The Andrew W. Mellon Foundation
Scholarly Communications Program
Proposal Cover Sheet

Please complete this sheet (or the institution's equivalent) and attach it to the institution's final proposal submission.

	[Please type all information in the right-hand column.]
Date	January 3, 2007
Grantee Name	Text Encoding Initiative Consortium
Grantee Legal or Corporate Name, if different	
Internal Reference Number	GP1.2008
Title of Project	TEI Tite: Creating a Benefit of Membership to Support Standards Development
Request Amount	$35,723.79
Grant Period	January 2008-December 2008
Principal Investigator(s) and Title(s)	Daniel O'Donnell, Chair Department of English Lethbridge University Lethbridge, Alberta, Canada
Address	c/o Daniel Pitti, Treasurer TEI Consortium Institute for Advanced Technology in the Humanities 319 Alderman Library P.O. Box 400115 University of Virginia Charlottesville, Virginia 22904-4115
Signature(s) of Principal Investigator	
Sponsored Programs Contact	Daniel O'Donnell, Chair TEI Consoritum
Address	323 14th Street South Lethbridge Alberta Canada T1J 2X5
Signature of Sponsored Programs Officer	

TEI Tite: Creating a Benefit of Membership to Support Standards Development
A proposal submitted to the Andrew W. Mellon Foundation
by Daniel O'Donnell, Principal Investigator
with John Unsworth and Perry Trolard, Co-Principal Investigators
on behalf of the Text Encoding Initiative Consortium
January 3, 2008

Background:

The Text Encoding Initiative (TEI) is a community-based effort to establish and maintain guidelines for encoding machine-readable texts for the purpose of literary and linguistic study. The history of the Initiative is documented on its web site, at http://www.tei-c.org/About/history.xml, but a brief summary of that history would include the fact that it was established in 1987, that it was incorporated as a non-profit membership organization (the TEI Consortium) in 2000, and that it has issued three major and two minor revisions of its guidelines, the most recent (called P5, for the fifth public release) in October of 2007. The TEI's membership consists of library and scholarly text-encoding centers and projects worldwide, with 81 institutions from 19 countries represented. It is governed by an executive board, and the maintenance and development of the Guidelines are overseen by a technical council elected by the members: both are elected by members at an annual members meeting. The TEI Guidelines are distributed free of charge in XML, HTML, and PDF from the organization's web site, and published in print for a reasonable price. The TEI is arguably one of the most important and longest-lasting examples of humanities cyberinfrastructure in existence, and its ontology of literary and linguistic text represents the collective wisdom of hundreds of scholars. It has survived and developed across many generations of computer hardware, software, and standards, with the first three releases of the Guidelines expressed in SGML, the fourth in both SGML and XML, and the most recent in XML; it has also contributed significantly to the development of those standards (the W3C editor of the XML specification was, for many years before that appointment, the North American editor of the TEI), as well as producing a stand-alone ISO standard (Feature Structures, ISO 24610-1:2006).

For many years now, libraries have used TEI to mark up the electronic text collections that they produce out of their own holdings: for example, the Early American Fiction project at the University of Virginia (http://etext.virginia.edu/eaf/) used TEI P3 to encode machine-readable versions of a substantial subset of its holdings of first editions of American fiction from 1789-1875. In projects such as these, the machine-readable texts are produced by companies that specialize in transcribing text to the computer, from page images. In spite of advances in optical character recognition technology over the years, these companies still offer a superior degree of accuracy in transcription, better than 99% correct. They achieve this by having the text transcribed twice, comparing the transcriptions for variations, and then correcting the variation that is an error. This process is called "double-keyboarding" and the vendors who provide this service are often referred to as "keyboarding vendors."

Libraries who do a lot of etext production, like those at the University of Virginia and the University of Michigan, have developed their own SGML DTDs (document-type definitions) or XML schemas for use with vendors, designed to limit the opportunities for interpretation on the part of the person doing the keyboarding, to tightly constrain tagging for more reliable machine-validation of the vendor's output, and minimize tagging in order to control cost, which is calculated by the keystroke. The library, for its part, expects to do some automated post-processing on the materials once they come

back from the vendor, and will usually also do further manual work on the TEI header, which contains descriptive bibliographic information and information about the production and validation of the electronic text itself.

The keyboarding vendors' business is all about economies of scale: a significant part of the vendor's cost is in setting up the job, establishing the desired output, and adjusting for the type of material to be transcribed (for example, a clearly printed 20th-century text, or a 19th-century newspaper in multiple columns, or a text with significant tabular data or illustration, each of which requires different instructions for the person doing the keyboarding, different quality control processes, etc.). As a result, vendors of this sort are not interested in small jobs, so smaller libraries and scholarly projects generally don't have access to their services. Large academic research libraries with lots of text to encode, on the other hand, can negotiate a price that is substantially cheaper, for better quality, than if they did the work themselves.

TEI Tite:

TEI Tite is a customized TEI schema designed by the authors of this proposal, and approved by the TEI, for use in working with keyboarding vendors. The motivation for developing this schema and encouraging its use is threefold:

1. Since the most expensive part of a keyboarding job is setting up to produce work to a certain specification, adherence to a standard schema would allow small- to medium-sized libraries and scholarly projects to get keyboarding services at a volume discount as part of an annual aggregate of business directed to the vendor by the TEI.
2. Since this volume discount could easily save TEI's member libraries and projects more than the cost of membership, it could become a tangible benefit of belonging to the TEI and as such it would contribute to the long-term sustainability of this community-based standards organization.
3. Since field-tested vendor specs exist in a handful of large academic research libraries, and since these specs are derived from TEI, it makes sense to fold that experience back into the TEI as a specification that the TEI itself maintains and promulgates.

Exercising this benefit of membership should also produce more cost-effective digitization services for grant-funded projects and produce results of higher quality than small projects are now able to do with student or other in-house labor. And while Google Books and the Open Content Alliance are obviously major features of the digitization landscape today, both of these projects depend OCR, and the underlying text transcription produced by OCR is not good enough for applications that require analysis of the machine-readable text or display that text (rather than a page image) for browsing. In any case, Google Books limits the distribution of its source materials to the libraries from whose holding they were produced, and there are many libraries and projects, nationally and internationally, who do not participate in either of these projects.

In 2006, Perry Trolard, working under the supervision of John Unsworth, completed a draft of TEI Tite (for both the then-current fourth edition of the TEI Guidelines and for the then-forthcoming fifth edition), based on analysis and harmonization of the vendor specifications developed at the University of Virginia and the University of Michigan. TEI Tite has a number of features that are of specific value in the context of keyboarding, for example "convenience elements," which abbreviate tagging

keystrokes (from something like <hi rend='bold'></hi> to something like) and thus reduce costs for typographical highlighting in six cases: boldface, italics, underlines, superscript, subscript, and small-caps. In addition, TEI Tite excludes editorial or interpretive elements and attributes available in the TEI at large, such as <sic> to indicate editorial judgment of error in the original text: as noted above, clients rely on vendors for transcription only, so editorial or interpretive elements would be liabilities if included. TEI Tite also excludes tags that indicate interlinear insertion or deletion of material, because it is designed for print and not for manuscript material. It does provide tags that would allow the keyboarder to note difficulties in transcription, however.

The TEI has has a working group on TEI in Libraries, and membership of that working group represented a number of academic research libraries; they hosted some of the initial discussions out of which this project grew, and they more or less migrated over into the Digital Library Federation's Committee on TEI in Libraries that reviewed Perry Trolard's draft specification and provided advice and input into its final design. Next, it went to the technical council and the editors of the Text Encoding Initiative Consortium, and in October it was released as part of the fifth edition (P5) of the TEI Guidelines.   The full documentation of TEI Tite can be found on the TEI web site, under "Guidelines – Customization – Customizations Provided by the TEI Consortium," at http://www.tei-c.org/Guidelines/Customization/index.xml

Turning TEI Tite into a membership benefit:

Having developed the TEI Tite specification, what remains to be done is to negotiate a volume discount that is based on its use, and establish that discount as a benefit of membership in the TEI. In order to negotiate that discount, the TEI Consortium needs to be able to project the volume that it thinks it can provide, and to make that projection on the basis of something other than guesswork, we need to survey libraries, presses, and scholarly projects around the world to find out what pent-up demand exists, and at what price-point it might be released. John Unsworth has had some in-depth preliminary conversation with potential vendors about the prospect of such an arrangement—Value Chain, recommended by Michael Jensen (National Academies Press) and Apex, who has consistently sent someone to the TEI members meeting over the past five years). Both have expressed interest in working with us if we can estimate volume.

With the information from that survey and the follow-up calls, we will prepare an RFP, in order to get bids based on a uniform description of the work to be performed. Once we have bids, we also need to interview a smaller number of libraries, presses, and projects who have experience in working with keyboarding vendors, to get a better understanding of which vendors provide quality service. We will need to visit at least a couple of vendors to have some in-depth conversations about the options for working with them (for example, handling submitted material, quality assurance, production facilities, turnaround time, etc.) and at least in a couple of instances we should visit the vendor clients to look at what they send to vendors, what they get back, and what they are able to do with it, and to talk with them in more depth about their experience. Based on bids and visits, and in consultation with Peter Kaufman (formerly VP for strategic planning at Innodata) we will select a vendor and establish terms for keyboarding services. A key point in making that selection will be to balance the cost of the keyboarding service itself against TEI's cost for working with the vendor: for example, it stands to reason that if TEI takes on more of the work of aggregating materials, sorting them into like jobs, submitting those jobs to the vendor, and returning materials to libraries and scholarly projects, then the cost of the vendor's services will be lower than if the vendor takes on some or all of these

responsibilities. In effect, we will need to accept the bid that balances benefit to the TEI member and benefit to the TEI itself, bearing in mind that whatever cost the TEI incurs in offering the member benefit will have to be covered by increased income from membership fees. These are decisions that require the involvement of the TEI executive, who will be represented by the Chair of the Board, Daniel O'Donnell.

Once a vendor has been selected and terms established, the remaining work will be to make the community aware of the opportunity to realize savings on keyboarding by becoming a member of the Text Encoding Initiative Consortium and adhering to the TEI Tite specification. While raising that awareness will necessarily be an ongoing effort in the TEI, we can begin by mailing information to major academic research libraries worldwide, by disseminating the information online (in appropriately targeted email lists, blogs, wikis, etc.), and by procuring a small amount of print advertising (calculated to reach certain decision-makers who might not read direct mail or email lists, etc.).   We believe that there are many more than 81 institutions worldwide that could and should be members of the TEI Consortium, and our goal in the marketing component of this campaign will be to double membership in year or two immediately following the completion of the project. If we accomplish that, the proposed investment of $30,000 by the Andrew W. Mellon Foundation will produce an ongoing increase in income to the TEI on the order of $100,000 a year.

We expect the work described in this proposal to be complete within calendar year 2008. Ongoing management of the TEI Tite specification will become part of the work of the TEI Council, which also maintains the Guidelines as a whole and one other widely-used subset, TEI Lite (which is what most libraries transform their vendor-produced texts into, for long-term storage and distribution).

Project Personnel and Their Roles:

Carole Palmer, Director of the Center for Informatics Research in Science and Scholarship (in the Graduate School of Library and Information Science at the University of Illinois, Urbana-Champaign), will oversee the survey component of this project. The staff of this Center (formerly the Library Research Center) have considerable experience with designing and carrying out survey research, including some that has been funded by the Andrew W. Mellon Foundation (e.g., "The Book as Gold Standard" in 2003, supervised by former Center director Leigh Estabrook).

John Unsworth, with advice and consulting from Peter Kaufman, and in cooperation with Daniel O'Donnell, will handle vendor negotiations, once Palmer's survey is complete. Unsworth, Dean of the Graduate School of Library and Information Science at the University of Illinois, Urbana-Champaign, was responsible for incorporating the TEI Consortium in 2000, and has served as chair of its executive board and chair of its technical council.   Developing TEI Tite as a tangible benefit of membership is a project that he has promoted within the TEI, and he supervised Perry Trolard's work in developing the specification.   He is also co-principal investigator in the MONK project, a Mellon-funded project that applies text-mining to literary texts in digital libraries (itself an example of an application for which high-quality machine-readable texts are required).

Daniel O'Donnell is Chair of the English Department at Lethbridge University in Canada; he is also Chair of the Board of the TEI Consortium through calendar year 2009. He is also founding director of the Digital Medievalist Project (http://www.digitalmedievalist.org/).   He has been an elected board member of the TEI Board since 2006, and Chair of the Board since 2007. He is also an advisory board

member at Readex. Before his academic career, he also had work experience in marketing. He will be working with Unsworth and Kaufman on negotiating with vendors, with Unsworth on shaping the nature of the membership benefit, and with Trolard on the marketing campaign.

Peter Kaufman will provide consulting on the design of, and responses to, a request for proposals from vendors of keyboarding services. Kaufman, now an independent media producer in New York, is a former vice president at Innodata-Isogen, a company that does large-scale data conversion (including keyboarding services); in recent years he has done considerable work in the cultural heritage sector, including service on the Commission on Cyberinfrastructure for Humanities and Social Sciences (organized by the American Council of Learned Societies and funded by the Andrew W. Mellon Foundation). He is also co-author of a report entitled "Good Terms: Improving Commercial-Noncommercial Partnerships for Mass Digitization" prepared for OCLC Programs and Research and published (in November/December 2007) in D-Lib Magazine.

Perry Trolard will be responsible for marketing the member benefit once negotiations with vendors have been concluded. Trolard is assistant director of the Humanities Digital Workshop at Washington University in St. Louis, and the author of the TEI Tite specification. In the course of developing that specification, Trolard—whose educational background is in Library and Information Science and in English—established relations with the digital library community as represented in library staff, in the Digital Library Federation, and in the TEI community. He will work with all of these communities, and with additional contacts provided by them, to design and carry out a campaign to bring TEI Tite to the attention of those who might benefit from it and to encourage their participation as members of the TEI Consortium.

