharing web services:

Photosynth

Flickr

Zoomr

**Image Shack**

**DeviantART**

Other (please state) [Click here to enter text.](#)

j) Does your organisation facilitate collaborative tagging?

Choose an item.

## 5. Exhibitions

a) What kinds of digital technologies are used in exhibiting collections offline?

[Click here to enter text.](#)

b) Do these offline exhibitions have an online equivalent?

Choose an item.

c) If so, were they planned at the same time?

Choose an item.

d) Do you offer exhibitions created only for online audiences?

Choose an item.

e) If there are any digital pre-visit or post-visit resources available please give details

[Click here to enter text.](#)

## 6. Learning

a) Does your organisation have an online learning programme?

Choose an item.

b) In what ways does this use collections?

[Click here to enter text.](#)

c) Do you have a learning-specific blog?

Choose an item.

d) Which formal learning groups do you target?

[Click here to enter text.](#)

e) Does your organisation collaborate with formal learning providers?

[Click here to enter text.](#)

## 7. Social media and sharing

a) Which of these social media does your organisation employ from its website?

Twitter

Facebook

MySpace

Digg

Bebo

Delicious

LinkedIn

Other (please state) [Click here to enter text.](#)

b) Can individuals 'follow' the organisation via Facebook or Twitter?

Choose an item.

- c) If your website offers any degree of ‘personalisation’, such as personal accounts or folders, please provide information

[Click here to enter text.](#)

## 8. Commercial

- a) How does your organisation generate income from digital?

- Image sales
- Retail using digital images of collection
- Sponsorship

Other (please state) [Click here to enter text.](#)

- b) If your organisation follows a particular business model, please provide details

[Click here to enter text.](#)

- c) Which controls (if any) do you have to restrict use

- Watermarking
- Low res images
- Subscription access
- Limits on number of images

Other (please state) [Click here to enter text.](#)

- d) Does the organisation primarily digitise to order?

Choose an item.

## 9. Communication

- a) Does your organisation use any of the following means of communicating collections-related information

- Blogs
- Tweets

Facebook

e Essays

e Bulletins

b) Does your organisation offer a direct question and answer facility online?

Choose an item.

c) If so, is this streamed live?

Choose an item.

d) Does your website offer RSS feeds?

Choose an item.

e) Does your organisation publish electronically?

Choose an item.

f) If so, what form does this take: PDF, ebook, Word file etc.

[Click here to enter text.](#)

g) Does your organisation actively evaluate web content?

Choose an item.

h) Does your organisation actively monitor web usage statistics?

Choose an item.

i) If so, which statistics are the most important?

[Click here to enter text.](#)

## 10. Multimedia

a) Which of these multimedia applications does your organisation use as ways of providing access to collections:

Podcasts

Videocasts

Live streaming

Video conferencing

YouTube

App

Other (please give details) [Click here to enter text.](#)

b) Does your organisation use collection interactives (eg. games) online?

Choose an item.

c) If so, are these replicated from interactives used in a gallery?

Choose an item.

d) If your organisation uses barcodes or QR tags please provide more information

[Click here to enter text.](#)

e) If your organisation is currently experimenting with a new form of technology, please provide details

[Click here to enter text.](#)

Please email the completed form and any attachments to [d.hopes@bham.ac.uk](mailto:d.hopes@bham.ac.uk)

Thank you very much! 😊

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Digital Shakespeare: Access Audit

The Shakespeare Institute and The Shakespeare Birthplace Trust, August 2011

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