Curricula Vitae for these four project members are attached.

Budget Notes:

A budget for this project is attached and explanations for individual items are included on the budget sheet. Five years of financial statements for TEI are also attached: the TEI Consortium's accounting and auditing is provided by KPMG, and its funds are held in an interest-bearing checking account with the Bank of America. Daniel O'Donnell (daniel.odonnell@uleth.ca) is the Principal Investigator and also Chair of the executive board of the TEI Consortium, and is listed on the cover sheet as the signing official for the TEI. TEI Funds are managed by the treasurer, Daniel Pitti, and his contact address is listed as c/o for the PI, for that reason. Funds will be deposited in an interest-bearing account, with interest re-invested in the project.

TEI Tite Project Budget:

Survey Research

    Personnel:

Project Manager	@ 5%	3 months	$625.00	
Project Coordinator	@ 25%	3 months	$2,500.00	
Data Analyst	@ 35%	3 months	$3,500.00	
Quality assurance	@ $8/hour	20 hours	$160.00	
Support/Follow-up	@ $8/hour	40 hours	$320.00	
			$7,105.00	(160 calls at 15 min/each; 20% of calls international, @ $0.50/minute)

    Benefits:

Retirement	$712.19
Health/Life/Dental	$1,476.71
Termination	$65.59
Medicare	$96.06
Worker's Comp	$9.24
	$2,359.79

    Expenses:

Supplies & Equipment	$100.00	
Software	$300.00	
Printing	$50.00	
Phones	$374.00	
Computing Services	$525.00	(.1625 Project FTE * $3,233 GSLIS Rate)
	$1,349.00	

    Survey Direct Costs: **$10,813.79**

Consulting:

Unsworth (vendor negotiations)	@ $500/day	5 days	$5,000.00	(2 days converting survey results into estimates of volume for vendor bids; 1 day preparing RFP for vendors; 1 day evaluating bids; 1 day visiting vendors;)
O'Donnell (vendor negotiations)	@ $500/day	5 days	$5,000.00	(1 day preparing RFP for vendors; 1 day evaluating bids; 1 day visiting vendors; 2 days working with Trolard on marketing results of the process)
Trolard (marketing)	@ $500/day	10 days	$5,000.00	(5 days preparing direct mail campaign; 3 days preparing online campaign; 2 days vendor client visits)

	Kaufman	@ $500/day	2 days	$1,000.00	(1 day consulting on preparation of vendor RFP; 1 day consulting on bids submitted)
	Consulting costs:			**$16,000.00**	
Marketing:	2,000 postcards designed, printed & mailed		@ $1.00 each	$2,000.00	(based on domestic and international mailing, buyerzone.com)
	Chronicle Ad 1/5 page	run in two issues	@$1,455	$2,910.00	(same design for postcards, print ad, square banner)
	Marketing costs:			**$4,910.00**	
Travel:	two trips to visit vendors	estimated	@ $1,000 each	$2,000.00	(airfare $500/trip, lodging $300/trip, expenses $200/trip)
	two trips to visit vendor clients	estimated	@ $1,000 each	$2,000.00	(airfare $500/trip, lodging $300/trip, expenses $200/trip)
	Travel costs:			**$4,000.00**	
Total Costs:				**$35,723.79**	

Peter B. Kaufman
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Employment:

Intelligent Television, New York. President, Chief Executive Officer, and Executive Producer, 2004-present. Established and directs all business and editorial aspects of new nonfiction production, research, and consulting enterprise based in New York and Washington. Intelligent Television produces nonfiction television and video programming in close association with libraries, museums, archives including the American Antiquarian Society, Columbia University, the Library of Congress, MIT, the University of California-Berkeley, the University of Southern California, and the University of Virginia. The company sponsors and conducts research projects on media and education in the digital age, supported by foundations and government agencies. The company provides strategic planning/consulting services to commercial enterprises and noncommercial institutions. Intelligent Television's productions and research projects focus on making educational and cultural material more widely accessible worldwide.

Motion Picture/Broadcast/Recorded Sound Division, Library of Congress, Washington, DC. Expert consultant, 2006-present. Advises the Library on new access strategies for the world's largest archive of moving images and recorded sound.

World Policy Institute, New School University, New York. Senior Fellow, Media and International Affairs, 1990-present. Oversees lectures on media and international affairs for prestigious policy think-tank. Member, Editorial Board, *World Policy Journal*.

Center for New Media Teaching and Learning, Columbia University. Associate Director, 2006-2007. One-year appointment, funded by the Hewlett Foundation, to direct the Center's research on the future use of video and television in higher education.

Innodata Isogen, Hackensack. Director of Strategic Initiatives, 2001-2004. Developed and directed business relationships and partnerships with libraries, museums, and archives for the world's largest digitization service provider. Clients included Barnes & Noble, Columbia, Harvard, the University of Illinois, and the Smithsonian Institution.

TV Books, New York. President and Publisher, 1994-2001. Established and directed operations of book publishing company. Published books and e-books accompanying top-rated and award-winning network, public, and cable television programs. Negotiated publishing rights deals with television networks and independent television producers, literary agents, and authors. Supervised editorial, design, production, sales, marketing, and business affairs. Published the work of leading historians, journalists, scientists, photographers, and television writers, critics, and producers worldwide. Negotiated

distribution agreements with Simon & Schuster, HarperCollins, and Penguin Putnam, and rights deals with Microsoft, Adobe, *TV Guide*, and others. Secured financing agreements with individual and corporate shareholders and sale of the business to Broadway Video, the television and film company of "Saturday Night Live" producer Lorne Michaels.

PUBWATCH Inc, New York. President and Executive Director, 1990-1994.
Established and directed nonprofit organization to promote and coordinate Western assistance to the book industries damaged by totalitarianism in Central and Eastern Europe, the Baltic States, and the former Soviet Union. Designed, sponsored, and conducted education seminars and workshops in these countries for publishing professionals and education and culture policymakers. Professional, philanthropic, and governmental partners included the American Booksellers Association, the Association of American Publishers, the Council of Europe, the Library of Congress, the British Publishers Association, France Edition, and the Frankfurt Book Fair. Raised financing from the Soros Foundations, the Andrew W. Mellon Foundation, the Rockefeller Family & Associates, the Miriam and Ira D. Wallach Foundation, the U.S. Information Agency, the World Bank, and the British Council.

Institute for EastWest Studies, New York. Director of Publications, 1986-1990.
Established publishing program on international-affairs subjects for leading nonprofit policy institute devoted to ending the Cold War. Established publishing relationships with Macmillan, St. Martin's Press, Westview Press, Oxford University Press, and Duke University Press, among others. Publications won national and international attention.

Memberships: American Council on Learned Societies Commission on Cyberinfrastructure in the Humanities and Social Sciences; American Historical Association; Cornell University Libraries Advisory Council; Association of Moving Image Archivists; One Laptop per Child (Video Curator); Social Science Research Council Digital Cultural Institutions Project; University of Virginia Media Studies Program Advisory Board.

Publications: *Spacebridges: Television and U.S.-Soviet Dialogue.* Articles in *Publishers Weekly*, *Scholarly Publishing*, *The New York Times*, *The Nation*, *Information Outlook*, *First Monday*, *Slavic Review, The Times Literary Supplement*, and *International Book Publishing: An Encyclopedia.*

Education: Columbia University, School of International and Public Affairs and W. Averell Harriman Institute for Advanced Study of the Soviet Union. 1984-1986. **Cornell University**, Arts and Sciences. 1980-1984. Cum Laude, College Scholar.

Languages: Russian; French.

Personal: Married: one wife, three children.

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URL: http://home.uleth.ca/~daniel.odonnell/

Current Positions:

Associate Professor of English (Tenured), University of Lethbridge. July 1, 2002-.

Department Chair, Department of English, University of Lethbridge. November 1, 2005-. The Department of English has a Budget of approximately $1.4 million (CAD).

Chair and CEO, Text Encoding Initiative (http://www.tei-c.org). October 30, 2006-. The TEI has a budget of approximately $120,000 (USD).

Founding Director, Digital Medievalist Project (http://www.digitalmedievalist.org/). 2002-. The Digital Medievalist is grant funded. Its most recent grant was for approximately $28,000 (CAD).

University Education:

Degree Courses

    Ph.D. (1996). Yale University, Department of English.
    M.A. (1991). Yale University, Department of English.
    B.A. with Distinction (1989). St. Michael's College, University of Toronto.
    (*English Literature with minors in Medieval Latin and Celtic Studies*.)

Misc. non-credit and language courses:

    Old Frisian. Rijksuniversiteit Leiden (January-June, 1993).
    Modern Irish. University College Galway (July-August, 1990 and 1991).
    Old Irish. University College Galway (August 1990).
    French. Université du Québec à Chicoutimi (Summer, 1987).

Dissertation:

Manuscript Variation in Multiple-Recension Old English Poetic Texts: The Technical Problem and Poetical Art.

A comprehensive analysis of textual variation in all Old English poetry surviving in more than one manuscript. The thesis provides a new analysis of the variation found in these poems and argues that manuscript context was a major factor in determining the extent and type of variation a given poem exhibits.

Supervisor: Fred C. Robinson, Yale University, Department of English.

Reviewed: *Linguistica e Filologia* 9 (1999): 156.

Publications:

Book

Cædmon's Hymn: A Multimedia Study, Edition and Archive. SEENET A.7 (Cambridge: D.S. Brewer, 2005). xxii + 261 pp. + CD-ROM.

A study and critical edition of the first recorded Old English poem. The introduction examines Cædmon's poetry and the Cædmon story in a variety of literary, historical, and social contexts. Chapters: "Bede and Caedmon"; "Sources and Analogues"; "Caedmon's Hymn and Germanic Convention"; "Manuscripts"; "Filiation and Transmission"; "Language"; "Editorial Introductions"; "The Dating of M and P"; "Caedmon's Hymn and Bede's Paraphrase"; "Numerical and Geometric Patterning in Caedmon's Hymn"; "Memorial Performance, Transitional Literacy, and the Transmission of Caedmon's Hymn"; "Index of Proposed Analogues to the Caedmon Story"; "Critical Editions"; "Witness Archive"; "Glossary".

Articles and Chapters

"The Ghost in the Machine: Revisiting an Old Model for the Dynamic Generation of Digital Editions." *HumanIT* 8.1 (2005): 51-71. Commissioned reprint (with retrospective introduction) of my 1998 webpage, "The Electronic Cædmon's Hymn: Editorial Method."

"O Captain! My Captain! Using technology to guide readers through an electronic edition." [Column]. *Heroic Age* 8 (2005). [http://www.heroicage.org/issues/8/em.html]

"The Digital Medievalist Project," *Old English Newsletter*. 37 (*Fall* 2004): 19-21.

"Bede's Strategy in Paraphrasing *Cædmon's Hymn*." *JEGP* 103 (2004): 417-433.

"The Doomsday Machine, or, 'If you build it, will they still come ten years from now?': What Medievalists working in digital media can do to ensure the longevity of their research." [Column]. *Heroic Age* 7 (2004). [http://www.heroicage.org/issues/7/ecolumn.html]

"Numeric and Geometric Patterning in *Cædmon's Hymn*." *ANQ* 17 (2004). 3-12.

"'Pioneers! O Pioneers!': Some Electronic Editing Do's and Don'ts from Stijn Streuvels's *De teleurgang van den Waterhoek*" [Refereed Review Article]. *Literary and Linguistic Computing* (Forthcoming Spring, 2003).

"Junius's Knowledge of the Old English Poem *Durham*." *Anglo-Saxon England* 30 (2002). 231-245.

"The Accuracy of the St. Petersburg Bede." *Notes and Queries* 247 (2002): 4-6.

"Fish and Fowl: Generic Expectations and the Relationship between the Old English *Phoenix* poem and Lactantius's *de ave phoenice*." In: *Germanic Texts and Latin Models: Medieval Reconstructions*. Ed. K.E. Olsen, A. Harbus and T. Hofstra. Germania Latina IV. Mediaevalia Groningana, n.s. 2. Leuven, Paris and Sterling, VA: Peeters, 2001. 157- 71.

"*Hædre* and *Hædre Gehogode* (*Solomon and Saturn* line 62b and *Resignation* line 63a)." *Notes and Queries* 244 (1999). 312-316.

"The Spirit and the Letter: Literary Embellishment in Old Frisian Legal Texts." *Amsterdamer Beiträge zur älteren Germanistik* 49 (1998): 245-256.

"A Northumbrian Version of 'Cædmon's Hymn' (*eordu*-recension) in Brussels Bibliothèque Royale Manuscript 8245-57 ff.62r^2-v^1: Identification, Edition, and Filiation." In: *Beda Venerabilis: Historian, Monk and Northumbrian*. Edited by L.A.R.J. Houwen and A.A. MacDonald. Groningen: Egbert Forsten, 1996. 139-166.

"Schoolbook Design in the Fifteenth Century." *The Yale University Library Gazette* 70 (1995). 23- 38.

"The Collective Sense of Concrete Singular Nouns in *Beowulf*: Emendations of Sense." *Neuphilologische Mitteilungen* 92 (1991). 433-440.

Commercial Working Papers

"Why should *I* write for *your* Wiki." Readex Community Academic Advisor Board. April 21, 2006.

"An Undocumented Method of Filtering and Translating Structural SGML to HTML using Citec Multidoc Pro Style Sheets." Citec. 1999.

Encyclopedia Entries

"Cædmon." *Sources of Anglo-Saxon Literary Culture*, Volume C (Western Michigan University Press, Forthcoming).

"Cædmon." *Wikipedia*. Featured article, June 2006-. This article was published on the front page of the Wikipedia on July 7, 2006. Approximately one in 10,000 articles receive feature status.

Journalism

My work on Cædmon's Hymn and for the TEI was the subject of an interview on the CBC Radio One programme "Wild Rose Country," December 21, 2006.

"More Research Money Needed For Social Science & Humanities." [radio broadcast]. *Commentary*. CBC Radio One. Broadcast March 15, 2004. Transcript and recording available at: <http://www.cbc.ca/insite/COMMENTARY/2004/3/15.html>

My teaching on media was the focus of a *Lethbridge Herald* story on media/military relations in Gulf War. "Iraq War More Balanced than 1991: Prof." *Lethbridge Herald*, April 3, 2003.

"Restoring Pages to a Sacred Text [The Diary of Anne Frank]." *The Globe and Mail*. Tuesday November 17, 1998. Arts and Leisure, pp. A17-A18.

Reviews

Donald Scragg and Carole Weinberg, eds. *Literary Appropriations of the Anglo-Saxons from the Thirteenth to the Twentieth Centuries* (Cambridge Studies in Anglo-Saxon England, 29). *Early Medieval Europe* 11.2 (2002).

Timothy Graham, ed. *The Recovery of Old English: Anglo-Saxon Studies in the Sixteenth and Seventeenth Centuries* (Publications of the Richard Rawlinson Center). *Early Medieval Europe* 11.1 (2002): 93-95.

Hal Momma, *The Composition of Old English Poetry* (Cambridge Studies in Anglo-Saxon England, 20). *Early Medieval Europe* 8.1 (1999): 163-166.

Lectures

"We are family: the economics of best practice." TEI Members Meeting, Victoria BC. October 27, 2006.

"How Digital must a digital edition be?" 41st Internation Congress on Medieval Studies. University of Western Michigan. May 7, 2006.

"Why should *I* write for *your* Wiki." Renaissance Society of America. San Francisco. March, 2006.

"Using Electronic Media to Improve Efficiency and Intelligibility in Teaching and Researching the Middle Ages" [Satirical lecture]. Societas Fontibus Historiæ medii Aevii Inveniendis, vulgo dicta "The Pseudo Society". 40th International Congress on Medieval Studies, Western Michigan University (Kalamazoo), May 7, 2005.

"Back to the future: what electronic editors can learn from print editions of texts in multiple versions." European Society for Textual Studies Conference. Alicante, Spain. November 24-25, 2004.

"Best Practice in the Production of Digital Resources for Medievalists: Theory and Application". Thirty-ninth International Congress on Medieval Studies (Kalamazoo). May, 2004.

"Best Practice in the Production of Digital Resources for Medievalists: Project Design, Management, and Implementation". Thirty-ninth International Congress on Medieval Studies (Kalamazoo). May, 2004.

"Now What?: The Digital Medievalist Project and the Discovery of Best Practice." Invited Lecture. SSHRC/University of Calgary ITST Summer Institute. May 26, 2004.

"The Electronic Cædmon's Hymn: A Single Scholar, Multiple Text Electronic Edition and Archive." Invited Lecture. SSHRC/University of Saskatchewan ITST Conference, May 15, 2004.

"The Text Encoding Initiative: A Theoretical Standard for the Encoding of Electronic Texts." Invited Lecture. SSHRC/University of Saskatchewan ITST Conference, May 15, 2004.

"Poetry, Prose, and Book History: A way forward in debates about scribal literacy in Anglo-Saxon England?" Poetry and Prose: Intersections (to 1100): Methods and Approaches (Organisers: Carin Ruff and Elizabeth M. Tyler). Thirty-ninth International Congress on Medieval Studies (Kalamazoo). May 8, 2004.

"Texts and the Single Scholar: Is the morning after worth the night before?" [Lecture on electronic project management]. Thirty-eighth International Congress on Medieval Studies (Kalamazoo). May 8, 2003.

"Vade retro me Satana": What the Norton Anthology of Poetry gets Wrong on Page 1." Department of English Colloquium series. University of Lethbridge. November 28, 2002.

"The Cædmon Code: Some Problems with Numerical and Geometrical Patterning in an Early Medieval Text." Working Papers in the Humanities Colloquium. University of Lethbridge. April 4, 2002.

"'Is that your final answer?' Reconstructing *Cædmon's Hymn* in a Post-Modern Age." Germanic Philology Session, MLA Annual Meeting. Washington D.C., December 27, 2000. Also delivered the Department of English Research Colloquium, January, 2001.

"Text and Context: Generic Factors affecting Scribal Performance in the Transmission of Old English Verse." Department of English Research Colloquium. University of Lethbridge. November 15, 2000.

"The Editor Function, or I Know More about *Cædmon's Hymn* than you do, Nyah, Nyah!" Inaugural Lecture, Humanities Computing Series, University of Calgary, June 15, 2000.

"Reading Bede Reading Cædmon: Understanding a Critical Miracle." Thirty-fifth International Congress on Medieval Studies (Kalamazoo). May 8, 2000. *This was a thoroughly revised and abridged version of my March 1999 Departmental lecture and April 2000 lecture at Queen's.*

"Reading Bede Reading Cædmon: Bede's *Historia ecclesiastica* as Source and Source of Interpretation for *Cædmon's Hymn*." Invited Lecture. Department of English, Queen's University. April 10, 2000.

"The Editor Function: Form, Content, and Editorial Theory in Editing *Cædmon's Hymn*." Department of English Research Colloquium. University of Lethbridge. February 2, 2000. *This was a revised version of my May 9, 1999 invited lecture at the Kalamazoo Medieval Studies Conference.*

"The Editor Function: Form, Content, and Editorial Theory in Editing *Cædmon's Hymn*." Commissioned Lecture. Thirty-fourth International Congress on Medieval Studies (Kalamazoo). May 9, 1999.

"Reading Bede Reading Cædmon: Bede's *Historia ecclesiastica* as Source and Source of Interpretation for *Cædmon's Hymn*." Department of English Research Colloquium. University of Lethbridge. March 1999. *A lightly revised version of this paper was delivered as an invited lecture, April 10, 2000* at *Queen's University.*

"Fish and Fowl: Generic Expectations and the Relationship between the Old English *Phoenix* poem and Lactantius's *de ave phoenice*." *Germania Latina IV*. Groningen, The Netherlands, July 1998.

"What Anne Meant: Generic Instability and the Transmission of Anne Frank's *Diary*." Department of English Research Colloquium. University of Lethbridge. March 1998.

"A New Theory of Poetic Textual Transmission." Delivered at: "Anglo-Saxon Studies in the Twentieth Century." International Society of Anglo-Saxonists Conference (Palermo, Italy). July 11, 1997.

"The Text of Cædmon's Hymns." Delivered at: "Focusing on Editorial Scholarship at the Century's End." MLA Convention, Washington D.C. December 28, 1996.

"'Transitional Literacy' and the Poems of the *Anglo-Saxon Chronicle*: Context as Counter-evidence." Medieval Chronicle Conference. Rijksuniversiteit Utrecht/Driebergen. July 13, 1996.

"Ends and Means: Manuscript Context and Scribal Accuracy in the Copying of Anglo-Saxon Poetry." Invited Lecture. Department of English, Trinity College Dublin. March 19, 1996.

"The Spirit and the Letter: The Use of the Dramatic in Old Frisian Legal Writing." Twenty-ninth International Congress on Medieval Studies (Kalamazoo). May 4, 1994.

"Beinecke MS 594: A Second Look at a Well-Known Nominale." Early Book Society Conference. Trinity College Dublin. 1991.

"The OE 'Phoenix', Lactantius's 'De ave phoenice' and the Science of Allegory," Harvard-Yale Graduate Student Colloquium. 1991.

General Interest and Undergraduate Lectures

"The Importance of Being Earnest: Coding Problems and Solutions." Invited Guest Lecture, English 517/607 (Graduate Humanities Computing), University of Calgary. June 15, 2000.

"Tolkien's Elvish and Other Constructed Languages." Invited Lecture, English 3700 (Children's Literature), University of Lethbridge. February 7, 2000.

"Anne, Otto, and the Neo-Nazis. The (Im)morality of Reading a Holocaust Diary." Invited Lecture, Arts and Science 1000 (Liberal Arts), University of Lethbridge. November 2001; September 2000; November, 1999.

"What Anne Meant: Generic Instability and the Transmission of Anne Frank's *Diary*." Invited Lecture, Arts and Science 1000 (Liberal Arts), University of Lethbridge. November 2001; September 2000; November, 1999.

"*Beowulf* and its Place in History." Worker's Educational Association Weekend School at Horncastle. February, 1997.

Posters

"Medieval Manuscripts." Agnes Davidson School. March 2006.

"The Digital Medievalist Project: An Experiment in Digital Community." Digital Philology and Medieval Texts. Arizzo, January 19-21, 2006.

"*Digital Medievalist*: The Scholarly Journal as Community of Practice." MLA Convention. December 27-29, 2005. Washington D.C.

"TEI/XML as a Production Language: The Case of the Digital Medievalist Project." TEI Annual Meeting. Sofia, Bulgaria. October 28-29, 2005.

"The Digital Medievalist Project: An Extensible Community of Practice for Medievalists." *Poster and abstract at* Digital Resources in the Humanities Conference. University of Newcastle upon Tyne, UK. September 5-9, 2004. [**3rd Prize winner in best poster competition (out of 22 entries)].**

Broadcasts and Dramatic Productions:

Actor in *Homo*, a Latin play produced by the medieval drama troupe, *Poculi Ludisque Societas* (Centre for Medieval Studies, University of Toronto); performed at the conference of the International Association for Neo-Latin Studies, Toronto, 1988.

Editor, Producer, and Technician for "Within the Hollow Crown: A Sad Tale of the Death of Kings." A Radio Adaptation of William Shakespeare's *Richard II* and *Henry IV* parts 1 and 2. Adapted for Radio and Produced by Dan O'Donnell. Directed by Ralph Joneikeiss. Technical Production, Dan O'Donnell. Broadcast on CIUT-FM (Toronto), March 22 and April 5, 1987.

Current Major Projects:

***The Visionary Cross in Anglo-Saxon England* (Provisional Title).**

Co-Director (with Catherine Karkov, and Roberto Rosselli del Turco). An edition of the Anglo-Saxon Visionary Cross trope. The project will contain electronic editions of the Ruthwell Cross, Bewcastle Cross, Brussels Cross, and Vercelli Book *Dream of the Rood* poem.

Funding: Proof-of-Concept completed. SSHRC $250,000 (Applied for); NEH $200,000 (USD) (applied for). University of Lethbridge Research Fund $4500 (awarded); Gettysberg College, $10,000 (USD) (awarded).

Refereeing

External Reviewer, SSHRC Research Cluster Programme (2006-).

Editor, *Digital Medievalist* (2005-)

Peer Reviewer, *Heroic Age* (2002-).

Peer Reviewer, *Digital Humanities Quarterly* (2005-).

Peer Reviewer, *Literary and Linguistic Computing* (2002-).

Peer Reviewer, Nelson Thompson College Texts (2002).

Peer Reviewer, *Extreme Markup* (2001).

Peer Reviewer, nupedia.com, the Internet Encyclopedia (2001-2003)

Peer Reviewer, University of West Virginia Press (2000-).

External reviewer, Council For Innovation (CFI), Major Infrastructure Grants [Electronic Document and Database Projects] (1999).

Consulting

Kawoosh! Productions/Stargate SG-1 [Television Producers]. Advice on historical language use and pronunciation for a Fall 1999 episode of the Television Series "Stargate SG1" (April-May 1999).

Current and Successful Grants, Fellowships, and Prizes:

2006	SSHRC SRG ($249, 500) (Applied for)
2006	SSHRC ITST ($49,960) (4A-Status)[*]
2005	SSHRC ITST ($27,490)
2005	University of Lethbridge Travel Grant ($1000)
2004	Gettysburg College ($10,000 USD). Shared award
2004	CRDC ($6000) (In kind)
2004	University of Lethbridge Research Fund ($4500)

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[*]4-A is a status that the Social Sciences and Humanities Research Council assigns to applications that are considered "recommended but not funded"—approved but unfunded due to bugetary constraints.

2004	University of Lethbridge Travel Grant ($1000)
2003	Faculty of Arts and Science ($3000)
2003	University of Lethbridge Travel Grant ($1000)
2002	University of Lethbridge Travel Grant ($1000)
2002	University of Lethbridge Research Enhancement Award (Course Relief)
2001	SSHRC Major Projects Grant (for P. K. Page Project)
2001	SSHRC Student Research Stipend ($2900)
2001	STEP Research Assistant Funding ($3000)
2000	University of Lethbridge Travel Grant ($900)
2000	University of Lethbridge RGILS Award ($3800)
2000	SSHRC Special One Time Research Grant [student assistance] ($4500)
2000	University of Lethbridge Travel Grant ($900)
1999	SCP Research Assistant Funding ($3600)
1999	University of Lethbridge Travel Grant ($800)
1998	University of Lethbridge Travel Grant ($800)
1997-1998	Province of Alberta Research Excellence Envelope Funding ($4800)
1997-1998	University of Lethbridge Research Fund ($4500)
1997-1998	University of Lethbridge 'Internal SHRCC' ($4000)
1997	University of Lethbridge Travel Grant ($800)
1993-1994	Mellon Fellowship in the Humanities: Dissertation Fellowship
1991-1994	Social Sciences and Humanities Research Council of Canada, Doctoral Fellowship (3 awards)
1989-1993	Yale University Fellowship
1989-1993	University of California Los Angeles, University Fellowship (declined)
1989-1991	Mellon Fellowship in the Humanities
1988-1989	St. Michael's College, University of Toronto, C.L. Burton In-course Scholarship
1987-1988	St. Michael's College, University of Toronto, In-course Scholarship

Academic Employment:

2002-	Associate Professor (Tenured), Department of English, University of Lethbridge, Canada.
1997-2002	Assistant Professor (Tenure Track), Department of English, University of Lethbridge, Canada.
1997	Tutor, Worker's Educational Association Weekend School at Horncastle, Feb. 14-16, 1997.
1997	Tutor, Department of English, The University of York, and York, England.
1994-1995	Visiting Assistant Professor, Department of English, Louisiana State University and Agricultural and Mechanical College, Baton Rouge, Louisiana, USA.
1991-1992	Teaching Fellow, Department of English, Yale University, New Haven, Connecticut, USA.

Administrative Experience:

International

Founding Director and Editor, Digital Medievalist Project [Online community of practice and peer-reviewed journal]. 2002-.

Advistory Board Member, Readex. 2006-.

Chair and CEO, Text Encoding Initiative. 2007-.

Elected Board Member, Text Encoding Initiative. 2006-.

Board Member, *Digital Humanities Quarterly.* 2005-.

Editorial Board Member, *Heroic Age* [Online peer-reviewed journal]. 2004-.

National

Canadian Chairs of English. 2006-. I am responsible for the job survey and have arranged for the production of a new website.

Social Science and Humanities Research Council (SSHRC). University Representative. 2003-2005. This was a Vice Presidential-level role at most Universities and involved over seeing a budget of $10,000/6 months. I was appointed by the University President.

University

MA/MSc Programme Committee. 2005-2007.

General Faculties Council. 2001-2004. While on this committee I wrote the University's computer use policy.

Chief Librarian Search Committee. 2002-2003.

VP Research Appointment Committee. 2004.

Graduate School Council. 2001-.

Faculty of Arts and Science

Chair, Committee on Research and Teaching. 2005-2006.

STP committee. General Education. 2005-2006.

Search (Modern Languages). External Member. 2005-2006.

Executive Committee. 2002-2004.

Working Papers in the Humanities Colloquium Series. Chair. 2002-2004.

SSHRC Committee. Chair. 2000-2001.

SSHRC Committee. 1999-2001.

Grade Appeals Committee Faculty Representative. (several times).

Departmental Service

(In alphabetical order. Most of this service has been on multiple occasions).

Acting Chair.

Activities Committee (Chair).

Search Committee (Chair).

Curriculum Committee.

Department Chair.

Department Representative. Inter-Campus Retreat.

Graduate School Information Session Speaker.

Library Representative.

New Student Orientation Speaker.

Search Committee (Chair).

STP Committee.

Faculty Association

Economic Benefits. 2004-2005.

Nominating Committee. Past Chair. 2001-2002

Nominating Committee. Chair. 2000-2001.

Ad hoc Constituency Committee. 2002. Redesigned Structure for all Faculty Association Committees.

Miscellaneous

Participant

Mentor for young scholars. *Literary and Linguistic Computing*. (2002-2003).

Chair

Graduate Student Colloquium in Medieval Studies at Yale. 1991-1992. Established bi-weekly series of work-in-progress papers and seminars by graduate students in English and Medieval Studies at Yale.

Teaching Experience *(I proposed or significantly revised all courses marked by an asterisk).*

Graduate

Louisiana State University

Beowulf. 1995.
Old English. 1994.

University of Lethbridge

M.A. Co-Director. Tania Bigthroat. 2005-

MSc. Co-Director. Angela Mylarski (Math and Computer Science). Text Summation in Digital Libraries. 2004-2006.

M.A. Director. Shelley Stigter. Double-Voice and Double Consciousness in Native American Verbal Art (English). 2004-2006.

M.A. Committee Member, Laura Cappello (English). 2002-2004

Undergraduate.

University of Lethbridge

Independent Projects

English 4990: *Lolita* and Ethical Criticism. 2000 (Asia Nelson).
English 3990: Orality, Literacy, and Post-Literacy. 2000 (Megan Fowke).
English 3990: Anne Frank's Diary and Book History. 2000 (Catherine Larsen).
*Management 4990: Document Management. Faculty of Management. 1999. (Jon Lane).
English 3990: Old English. 1998. (Vicky Budarov)

Scheduled Courses

*English 4400: Old English Poetry. 2002.
*English 4400: History of the Book Seminar: Context and Meaning. 2001, 1999.
English 3901: History of English. 1999.
*English 3850 (series): Introduction to Old English. 1998.
*English 3700 (series): Reading Practice in Old English. 2001 (*Beowulf* [two sections]).
*English 3450: Introduction to Old English. 2002, 2001, 2000. *In Fall 2000 this course had the largest enrolment in Old English in North America after the University of Toronto* (38 students) *according to a poll on Ansaxnet.*
English 3601: Chaucer. 1999, 1998.
*English 2900: World Englishes (Formerly "The English Language"). 2002, 2001 (twice), 2000 (twice), 1998.
*English 2810: Grammar. 2002.

English 2100: Fundamentals of Poetry. 2002, 2000, 1998, 1997.
English 1900: Introduction to English Literature and Language (Formerly "World of Words").
Three sections every two years, 1997-.

York University (England)

Middle English Period Paper (first year course). 1997.

> Louisiana State
>
> History of English. 1995.
> Chaucer: *The Canterbury Tales*. 1994.
>
> Yale University
>
> Modern British Fiction. 1992 (Course Lecturer: Lawrence Rainey).
> History of English. 1992 (Course Lecturer: Marie Borroff).
> The Age of Johnson. 1991 (Course Lecturer: Gordon Turnbull).
>
> Open Access Courses and Lectures:
>
> *Dark-Age Tales and the Contemporary Reader. WEA Weekend School. 1997.

Research Assistantship:

Dictionary of Old English Project, University of Toronto. May 1987-September 1989.

Professional Development

Participant. SGML Workshop. University of Calgary. Summer 1999.

Participant. Teaching with Corel Presentation. University of Lethbridge. Fall 1998.

Languages (in order of proficiency):

Classical and Medieval: Old English, Old Frisian, Latin, Old Norse, Old Irish, Gothic.

Modern: Dutch (fluent spoken and written), German, French, Modern Irish.

Computer: SGML/XML/XSLT/XHTML (advanced), CSS (advanced), Linux (advanced), Javascript (intermediate), PHP intermediate.

Referees:

Professor Peter Baker. Department of English, University of Virginia. Charlottesville, VA, 22906, USA. Tel. (804) 924-6651. Fax (804) 924-1478. E-mail: psb6m@virginia.edu.

Professor E.G. Stanley, Pembroke College, Oxford.

Professor Murray McGillivray. Department of English, University of Calgary, Calgary AB, T2N 1N4. Tel. (403) 220-3845. E-mail: mmcgilli@acs.ucalgary.ca.

Professor Emeritus Fred C. Robinson (Dissertation Supervisor). Yale University. P.O. Box 3545, Yale Station, New Haven CT, USA 06520. Tel. (203) 432-2259 or (902) 836-4385. Fax (203) 432-7066. E-mail: fred.robinson@yale.edu.

Professor Roberta Frank, Department of English, Yale University. P.O. Box 3545, Yale Station, New Haven CT, USA 06520. E-Mail: roberta.frank@yale.edu.

Professor John Woods, FRSC (Personal Reference). President Emeritus. University of Lethbridge. Lethbridge AB T1K 3M4. Tel. (403) 329-2378. Fax (403) 382-7191. E-mail: woods@uleth.ca.

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Associate Professor

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http://alexia.lis.uiuc.edu/~palmer/
[email: clpalmer@uiuc.edu](mailto:clpalmer@uiuc.edu)

Education
University of Illinois, Graduate School of Library and Information Science, Ph.D. 1996.
Vanderbilt University, George Peabody College, M.L.S. 1986.
Southern Illinois University, Department of Psychology, B.A. 1979.

Honors
Arnold O. Beckman Research Award, University of Illinois Campus Research Board, 2002.
Centennial Scholar Award, Graduate School of Library and Information Science, University of
   Illinois, 2001-2002.
University of Illinois List of Teachers Ranked Excellent by Their Students, Spring 2006, Fall & Spring 2005,
Spring 2003, Spring 2002, Fall 2001, Fall 2000, Fall 1998, Spring 1997 and Spring 1994.
Berner-Nash Award for outstanding doctoral dissertation, GSLIS, University of Illinois, 1996.
HEA Title IIB Fellowship, University of Illinois, 1994 and 1991.
Hostetter Scholarship in Library and Information Science, University of Illinois, 1992.
Beta Phi Mu membership, 1986.
Information Management Fellowship, Vanderbilt University, 1985.
University Highest Honors for B.A., Southern Illinois University, 1979.

Research Interests
Information technologies for scientific and scholarly work
Interdisciplinary scholarly communication and new digital forums
Information resources and services; impact of transition to digital resources
Social and cultural studies of knowledge; domain differentiation, interaction, and integration

Funded Research Projects
Principal Investigator, Intermediation Models for Institutional Repository Development, funded by the
Andrew W. Mellon Foundation, $49,000.

Co-Principal Investigator, Centuries of Knowledge. Institute of Museum and Library Services. P.I. Bryan
Heidorn, with CoPIs: Linda C. Smith and John Unsworth. $852,503.

Principal Investigator, A Graduate Program for Scientific Information Specialists: Getting Past the Prototype
in Biological Informatics. National Science Foundation, IIS/Collaborative Systems. August 2006- July 2009,
$249,189.

Co-Principal Investigator, IMLS Collection Registry & Metadata Repository. Institute of Museum and
Library Services. P.I. Tim Cole, with Co-PIs: Mike Twidale, Bill Mischo, and Nuala Bennett, 2002-2005 and
2006-2007, $839,303.

Principal Investigator, Electronic Journals in the Humanities: Patterns of Use and Measures of Impact. UIUC

Research Board. 2005-2006. $17,839.

Principal Investigator, Information Work and Discovery Potentials in Neuroscience Research. National Science Foundation, CISE/Digital Society and Technologies. August 2002- January 2006. $346,870.

Principal Investigator, Discovery in Neuroscience Research: The Role of Information in Practice. University of Illinois Campus Research Board, 2002-2003. $18,718.

Principal Investigator. The Information Needs and Information Environment of AIDS Patients: A National Survey. VHConcepts, Inc. 2002. $10,900.

Co-Principal Investigator, An Internet Environment for Biodiversity Survey Collaboration and Verification. National Science Foundation, Information Technology Research/Information Management. P.I.: Bryan Heidorn, with Co-PIs: Michael Jeffords, and Marylin Lisowski., January 2002-December 2004. $475,866.

Principal Investigator, The Information Environments of Humanities Scholars. Council on Library and Information Resources and the Digital Library Federation, 2000. $10,000.

Principal Investigator, Scholarly Work in the Humanities and the Evolving Information Environment: A Study of the Transition to Digital Full-Text Resources. Co-PI: William S. Brockman. University of Illinois Campus Research Board, 1999. $16,400.

Principal Investigator, Boundary Work in the Humanities: The Role of Information in Interdisciplinary Research. University of Illinois Campus Research Board, 1997-8. $6,250.

Principal Investigator, Margaret Atwood: A Reference Guide. Canadian Studies Faculty Research Grant, Canadian Embassy, 1988.

Principal Investigator, Margaret Atwood Bibliography Project. Southern Illinois University, Office of Research and Development, 1987-1988.

Publications
Palmer, Carole L., & Cragin, Melissa H. (forthcoming). Scholarly Information Work and Disciplinary Practices. *Annual Review of Information Science and Technology*.

Palmer, Carole L., Cragin, Melissa H., & Hogan, Timothy P. (in press). Weak Information Work in Scientific Discovery. *Information Processing and Management*.

Heidorn, P. Bryan, Palmer, Carole L., & Wright, Dan. (in press). Biological Information Specialists for Biological Informatics. *Journal of Biomedical Discovery and Collaboration*.

Palmer, Carole L., Heidorn, P. Bryan., Wright, Dan, & Cragin, Melissa H. (in press). Graduate Curriculum for Biological Information Specialists: A Key to Integration of Scale in Biology. *Lecture Notes in Computer Science*.

Palmer, Carole L., Knutson, Ellen, Twidale, Michael, & Zavalina, Oksana. (2006). Collection Definition in Federated Digital Resource Development. Proceedings of the 69th ASIS&T Annual Meeting, 3-8 November 2006, Austin, Texas. [Contributed paper].

Palmer, Carole. (2006). Weak Information Work and "Doable" Problems in Interdisciplinary Science. Proceedings of the 69th ASIS&T Annual Meeting, 3-8 November 2006, Austin, Texas. [Contributed paper].

Palmer, Carole L., Cragin, Melissa H., & Heidorn, Bryan P. (2006). Supporting Biological Information

Work: Research and Education for Digital Resources and Long-lived Data. Proceedings of the 6th ACM/IEEE-CS Joint Conference on Digital Libraries, p. 353.

Palmer, Carole L. (2005). Scholarly Work and the Shaping of Digital Access. *Journal of the American Society for Information Science* 56 (11), 1140-1153.

Shreeves, Sarah. L., Knutson, Ellen. M., Stvilia, Besiki., Palmer, Carole. L., Twidale, Michel. B., & Cole, Timothy (2005). Is 'Quality' Metadata 'Shareable' Metadata? The Implications of Local Metadata Practice on Federated Collections. In H.A. Thompson (Ed.) Proceedings of the Twelfth National Conference of the Association of College and Research Libraries, April 7-10 2005, Minneapolis, MN. Chicago, IL: Association of College and Research Libraries.

Hogan, Timothy P., & Palmer, Carole L. (2005). Information Preferences and Practices among People Living with HIV/AIDS: Results from a Nationwide Survey. *Journal of the Medical Library Association*, 93(4), 431-439.

Hogan, Timothy P., & Palmer, Carole L. (2005). "Information Work" and Chronic Illness: Interpreting Results from a Nationwide Survey of People Living with HIV/AIDS. Proceedings of the 68th ASIS&T Annual Meeting, 42, Charlotte, NC. [Contributed paper].

Palmer, Carole L., Melissa H. Cragin, & Timothy P. Hogan. (2004). Information at the Intersections of Discovery: Case Studies in Neuroscience. Proceedings of the 67th American Society for Information Science and Technology annual meeting, 41, 448-455.

Palmer, Carole L., & Knutson Ellen. (2004). Metadata Practices and Implications for Federated Collections. Proceedings of the 67th American Society for Information Science and Technology annual meeting, 41, 456-462.

Palmer, Carole L. (2004). Thematic Research Collections. *Companion to Digital Humanities*, edited by Susan Schreibman, Ray Siemens, and John Unsworth. Oxford: Blackwell, pp. 348-365.

Palmer, Carole L., Melissa H. Cragin, & Timothy P. Hogan. (2003). Information and Discovery in Neuroscience. Proceedings of the American Society for Information Science and Technology annual meeting, Long Beach, CA, October, 19-22, 2003, pp. 540-541.

Palmer, Carole L. & Timothy P. Hogan. Information in the HIV+ Community. (2003). Proceedings of the American Society for Information Science and Technology annual meeting, Long Beach, CA, October, 19-22, 2003, pp. 521-522.

Knutson, Ellen, Carole L. Palmer, & Michael Twidale. (2003). Tracking Metadata Use for Digital Collections. Proceedings of the Dublin Core Conference, Seattle, WA, September 28-October 2, 2003, pp. 243-244.

Palmer, Carole L. & Laura Neumann. (2002). The Information Work of Interdisciplinary Humanities Scholars: Exploration and Translation. *Library Quarterly* 72 (January), 85-117.

Palmer, Carole L. (2001). *Work at the Boundaries of Science: Information and the Interdisciplinary Research Process*. Dordrecht: Kluwer.

Brockman, William S., Laura Neumann, Carole L. Palmer, & Tonyia Tidline. (2001). *Scholarly Work in the Humanities and the Evolving Information Environment*. Washington, D.C.: Digital Library Federation and

the Council on Library and Information Resources.

Palmer, Carole L., & Cheryl Knott Malone. (2001). Elaborate Isolation: Metastructures of Knowledge about Women. *The Information Society* 17 (3), 179-194.

Palmer, Carole L. (2001). The Information Connection in Scholarly Synthesis. In *Discourse Synthesis: A Volume Dedicated to the History and Theory of Knowledge Cumulation*, edited by Raymond G. McInnis. Westport, CT: Praeger, pp. 125-141.

Palmer, Carole L. (1999). Aligning Studies of Information Seeking and Use with Domain Analysis. *Journal of the American Society for Information Science* 50 (12), 1139-1140.

Palmer, Carole L. (1999). Structures and Strategies of Interdisciplinary Science. *Journal of the American Society for Information Science* 50 (3), 242-253.

Palmer, Carole L. (1998). Ways of Working and Knowing across Boundaries: Research Practices of Interdisciplinary Scientists. In *Finding Common Ground: Creating the Library of the Future without Diminishing the Library of the Past*, edited by Cheryl LaGuardia and Barbara A. Mitchell. New York: Neal-Schuman, pp. 253-261.

Palmer, Carole L., ed. (1996). *Navigating among the Disciplines: The Library and Interdisciplinary Inquiry*. *Library Trends* 45 (2).

Palmer, Carole L. (1996). Information Work at the Boundaries of Science: Linking Information Services to Research Practices. *Library Trends* 45 (2), 165-191.

Selected Presentations
Making an Impact on Science: Moving from Research to Education. Digital Archives for Science and Engineering Resources (DASER) Summit III and Tri Society Symposium, Austin, TX, 3 November 2006.

Graduate Curriculum for Biological Information Specialists: A Key to Integration of Scale in Biology. 2nd International Digital Curation Conference, 21-22 November 2006, Glasgow, Scotland. With Heidorn, P. Bryan., Wright, Dan, and Cragin, Melissa H.

Making Information Work for Scholarship and Science. CIC Conference on Access and Infrastructure: Navigating Our Libraries in the New Information Service Landscape, 10 April 2006.

Supporting Scientific Information Work: Moving from Case Studies to Professional Training. Center of Excellence for Genomics and Bioinformatics, University of Tennessee, Memphis, 27 January 2006. With Melissa Cragin.

Metadata Standards Adoption and Knowledge-Sharing: A Study of Projects from the IMLS National Leadership Grants Program, 1998-2003. 67th American Society for Information Science and Technology annual meeting, Providence R.I., November 16, 2004.

Boundary Work and Doable Science. Association for Computing Machinery, Grace Hopper Celebration, Chicago, Illinois, October 7, 2004.

Modeling Digital Access on Scholarly Work. Invited colloquium, Pennsylvania State University, Pattee Library, University Park, PA, March, 2004.

Information Gathering and Collaborative Behavior of Interdisciplinary Scientists. Informatics Tools for Scientific Discovery and Collaboration. Arrowsmith Project short course, UIC Psychiatric Institute,

September 3-5, 2003.

Literature-based Discovery: New Trends and Techniques. American Society for Information Science and Technology annual meeting, Long Beach, CA. Coordinator and moderator; Panelists: Swanson, Don R., Smalheiser, Neil R., Srinivasan, P., and Hearst, M.

Information and Discovery in Neuroscience: Interdisciplinary Information Gathering and Collaboration. Informatics Tools for Scientific Discovery and Collaboration Workshop, UIC Psychiatric Institute, University of Illinois at Chicago, 4 September 2003.

Digital Gathering Grounds: Information Technologies and the Path to Discovery. Science Reference Retreat, Cornell University, 27 January 2003.

Interpreting the Information Environment of Interdisciplinary Science. Science Reference Retreat, Cornell University, 28 January 2003.

Shadow Structures of Scholarly Communication. Society for the Social Studies of Science Annual Conference, Milwaukee, Wisconsin, 7 November 2002.

E-Resource Impact: Challenges, Trends, Ideas. American Library Association Annual Conference, Atlanta, Georgia, 16 June 2002.

Information Support for Interdisciplinary Researchers. Visiting Speaker Program on Informatics, University of Illinois at Chicago, April 12, 2002.

Integrating Digital Libraries across the Curriculum. Association for Library and Information Science Education Conference, New Orleans, Louisiana, January 16, 2002. With J. Stephen Downie.

Scholarly Discovery and Synthesis in Practice: Materials, Machines, and Aha Moments. Center for Social Informatics, Indiana University, July 19, 2001.

Interdisciplinary Information Environments: Apprehending the Heterogeneity of Scholarly Work. The Chicago-Northwestern Roundtable on Humanities Computing, University of Chicago, March 9, 2001.

Configuring Digital Research Collections around Scholarly Work. Digital Library Federation Forum, Chicago, Illinois, November 19, 2000.

Information Work and Interdisciplinary Researchers: Blurred Boundaries and Eccentric Angles. Library Colloquium, Grainger Library, University of Illinois at Urbana-Champaign, November 16, 2000.

Scholarly Work with Diverse Information: A Gauge for Digital Research Libraries. School of Information Studies, Syracuse University, March 21, 2000.

Interdisciplinary Humanities Scholars and Hybrid Information Environments. Digital Libraries for Humanities Scholarship and Teaching. Joint International Conference of the Association for Computers and the Humanities and Association for Literary and Linguistic Computing. University of Virginia, Charlottesville, Virginia, June 12, 1999.

Ways of Working and Knowing across Boundaries. Finding Common Ground Conference, Harvard College Library, March 30, 1996.

Organizational Limitations to Advancing the Interdisciplinary Research Process. Presented with Leigh Estabrook. Knowledges: Production, Distribution, Revision Conference, University of Minnesota, April 1994.

Teaching

Graduate School of Library and Information Science, University of Illinois at U-C:

- Assistant Professor, 1996 - 2002; Associate Professor, 2002 -
  MLS courses:
  Information Transfer and Collaboration in Science
  Current Topics in Collection Development
  Use and Users of Information (on campus and distance education)
  Information Organization and Access (on campus and distance education)
  Reference Services in the Social Sciences
  Ph.D. courses:
  Design of Information Use Studies
  Knowledge Studies for Information Science
  Proseminar in Library and Information Science

- Visiting Instructor, 1995 - 1996.
  MLS Courses:
  Reference Services in the Social Sciences
  Information, Libraries, and Society

- Teaching Assistantships, 1995, 1993 and 1991.
  MLS Courses:
  Reference Services in the Social Sciences
  Introduction to Information Services
  Foundations of Library and Information Science

Selected Service Activities

Editorial board, *Biomedical Discovery and Collaboration*, 2005-

Midterm review team for Social Sciences and Humanities Research Council of Canada, September 29-October 1, 2004

American Society for Information Science and Technology Annual meeting
    Technical program committee and panel chair, 2006
    Technical program committee, 2003

Proposal review panelist, National Science Foundation, CISE, January 2000, April 2001, May 2002, March 2003; proposal review STS, 2005.

Scholarly Advisor for Evaluation, Women Writers Project, Brown University, 1997-99.

Graduate School of Library and Information Science, University of Illinois:

Executive Committee: 1997, 1998-1999, 1999-2000, 2004-2006
Information Technology Advisory Committee, 2005-2006
Bioinformatics Program Development Committee, 2004-2005
Dean Fifth-Year Evaluation Committee, 1999
Curriculum Committee: Spring 1998
Curriculum Committee, Access subcommittee: 1998-1999.
Doctoral Studies Committee: GSLIS, 1996-97, 2001-2002, Fall 2003, 2006-07

Admissions Committee: 1995-96; Chair, Fall 2000

University Libraries, University of Illinois at Urbana-Champaign, search committees, 2002, 2005.

Illinois Library Computer System Organization (ILCSO), User Interface Committee, 1989-1990.
Northern Illinois Computerized Library System Committee. Northern Illinois University Libraries, 1989.

Online Catalog Committee. Morris Library, Southern Illinois University, 1987- 1989.
Volunteer Museum Librarian. University Museum, Southern Illinois University, 1986-1988.

Academic and Professional Experience
Visiting Lecturer, Graduate School of Library and Information Science, University of Illinois at Urbana-Champaign, 1995-1996.

Research Assistant. Project on Scholarly Communication and Research in an Interdisciplinary Institute, University of Illinois, 1992-1994.

Research Assistant. Library Research Center. Graduate School of Library and Information Science, University of Illinois, 1991-1992.

Access Services Librarian. Reference Department, Northern Illinois University Libraries, Northern Illinois University, 1989-1990.

Assistant Humanities Librarian. Humanities Division, Morris Library, Southern Illinois University at Carbondale, 1986-1989.

Librarian. Women's Center. Vanderbilt University. 1985-1986.

Professional Associations
American Society for Information Science and Technology
Association for Integrative Studies
Association for Library and Information Science Education

Perry J. Trolard

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Saint Louis, MO 63117
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Education

2006: MLIS, Graduate School of Library and Information Science, University of Illinois at Urbana-Champaign

- Joseph Rediger Librarian as Humanist Award

2004: B.A., English, Calvin College (Grand Rapids, Michigan)

- Presidential Scholar
- Henrietta Ten Harmsel Scholarship

2001: Centre Universitaire d'Études Françaises (Université Stendhal - Grenoble 3, France)

Experience

09/2007 - present: Assistant Director, Humanities Digital Workshop, Washington University in Saint Louis

02/2007 - 09/2007: Humanities Computing Specialist, Humanities Digital Workshop, Washington University in Saint Louis

09/2006 - 01/2007: Web Designer, University of Illinois International Political Science Research Group (u2iPERG)

08/2006 - 01/2007: Digital Projects Assistant, Slavic and East European Library, UIUC

08/2005 - 08/2006: Graduate Assistant, Instructional Technology and Design Office, GSLIS, UIUC

Service & Professional Activity

02/2007 - present: Digital Implementation Group, Washington University in Saint Louis

02/2007 - present: Metadata Committee, Olin Library, Washington University in Saint Louis

08/2006 - 01/2007: TEI Tite development

As an independent study under John Unsworth, I developed a TEI customization for use with keyboarding vendors. There were three such customizations already in use at large US academic libraries; my task was to deduce a common subset from these to be adopted as a TEI vendor standard.

09/2005 - 12/2006: GSLIS Student Mentor Program

01/2006 - 08/2006: Graduate Employee Organization Grievance Committee

Skills

- OSes: PC, Mac OS X, and *nix (advanced skills in latter two)
- Web: advanced, standards-based XHTML & CSS, advanced Javascript
- Programming languages: Python, PHP, Bash shell
- Markup languages: TEI, XML, XSLT
- Natural languages: English (native), French (reading)

Brief Curriculum Vitae for

John M. Unsworth

Graduate School of Library and Information Science
University of Illinois, Urbana-Champaign

Contact Information

Employment:

- Dean and Professor, Graduate School of Library and Information Science (also Professor, Department of English, and Professor, Library Faculty), University of Illinois at Urbana-Champaign, 2003-present
- Associate Professor, Dept. of English, University of Virginia, 1993-2003 (tenured 1996)
- Director, Institute for Advanced Technology in the Humanities, University of Virginia, 1993-2003

Education:

- University of Virginia: Ph.D. in English, 1988
- Boston University: M.A. in English, 1982
- Amherst College: B.A. *Magna Cum Laude* in English, 1981

Recent and Forthcoming Publications:

- "Beyond the ACLS Report: An Interview with John Unsworth," with Kevin Guthrie. *Academic Commons*, December 2007 (Special Cyberinfrastructure Issue).
- *Our Cultural Commonwealth: The report of the American Council of Learned Societies Commission on Cyberinfrastructure for the Humanities and Social Sciences*, John Unsworth (Commission Chair), with commission members and Marlo Welshons (editor). ACLS: New York, 2006.
- *Electronic Textual Editing*, co-edited with Lou Burnard and Katherine O'Brien O'Keeffe. New York: Modern Language Association, 2006. Supported by the Modern Language Association's Committee on Scholarly Editions and the Text Encoding Initiative Consortium, funded by a grant from the Andrew W. Mellon Foundation. An uncorrected full-text preview version is available free from the TEI website.
- *A Companion to Digital Humanities*, co-edited with Susan Schreibman and Ray Siemens. New York: Blackwells, 2004. A free full-text version is also available online from the ADHO web site.
- "The Next Wave: Liberation Technology," from *The Chronicle of Higher Education*'s *Chronicle Review*, January 30, 2004.

Awards:

- The Richard W. Lyman Award, 2005
- Vodafone Fellow, Kings College, University College London, Spring 2005

Recent Teaching:

- LIS 310A: Digital Humanities (login required), Spring 2007.
- LIS 590AB Advanced Problems in LIS, Topic: 20th Century American Bestsellers (cross-listed as ENGL 564: Seminar in Literary Modes and Genres), Spring 2006
- LIS 590DH-L: Digital Humanities, Spring 2005

Editing and Curating:

- Co-editor (with Boyd Rawyard), Library Trends, 2006-present
- Member, Editorial Board, Digital Humanities Quarterly, 2006-present
- Member, Editorial Committee, Literary and Linguistic Computing, 2004-present
- Member, Editorial Board, *Arts and Humanities in Higher Education: an international journal of theory, research and practice*, 2001-present
- Member, Editorial Board, *Journal of Electronic Publishing*, University of Michigan Press.
- Co-founder and Editor Emeritus, Member, Editorial Board, *Postmodern Culture: an electronic journal of interdisciplinary criticism* (published by Johns Hopkins University Press): issue editor for issues 1.1, 1.3, 2.1, 2.3, 3.3, 4.2, 5.1, 5.3.
- Member, Blake Archive Advisory Board, 1998-present
- Member, Dickinson Editorial Collective Advisory Board, 1998-present
- Member, Romantic Circles Advisory Board, 1997-present

Recent and Upcoming Presentations:

- Speaker, EXP lecture series, co-sponsored by the Experiential Technologies Center (ETC) and the Center for Research in Engineering, Media, and Performance (REMAP), UCLA, April 11, 2008.
- "Cyberinfrastructure and Open Standards, Methods, and Communities," Panel on Open Digital Communities, Annual Convention of the Modern Language Association, Chicago, IL, Dec. 27, 2007.
- "Digital Repositories and Publishing in the Humanities, Arts, and Social Sciences: Challenges and Opportunities," Society for Scholarly Publishing, "Opportunities for Publishers in a World of Institutional Repositories," Washington, DC, November 12, 2007.
- Chair, Funders panel, Annual Members Meeting of the Text Encoding Initiative Consortium, University of Maryland, College Park, November 2nd.
- "University 2.0," Integration of Information Services into University Infrastructures: 7th Frankfurt Scientific Symposium, Universitat Frankfurt am Main, Wed. Oct. 12.
- Panel discussion on "The Foundations and Futures of Digital Humanities," InFormation Year conference, John Hope Franklin Center, Duke University, Durham, NC, April 20, 2007.
- "Digital Humanities Centers as Cyberinfrastructure," Plenary Address, Summit meeting for directors of digital humanities centers, Maryland Institute for Technology in the Humanities, College Park, MD, April 13, 2007.
- "Learning from nora: distributed software development in the humanities," Indiana University, Bloomington, IN, March 29, 2007.
- "New Directions in Humanities Research," Stanford Humanities Center, Stanford, CA, January 18, 2007.
- "Sustaining the Humanities and Social Sciences: A discussion of the ACLS report on cyberinfrastructure for humanities and social sciences," EDUCAUSE Center for Applied Research

Symposium, Carefree, AZ, December 7, 2006. [optimized for Opera browser, 1024x768 projection]
- "Digital Humanities: Beyond Representation," University of Central Florida, Orlando, FL, November 13, 2006.
- "All the King's Horses and All the King's Men Couldn't Do Text-Mining Across the Big Ten," Keynote at the University of Chicago Colloquium on Digital Humanities and Computer Science, Chicago, IL, November 5, 2006.
- Participant, ACRL Summit on Technology and Change in Academic Libraries, Chicago, IL, November 2, 2006.
- "Virtual Reunification of Scattered Archives," part of a symposium on Manuscript Matters, British Library, London, October 20, 2006. (PPT, 10.6MB)
- "Information Behaviors." Part of a panel on "Continuity and Change in University Scholarship," in a symposium on The Research Library in the 21st Century, held at the University of Texas at Austin, September 12, 2006.
- "Cyberinfrastructure in the U.S.A." Zhejiang University, Hangzhou, China. July 18, 2006.
- "Library and Information Science at the University of Illinois, Urbana-Champaign." Nanjing Public Library, Nanjing, China. July 14, 2006.
- "Managing the Digital Library: The ECHO Depository Project." Beihang University, Beijing, China. July 12, 2006.
- With Bei Yu, "Toward Discovering Potential Data Mining Applications in Literary Criticism," Digital Humanities 2006, The Sorbonne University, July 8, 2006.
- Participant, roundtable discussion on "The Fate and Function of Digital Humanities Centers," Digital Humanities 2006, The Sorbonne University, July 7, 2006.
- With Xin Xiang, "Connecting Text Mining and Natural Language Processing in a Humanistic Context" Digital Humanities 2006, The Sorbonne University, July 6, 2006.
- "Vernacular Computing," presented at the Electronic Publishing Workshop of the American Association of University Presses, New Orleans, June 14, 2006.
- "The Value of the Library to a Liberal Arts Education," presented at the Brookens Library, University of Illinois-Springfield, May 23, 2006.
- "Institutionalizing Humanities Computing," lecture co-sponsored by the Wilson Center for the Humanities and Arts and the Department of English, University of Georgia, February 24, 2006.
- "Cyberinfrastructure for Humanities and Social Sciences: A Report on the ACLS Commission," Director's Seminar, NCSA, February 21, 2006.
- "New Methods for Humanities Research," presented at Kenyon College, January 31, 2006.

Recent Service:

- Chair, search committee for Department Head, Curriculum and Instruction, College of Education, UIUC. 2007.
- Member, CIO's Information Technology Advisory Council, UIUC. 2007.
- Chair, Provost's ad hoc review committee reporting on Campus Information Technologies and Educations Services (CITES), UIUC. 2005.
- Chair, Commission on Cyberinfrastructure for the Humanities & Social Sciences, American Council of Learned Societies, 2004-2005.
- Chair, Steering Committee, Alliance of Digital Humanities Organizations, 2004-2007.
- Member, Board of Directors, Text Encoding Initiative Consortium, 2004-2005.
- Chair, Provost's five-year review committee reporting on the University Librarian, UIUC. 2004.
- Member, external board, Text Analysis Portal for Research. 2003-present.

- External evaluator, National Institute for Technology in Liberal Education Search Engine project, 2003-2006.

Recent Grants:

- "Enhancing Knowledge Discovery for Humanities through the Software Environment for the Advancement of Scholarly Research (SEASR)," funded by the Andrew W. Mellon Foundation, $1,125,000 (2007-2009). PI, Michael Welge (NCSA); Co-PIs Loretta Auvil (NCSA) and John Unsworth. Approved.
- "MONK: Metadata Offer New Knowledge," funded by the Andrew W. Mellon Foundation, $1,000,000 (2007-2009). PI with multiple partners at other universities in the US and Canada. Approved.
- ECHODep: a partnership in the National Digital Information Infrastructure Preservation Program, funded by the Library of Congress. $2,600,000 (2004-2007). Co-PI with Beth Sandore. Approved. $500,000 extension (2007-2009) approved March 2007.
- NORA: Web-based text-mining and visualization for humanities digital libraries, funded by the Andrew W. Mellon Foundation. $600,000 (2004-2006). PI with multiple partners at other universities in the US and Canada. Approved.

John Unsworth's Home Page
Last modified: Wednesday, 10-Oct-2007 09:46:15 CDT

Financial report 2001
31/des/01

BUDGET (copy from the Reviced Budget)				*ACCOUNT pr. December 31, 2001*			

INCOME

	Budget	Sub total	Total	Accounted	Sub total	Total	Number	
4 University Hosts	$20 000,00			$15 000,00			3	UVA not paid until February 2002, see notes
5 Div 0 Members	$25 000,00			$25 000,00			5	See notes on the membership fee from Univ. of Georgia
5 Div 1 Member	$11 250,00			$11 250,00			5	
5 Div 2 Members	$6 000,00			$8 250,00			6	
9 Div 3 Members	$4 250,00			$8 000,00			17	
14 Subscribers	$700,00			$750,00			15	
2 Sponsors	$0,00							
		$67 200,00			$68 250,00		36	
ACH TEI account	$9 500,00			$9 531,47				
Interest	$100,00			$107,86				
NEH	$65 982,00							See notes
		$75 582,00				$9 639,33		See notes
Host in-kind contributions	$20 000,00			$18 140,43				
STAFF (in-kind contributions)								
Executive Director HIT	$30 000,00			$38 305,44				
Administration HIT	$5 000,00			$8 668,17				
Editor Oxford	$6 666,67			$6 000,00				
Editor Brown	$10 500,00			$9 483,00				
IT/WEB/PUBL (Oxford)	$5 000,00			$14 402,60				
				$12 987,50				UVA staff, not on the budget
				$4 718,76				Other staff at Brown, not in the budget
Total contributions from the hosts		$77 166,67			$112 705,90			
Income in 2001			**$219 948,67**			$190 595,23		

EXPENSES

Board-meetings	$24 000,00			$9 498,43				See notes
Working-groups	$8 000,00			$1 155,16				
Travel staff	$10 000,00			$4 507,59				See notes
Insurance	$1 000,00			$0,00				Was not settle until 2002
Accounting and audit services	$5 000,00			$0,00				See notes
Annual Conference	$10 000,00			$1 151,25				See notes
Representation/PR	$4 000,00			$1 694,05				
Operational ex.	$500,00			$1 180,21				
Membership in other organisations	$500,00			$500,00				
		$63 000,00			$19 686,69			
NEH	$65 982,00							See notes
		$65 982,00			$0,00			See notes
Host in-kind contributions	$20 000,00			$18 140,43				
STAFF (paid by TEI-C)								
IT/WEB/PUBL (Oxford), new position	$3 111,00			$0,00				See notes
Editor Brown (12% FTP)	$9 500,00			$0,00				See notes
STAFF (in-kind contributions)								
Executive Director HIT	$30 000,00			$38 305,44				
Administration HIT	$5 000,00			$8 668,17				
Editor Oxford (10% FTP)	$6 666,67			$6 000,00				
Editor Brown (13% FTP)	$10 500,00			$9 483,00				
IT/WEB/PUBL (Oxford)	$5 000,00			$14 402,60				
				$12 987,50				UVA staff, not on the budget
				$4 718,76				Other staff at Brown, not in the budget
		$89 777,67			$112 705,90			
Expenses in 2001			**$218 759,67**			**$132 392,59**		
Balance			$1 189,00			$58 202,64		
Bank balance						$58 202,64		

Notes
Claims by April 30, 2002

INCOME			
UVA has not paid their 5000$ membership fee for 2001, did so in February 2002.		$5 000,00	
University of Georgia paid the membership fee to UVA, in March 2001		$5 000,00	
NEH grant, at UVA		$65 982,00	
Membership and subscription fees for 2001 and 2002, paid in 2001.		-$16 648,00	
			$59 334,00
Total income			$249 929,23

EXPENCES			
Accounting audit services 2001	Paid by UVA in October (with the fee from Univ. of Ge	$5 400,00	
NEH work, June to Dec. 2001		$33 601,83	
NEH work, stipulated for Jan to May 2002		$32 380,17	
Expenses for the members meeting paid in 2002		$12 276,07	
Workgroup expenses paid in 2002, but used in 2001		$1 429,15	
IT/WEB/PUBL (Oxford), new position	Not paid to Oxford yet	$2 412,17	
Editor Brown (12% FTP)	Paid to Brown in February 2002	$9 483,00	
Travels expenses to be reimburse to Oxford		$4 875,26	
CD production costs at Oxford		$2 238,60	
TEI Guidelines Binding & postage		$318,70	
Other expenses at Oxford		$381,99	
			$104 796,94
Total expenses			$237 189,53
Result 2001			$12 739,70

Other notes:
The expenses for the board meeting and memebrs meeting will raice because some of the expenses for travels have not been claimed yet. Aproximately $1100 of the travels to be reimburse to Oxford is going to be accounting as expenses for the board meetings. Aproximately $460 of the travels to be reimburse to Oxford is going to be accounting as expenses for the members meeting

TEI Consortium

Treasurer's Report 2002

Claus Huitfeldt, 29 October 2003

Summary

In 2002, the consortium's second year, income as well as expenses were considerably lower than budgetted. The result was negative, as budgetted. However, this negative result was bigger than budgetted, and consumed almost the entire positive result from 2001. The figures are as follows:

	Budget	**Result**
Income	403 382	248 837
Expenses	410 382	261 816
Result	-7 000	- 12 978

The result for 2001 was USD 13 244. Therefore, the result for the two years taken together is still on the positive side (i.e. USD 267).

The reduced income is due above all to lower income from membership fees and project grants.

The reduced income has been compensated by reduced spending, above all on activites (such as meetings, work groups etc.)

IRS Report 2002

The IRS report is based on cash accounting, and shows income and expenses as registered on the TEI bank account in the calendar year 2002.

Thus, this report includes income and expenses accrued in 2001 but paid/received only in 2002. as well as income and expenses for 2003 accrued in 2002.

Results 2002

This report is based on accrual accounting. The first column shows the budget for 2002 as of October the same year, the second column shows the actual results for 2002, and the last three columns shows the accrual accounting year, so as to facilitate comparison with the IRS Report.

Please note that the NEH project has been accounted for separately, and that only those parts of the NEH project expenses that have actually been paid by the Consortium show up in the results. Furthermore, expenses related to the NEH budget as well as host in-kind cash contributions have been reported as host expenses.

NEH 2001-2002

Except as indicated in notes, the NEH income and expenses comes in addition to those accounted for in the TEI Results for 2002

TEI Consortium: IRS Report 2002

Date prepared: 06/10/2003

Accounting 2002

Period: Through 12/31/2002

INCOME STATEMENT AND BALANCE SHEET

Income

Member and subscriber fees:

Members	102 500,00	
Subscribers	1 700,00	
Sub total, Members etc		104 200,00

Other income:

Host contributions (other expenses)	4 367,80	
Training sessions	800,00	
TEI Guidelines (sale)	735,00	
Interest earned	232,28	
Sub total, other income		6 135,08

Total income   **110 335,08**

In-kind contributions:

Staff: In-kind contributions

Bergen	29 373,00	
Oxford	30 000,00	
Brown	37 200,00	
UVA	9 600,00	
Sub total, staff in-kind contributions		106 173,00

Other in-kind contributions from hosts

UVA, directly paid expenses	400,00	

Total in-kind   **106 573,00**

TOTAL INCOME IN 2002, incl. in-kind contributions   **216 908,08**

BALANCE   **Expences**   **Income**

	Debits			Credits
Staff (in-kind)	106 173,00		In-kind contributions (staff)	106 173,00
In-kind expenses at hosts	400,00		In-kind expenses at hosts	400,00
Staff (paid by TEI)	32 151,65		Hosts contributions (other expenses)	4 367,80
Board meetings	17 611,28		Membership (inst.)	102 500,00
Annual Conference/Members' meeting	19 451,29		Subscribers (indiv.)	1 700,00
Council meetings	5 547,69		Sponsors	0,00
Work Groups	7 262,45		Training sessions	800,00
Travel, staff	4 069,84		ACH TEI account	0,00
Training sessions	800,00		NEH	0,00
Insurance	1 221,00		Interest earned	232,28
Accounting and audit service	7 600,00		TEI Guidelines (sale)	735,00
TEI guidelines (incl. Service charges)	17 538,30			
Representation/PR	1 620,37			
Operational expenses	1 654,02			
Membership in other org.	1 000,00			
		224 100,89		
Bank account, net transactions for 2002		-7 192,81		
		216 908,08		216 908,08

Bank account:

Beginning balance, Jan 01, 2002	58 202,64
Sum, transactions 2002	-7 192,81
Per December 31, 2002	51 009,83

TEI Consortium: Results 2002

Last changes: June 09, 2003. Claus Huitfeldt

	Budget			Result			Accounted in 2002	Accounted in 2003	Accounted in 2002, concerns 2001	Notes
	Sub total	Total	Grand total	Sub total	Total	Grand total				
INCOME										
MEMBERS AND SUBSCRIBERS										
Members	167 600			110 148			102 500	1 000	6 648	
Subscribers	2 500			1 500			1 700	-200		
		170 100			111 648					
PROJECTS										
Hosts, directly paid expenses	0			4 368			4 368			
NEH project	65 982			24 482				24 482		
Grants from research funds	50 000			0						
		115 982			28 850					
SERVICES										
Training courses	2 000			800			800			
Annual Conference/Members' Meeting	3 000			0			0			
TEI Guidelines (per June 30, 2002)	5 000			735			735			
Certification Program	5 000			0						
		15 000			1 535					
HOST IN KIND CONTRIBUTIONS										
Bergen	25 000			29 373			29 373			
Oxford	30 000			30 000			30 000			
Brown	37 200			37 200			37 200			
UVA	10 000			10 000			10 000			1
		102 200			106 573					
MISCELLANEOUS										
Interest	100			232			232			
		100			232					
			403 382			**248 838**	**216 908**	**25 282**	**6 648**	

EXPENSES

ACTIVITIES								
Board meetings	28 000		19 826		17 611	2 215		
Council meetings	28 000		5 548		5 548			
Work groups	26 000		5 833		7 262		-1 429	
Annual Conference/Members' meeting	15 000		7 906		19 451	731	-12 276	
Travel staff	10 000		-562		4 070	243	-4 875	
Training courses	2 000		800		800			
Certification Program	5 000		0					
TEI Guidelines (per June 30, 2002), incl. service charges	22 000		17 538		17 538			
		136 000		56 890				
PROJECTS								
NEH project	65 982		0					2
Expenses paid by hosts included in *STAFF (and other expenses a*	0		0					
		65 982		0				
STAFF (and other expenses at hosts)								
Bergen	50 000		54 373		29 373	25 000		
Oxford	74 000		68 090		38 000	32 502	-2 412	3
Brown	57 200		65 202		61 352	13 333	-9 483	4
UVA	10 000		10 000		10 000			
		191 200		197 665				
MISCELLANEOUS								
Insurance	1 200		1 221		1 221			
Accounting and audit services	5 000		4 700		7 600	2 500	-5 400	5
Representation/PR	5 000		-1 319		1 620		-2 939	
Operational ex.	5 000		1 654		1 654			
Membership in other organizations	1 000		500		1 000	-500		6
Correction of travel, reported double in status for 2001			505				505	
		17 200		7 261				
Total expenses 2002		**410 382**		**261 816**	**224 101**	**76 025**	**-38 310**	

RESULT

Result 2002	7000	-7000		-12978	-7193	-50743	44958
Result 2001	13245	13245		13245			
Result 2001 + 2002	20245	6245		267			

NOTES

1 Incl $ 400 direct paid expenses.

2 Included in staff expenses at hosts

3 In addition: direct paid expenses = $4 368. Staff payment: less than budget

4 Staff payment = $ 8 001,97 more than budget. This will be deducted from 2003 staff payment.

5 In addition: 400 paid by UVA

6 Incl $ 400 direct paid expenses.

TEI Consortium: NEH project 2001-2002

Last changes: June 15, 2003. Claus Huitfeldt

NB: Does not include cost sharing

Financial Report 1 May 2001 -- 31 December, 2002								
	Budget 2001-03		**Spent in 2001**		**Spent in 2002**		**Remaining budget**	
	Sub Total	Total	Sub Total	Total	Sub Total	Total	Sub Total	Total
Staff								
Bergen	18 334				1 665		16 669	
Oxford	19 166		20 000		10 989		-11 823	
Brown	7 500		4 167		11 828		-8 495	
UVA	27 500				3 125		24 375	
Sub total		**72 500**		**24 167**		**27 607**		**20 726**
Travel								
Work group	34 000				6 459		27 541	
Other	20 005						20 005	
Sub total		**54 005**		**0**		**6 459**		**47 546**
Other								
Sub total		**5 200**		**0**		**0**		**5200**
Grand Total		**131 705**		**24 167**		**34 066**		**73 472**
Note: All expenses except staff expenses for Bergen, Oxford and Brown in 2002 (totalling 24 482) have been paid directly from UVA								

Summary

In contrast to the previous budget year, in 2003, the consortium's third year,
(a) the large gap between budgeted incomes and expenses and result was resolved bringing more realism, and less ambition into our financial projections,
(b) the negative result was also turned to a weak positive result resulting in an accumulated result (adding balance from 2002) amounting to 5 438 USD

Budget Year	2002		2003	
	Budget	Result	**Budget**	**Result**
Income *USD*	403 382	248 837	**240 672**	**222 621**
Expenses *USD*	410 382	261 816	**240 672**	**217 449**
Results USD	*-7 000*	*-12 978*	*0*	*5172*

Results 2003

This report is based on accrual accounting. The first column shows the budget for 2003 as of July 2003, the second column shows the actual results for 2003.

Comments

1. Membership fee income appears to be lower than expected/budgeted.
2. The discrepancy between budgeted: 73 472 USD against the 52 154 USD result for the *NEH Project* is due to the initial projection of 73 472 USD as income from the NEH project in the budget for 2003. However, only 52 154 USD was actually accounted for. UoB has not reimbursed UoV in connection with the NEH grant, since the grant was paid to UoV. Accordingly, UoV did not send an invoice to TEI-C for money which was paid directly to UoV. The NEH project was administered from UoV, while all hosts contributed to activities related to the grant. Additionally UoV has covered travel expenses for the 'migration work group' (SGML to XML). While the grant was kept outside the 2002 financial report, the 2003 accountancy reflects a new set of procedures: all host were asked to send a bill reflecting their in kind NEH contribution to TEI-C. These bills were went further from the executive office in Bergen to UoV where all detail records are kept. Approximately 50% of the NEH grant was incorporated into the TEI-C budget for 2003, of which, again,   approximately 50% was registered in our accountancy.
3. UoV has a "Staff and other expenses at hosts" budget of 25 000 USD in 2003, which was used to cover "a technical writer", but the result for 2003 was 15 000 USD here.
4. Oxford Staff expenses have been lower than budgeted 30 000 USD against 21 995 USD result.

5. The hosts have contributed significantly more than budgeted.

IRS Report 2003

The IRS report is based on cash accounting, and shows income and expenses as registered on the TEI bank account in the calendar year 2003.
Thus, this report includes income and expenses accrued in 2002 but paid/received only in 2003, as well as income and expenses for 2004 accrued in 2003.

Bergen, Norway 2004, October 18th

Daniel Apollon
Honorary Treasurer

TEI Consortium: Results for 2003

Last changes: Oct 16, 2004. Tone Merete Bruvik
All numbers in US Dollars

INCOME

	Budget for 2003 (as of July 2003)			Results for 2003 (calculated Oct. 10, 2004)			Notes
	Sub total	Total	Grand total	Sub total	Total	Grand total	
MEMBERS AND SUBSCRIBERS							
Members	110 000			103 750			
Subscribers	2 000			1 950			
		112 000			105 700		1)
PROJECTS							
NEH project	73 472			52 154			
		73 472			52 154		2)
SERVICES							
Training courses	2 000						
Annual Conference/Members' Meeting	3 000			189			
TEI Guidelines	5 000			7 716			
		10 000			7 905		
HOST CONTRIBUTIONS							3)
University of Bergen - Aksis	10 000			12 304			
Oxford University	15 000			31 098			
Brown University	10 000			21 000			
University of Virginia	10 000			8 000			
		45 000			72 402		4)
MISCELLANEOUS							
Interest	200			60			
		200			60		
Total income			**240 672**			**238 221**	

EXPENSES

	Budget for 2003 (as of July 2003)			Results for 2003 (calculated Oct. 10, 2004))			Notes
	Sub total	Total	Grand total	Sub total	Total	Grand total	
ACTIVITIES							
Board meetings	6 000			2 129			
Council meetings	6 000			9 003			
Work groups (other than NEH)	13 000			6 813			
Annual Conference/Members' meeting	10 000			13 624			
Travel staff	2 000			0			
Training courses	2 000			0			
TEI Guidelines (incl. service charges)	500			1 345			
		39 500			32 914		
PROJECTS							
NEH project, work group travels	33 000			33 257			
NEH project, other expenses	1 472						
		34 472			33 257		
HOST CONTRIBUTIONS							3)
University of Bergen - Aksis	10 000			12 304			
Oxford University	15 000			31 098			
Brown University	10 000			21 000			
University of Virginia	10 000			8 000			
		45 000			72 402		4)
STAFF and other expenses at hosts							
University of Bergen - Aksis	35 000			28 800			
Oxford University	30 000			21 965			
Brown University	22 000			24 000			
University of Virginia	25 000			15 000			
		112 000			89 765		5)
MISCELLANEOUS							6)
Insurance	1 400			0			
Accounting and audit services	3 500			2 400			
Representation/PR	2 300			644			
Operational ex.	2 000			1 166			
Membership in other organizations	500			500			
		9 700			4 711		
Total expenses			**240 672**			**233 049**	

RESULT

Result 2003			0			5 172	
Result 2002			267			267	
Accumulated result	0		267	0		5 438	

Notes

1): Membership and subscription income were lower than expected.
2): The income from the NEH Project was lower than expected. The NEH grant was managed by University of Virginia, and a significant part of the expenses in 2003 was paid directly by them and did not passed by the TEI-C accounting system, a separate report on this has to be put forward.
3): The in-kind contribution from the hosts are both on the expenses side and on the income, this is done this way in the budget to make the in-kind contribution from the hosts visible.
4): The budget for the hosts was reduced in October 2003 as it was clear at the income would be lower than expected in budget from June. The hosts agreed to give more in in-kind contribution (the total ended up at $72402, an increase of $27404 compared to the June budget).
5): As the hosts agreed to give more in in-kind, the reimbursement for staff and other expenses at the hosts where reduced with $22235, from $112000 down to $89765.
6): There was not paid any insurance in 2003 because the insurance was not prolonged in 2003 due to a misunderstanding. A new insurance agreement was set up in 2004.

TEI Consortium: IRS Report 2003

Date prepared: 06/10/2004

Accounting 2003

Period: Through 12/31/2003

INCOME STATEMENT AND BALANCE SHEET

Income

Member and subscriber fees:

Members	101 950,00	
Subscribers	1 900,00	
Sub total, Members etc		103 850,00

Other income:

Host contributions (other expenses)		
Training sessions	189,35	
TEI Guidelines (sale)	7 716,00	
Interest earned	59,80	
Sub total, other income		7 965,15

Total income — 111 815,15

In-kind contributions:

Staff: In-kind contributions

Bergen	12 304,05	
Oxford	31 098,00	
Brown	21 000,00	
UVA	7 400,00	
Sub total, staff in-kind contributions		71 802,05

Other in-kind contributions from hosts

Directly paid expenses	0,00	

Total in-kind — 71 802,05

TOTAL INCOME IN 2003, incl. in-kind contributions — 183 617,20

BALANCE

Expences	Debits	Income	Credits
Staff (in-kind)	70 148,00	In-kind contributions (staff)	70 148,00
Staff (paid by TEI)	112 758,72	Hosts contributions (other expenses)	0,00
Board meetings	2 747,74	University Hosts	0,00
Members meeting	311,70	Membership (inst.)	101 950,00
Council meetings	9 003,22	Subscribers (indiv.)	1 900,00
Working Groups	6 813,43	Sponsors	0,00
Travel, staff	243,30	Training sessions	189,35
Training sessions	0,00	ACH TEI account	0,00
Insurance	0,00	NEH project, income	0,00
Accounting and audit service	4 900,00	Interest earned	59,80
Annual Conference	0,00	TEI Guidelines (sale)	7 716,00
Service charges: TEIguidelines	1 345,00		
Publishing	0,00		
Representation/PR	644,39		
Operational expenses	1 102,71		
Membership in other org.	0,00		
NEH project, expenses	5 257,57		
	215 275,78		
Bank account, net transactions for 2003	-33 312,63		
	181 963,15		181 963,15

Bank account:

Beginning balance, Jan 01, 2003	51 009,83	
Sum, net transactions 2003	-33 312,63	
Per December 31, 2003	17 697,20	

<p style="text-align: center">TEI Consortium
Treasurer's Status Report for 2004
and proposed budget for 2005</p>

Summary

The budget for 2004 approved by the Board in Nancy, October 2003 totaled USD 160 200 expenses against USD 160 200 incomes with an accumulated result amounting to 5 437 USD.

By September 2004 only 79 957 USD of the budgeted income was accounted for. However, the predicted result for 2004 has been adjusted to 147 526 USD (incoming member fees, and contributions from the hosts).

Expenses budgeted to 160 200 USD are predicted to be somewhat lower: 156 287 USD of which only 31 046 USD have been registered by September 2004.

The 2004 budget reflects rather faithfully original projections, avoids negative balance, but also reflects some stagnation in the recruitment activities and reduction of host activities.

In the enclosed detailed budget report the first column presents the revised budget for 2004 as put forward in February 2004. The second column presents income and expenses as of September 30, 2004, and the third column contains the Treasurer's current projection for 2004.

It should be noted that this budget reflects the absence of NEH Grant.

Further enclosed is the Treasurer's proposed budget for 2005, to be discussed by the Board at its meeting in Baltimore October 24, 2004.

A negative accumulated result amounting to –3 323 USD is expected for 2004 (incorporating an expected negative -8 761 USD negative result for 2004) The Treasurer suggests to attempt to cut expenses in order to avoid a negative balance. The Board should discuss which activities should undergo a budget cut. Alternatively, transfer of the negative balance to 2005 should be explicitly approved by the Board.

The 2005 budget build upon the assumption that the Consortium will be able to bring the negative trend to a halt by increasing membership incomes. Only a modest increase from 2004 projected 147 526 USD to projected 2005 151 760 USD, coupled with an equally modest reduction in expenses from projected 2004 156 287 USD to projected for 2005 145 226 USD will be necessary to absorb the accumulated negative result. The Board should assess the realism of these projections.

Further comments (2004 Status and Budget):

1. Gap between projected member fee payments 105 166 USD and budgeted 112 000 USD.
    The Board should discuss and assess recruitment policies on the basis of these figures.
2. Board meeting expenses have been approximately 40% than budgeted.
3. Work group expenses have been 50% lower than budgeted.

Bergen, Norway, 2004 October 18th

Daniel Apollon
Honorary Treasurer

TEI Consortium: Status and Budget 2004

Last changes: October 16, 2004. Tone Merete Bruvik
All numbers in US Dollars

INCOME

	Proposed budget for 2004 as of Februar 6, 2004			Income and expenses for 2004 as of September 30, 2004			Predicted result for 2004 by September 30, 2004			Notes
	Sub total	Total	Grand total	Sub total	Total	Grand total	Sub total	Total	Grand total	
MEMBERS AND SUBSCRIBERS										1)
Members	110 000			78 766			103 766			
Subscribers	2 000			1 150			1 400			
		112 000			79 916			105 166		
SERVICES										
Training courses										
Annual Conference/Members' Meeting	3 000						300			2)
TEI Guidelines	5 000						2 000			3)
		8 000			0			2 300		
HOST CONTRIBUTIONS										4)
Bergen	10 000						10 000			
Oxford	15 000						15 000			
Brown	5 000						5 000			
UVA	10 000						10 000			
		40 000			0			40 000		5)
MISCELLANEOUS										
Interest	200			41			60			
		200			41			60		
Total income			**160 200**			**79 957**			**147 526**	

EXPENSES

	Proposed budget of 2004 as of Februar 6, 2004			Income and expenses for 2004 as of September 30, 2004			Predicted result for 2004 by September 30, 2004			Notes
	Sub total	Total	Grand total	Sub total	Total	Grand total	Sub total	Total	Grand total	
ACTIVITIES										
Board meetings	10 000			219			14 400			6)
Council meetings	10 000			10 026			10 026			
Work groups	20 000			7 085			15 000			7)
Annual Conference/Members' meeting	4 000						4 000			
Travel staff	1 000			661			661			
Training courses										
TEI Guidelines (incl. service charges)	500						500			
		45 500			17 992			44 587		
PROJECTS										
NEH										
HOST CONTRIBUTIONS										4)
Bergen	10 000						10 000			
Oxford	15 000						15 000			
Brown	5 000						5 000			
UVA	10 000						10 000			
		40 000			0			40 000		5)
STAFF (and other expenses at hosts)										
Bergen	25 500						25 500			
Oxford	20 500						20 500			
Brown	20 500			10 559			20 500			
UVA	0						0			
		66 500			10 559			66 500		5)
MISCELLANEOUS										
Insurance	1 500			1 500			1 500			
Accounting and audit services	2 500						2 500			
Representation/PR	1 700									
Operational ex.	2 000			996			1 200			
Membership in other organizations	500									
		8 200			2 496			5 200		
Total expenses			**160 200**			**31 046**			**156 287**	

RESULT

Result 2004			**0**			**48 911**			**-8 761**	
Result 2003			**5 172**			**5 172**			**5 172**	
Result 2002			**267**			**267**			**267**	
Accumulated result			**5 439**			**54 349**			**-3 323**	8)

Notes:

1. A significant number of members pay the membership fee just before the annual members´ meeting, which make the expected total of $103766 to be a realistic estimate.
2. The income of the TEI Annual Members´ Meeting was based on a registration fee of $100 from each participants, but this was later dropt. Only non-members/subscribers have to pay.
3. We have not yet received the report from the University of Virginia Press on the number of TEI Guidelines sold in 2004, but it is expected that the figure will be lower than the budget estimate.
4. The in-kind contribution from the hosts are both on the expenses side and on the income, this is done this way in the budget to make the in-kind contribution from the hosts visible.
5. The hosts are late with their reporting on both in-kind contribution and activities that should be reimbursed, that explain that the figures by September 30 is very low. There are however no reason to believe that they will not fulfil there commitments.
6. The annual Board meeting take place in connection to the Members´ Meeting and the actually costs are not known at this point. The budget for 2004 is very low, and we have to expect higher expenses here than we have in the budget.
7. Work groups: the expenses is estimated to be been 50% lower than budgeted as few of the workgroups have physical meetings which TEI-C has to pay.
8): An accumulated negative result of $3323 has to be coved in the bugdet for 2005.

TEI Consortium: Budget 2005

Last changes: October 16, 2004. Tone Merete Bruvik
All numbers in US Dollars

INCOME

	Predicted result for 2004 by September 30, 2004			Proposed budget for 2005			Notes
	Sub total	Total	Grand total	Sub total	Total	Grand total	
MEMBERS AND SUBSCRIBERS							
Members	103 766			110 000			1)
Subscribers	1 400			1 400			
		105 166			111 400		
SERVICES							
Annual Conference/Members' Meeting	300			300			
TEI Guidelines	2 000			0			
		2 300			300		
HOST CONTRIBUTIONS							2)
Host 1	10 000			10 000			3)
Host 2	15 000			10 000			
Host 3	5 000			10 000			
Host 4	10 000			10 000			
		40 000			40 000		
MISCELLANEOUS							
Interest	60			60			
		60			60		
Total income			**147 526**			**151 760**	

EXPENSES

	Predicted result for 2004 by September 30, 2004			Proposed budget for 2005			
	Sub total	Total	Grand total	Sub total	Total	Grand total	
ACTIVITIES							
Board meetings	14 400			10 000			
Council meetings	10 026			10 026			
Work groups	15 000			15 000			
Annual Conference/Members' meeting	4 000			4 000			
Travel staff	661			500			
Training courses							
TEI Guidelines (incl. service charges)	500			500			
		44 587			40 026		
PROJECTS							
NEH							
HOST CONTRIBUTIONS							
Host 1	10 000			10 000			
Host 2	15 000			10 000			
Host 3	5 000			10 000			
Host 4	10 000			10 000			
		40 000			40 000		
STAFF (and other expenses at hosts)							
Host 1	25 500			15 000			
Host 2	20 500			15 000			
Host 3	20 500			15 000			
Host 4	0			15 000			
		66 500			60 000		
MISCELLANEOUS							
Insurance	1 500			1 500			
Accounting and audit services	2 500			2 500			
Representation/PR							
Operational ex.	1 200			1 200			
Membership in other organizations							
		5 200			5 200		
Total expenses			**156 287**			**145 226**	

RESULT

Result 2005						6 534	
Result 2004			-8 761			-8 761	
Result 2003			5 172			5 172	
Result 2002			267			267	
Accumulated result			**-3 323**			**3 211**	

Notes:

1): A small increase in the membership fee income should be possible if the recruitment effort is increased.
2): The in-kind contribution from the hosts are both on the expenses side and on the income, this is done this way in the budget to make the in-kind contribution from the hosts visible.
3): A new host period starts in 2005, and at the time this budget was made was is not settle who will be the four host institutions for the next four years.

Text Encoding Initiative Consortium
Expenses/Income Report - Fall 2005

Prepared 31 December 2005

Currency = US $

2005

EXPENSES		INCOME	
Staff		**Membership Dues**	
Account Administration (9 months)	3,125.01	Div0	69,935.00
Membership Administration (9 months)	0.00	Div1	3,750.00
Administration (Bergen 3 months)	6,002.87	Div2	11,199.00
Editor: Oxford	20,500.00	Div3	16,071.73
Editor: Brown	27,423.07	Subscriber Dues	1,155.88
Subtotal	**57,050.95**	**Subtotal**	**102,111.61**
Miscellaneous costs		**Other**	
Insurance	1,500.00	Meeting sponsor	1,800.00
Attorney	100.00	Other	47.57
State Non-Profit Org. Reg.	25.00	Publication royalties	2,545.00
Tax compliance services	3,000.00	Interest Income	49.42
Bank charges	771.84	**Subtotal**	**4,441.99**
Trademark application	1,054.62		
Subtotal	**6,451.46**	**Total Income**	**106,553.60**
Meetings			
Board meeting	16,604.92		
Council meeting	15,608.10	**BALANCE 2005**	
Work Groups	843.90		
Members meeting	4,547.16		
Subtotal	**37,604.08**		

BALANCE 2005

Income	Expenses	Total
106,553.60	-101,106.49	5,447.11

Total Expenses   **101,106.49**

2005 In-Kind Contributions

Brown	16,188.43
Nancy	25,493.13
Oxford	41,684.39
Virginia	<u>11,249.99</u>
	94,615.94

Bank Account

Beginning balance 01/01/05	56,443.00
Credits	106,553.60
Debits	-101,106.49
Ending balance 12/31/05	61,890.11

Text Encoding Initiative Consortium
2006 Calendar Year

Prepared Oct. 11, 2007; rev. Oct. 22, 2007

Currency = $

EXPENSES 2006	Current	INCOME 2006	Current
Staff		Membership	93,009.07
Account Administration	6,250.02	Subscriber	1,100.00
Membership Administration	15,508.85	Grant	19,330.65
Ed. Infra.: Oxford	5,000.00	P4 Royalties	485.50
Editor: Oxford	32,500.00	Meeting sponsor	2,950.00
Editor: Brown	15,018.30	Other (pay pal test)	0.29
Subtotal	74,277.17	Interest Income	65.59
		Total Income	**116,941.10**
Miscellaneous costs			
Insurance	1,500.00		
Tax compliance services	2,500.00	**BALANCE 2006**	**116,941.10**
Bank charges	902.47		**-127,392.00**
Attorney	100.00		**-10,450.90**
Non-profit Registration	25.00		
Trademark application	436.59	**IN-KIND Services**	
Subtotal	5,464.06	Virginia	10,000.00
		Oxford	24,419.49
Meetings		Brown	28,600.00
Board meeting	19,229.10	Nancy	34,056.40
Council meeting	19,306.68		**97,075.89**
Work Groups	0.00	**BANK ACCOUNT**	
Members meeting	9,114.99	Beginning balance 01/01/0	61,890
Subtotal	47,650.77	Credits	116,941.10
		Debits	-127,392.00
Total Expenses	**127,392.00**	Ending balance 12/31/06	**51,439.21**