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Association for Documentary Editing 2008–9 Annual Plan

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Association for Documentary Editing 2008–9 Annual Plan

Introduction

The ADE is at an important crossroads. Much has changed in the documentary editing profession in the past three decades. New methods of publication have emerged; the era of the large projects is diminishing; and the number of users of published historical documents has exploded as a result of the Web. Many more people are engaged in the practices that we call documentary editing (the selection, transcription, and explication of documents), but these same individuals don't define their work or their profession as such. Scholars use new and changing tools to produce their work in ways that weren't imaginable when the Association was formed in St. Louis in 1978. At the same time, documentary editions are getting national attention. Transcription practices in a new edition of Robert Frost's writings have received national attention through articles in *The New York Times* and *Slate*. In February 2008, the U.S. Senate Judiciary Committee held hearings on the Founding Fathers papers. Thus, this is an opportune time to look ahead.

The questions to explore are many. In light of new technologies, who is a documentary editor? Why should documentary editors join the ADE? What benefits does the ADE need to provide its members? What value do we add to make nontraditional members want to join us? Should we go beyond simply adding as members the small numbers of individuals working on projects like our own, and redefine what we have to offer a much broader community? Can we actively woo scholars whose work overlaps with ours, find archivists, public historians, and professors who are working on projects, both in traditional print form and in digital publication, and invite them to join, pitching the organization in a more broad-based manner that encourages such participation? What services do they need? What should our journal, *Documentary Editing*, become? How do we better educate documentary editors? How does the ADE get more financial resources to do what it needs to do? How can the ADE take advantage of federal and private grants to implement its mission? How do we continue to advocate for documentary editing projects?

Those who founded the ADE in 1978 knew that change was needed to promote documentary editing and created our organization. We believe that in that same spirit, this is the time to meet the challenges of our own time.

The ADE is an all-volunteer organization and the Council meets only once a year. In addition, the president's term runs only one year, and presidents do not preside over

council meetings until the end of their terms. In order to address these continuity issues, in 2007 President Michael Stevens and President-elect Cathy Hajo agreed that the ADE needed a new way to provide continuity as well as provide for consistent long-term direction for the organization. Stevens and Hajo agreed to collaborate on major decisions and set forth a common planning agenda that could be implemented over a two-year period. By setting out a new model of co-leadership, they hoped to set a precedent that would be followed in the future.

In addition, the organizational structure of the ADE as well as the ever-changing environment places an even greater importance on both strategic and operational planning. Starting in 2007, the ADE Council has approved an ongoing process in which the ADE regularly assesses its direction, lays out objectives, and measures how well it is doing semi-annually.

Process

A planning committee was appointed at the ADE annual meeting in Richmond, VA, in November 2007. During the subsequent six months, four task forces developed think pieces on the issues of values, advocacy, education, and finances. The papers were posted on the ADE website and member comment was solicited and posted on the website.

The ADE Planning Committee convened for a retreat in Madison, WI, on June 12-14. The Planning Committee consisted of the Council (Helen Deese, Lisa Francavilla, Mary Gallagher, Cathy Moran Hajo, Martha King, Richard Leffler, John Lupton, and Michael Stevens) and six other members: Charlene Bickford, Kent Calder, John Fierst, Beth Luey, Sue Perdue and Jennifer Stertz. (Council and Planning Committee member Ron Bosco was unable to attend the planning retreat.)

The committee reviewed the task force reports and comments as well as the ADE's mission, vision, and values and conducted an environmental scan that involved identifying the ADE's strengths, weaknesses, opportunities, and threats. Based on that background work, the committee identified long-term strategic objectives and short-term action items. The total number of objectives and action items were far more than could be reasonably accomplished in the next year and through a ranking process the group came to a consensus about what issues were most important to deal with in the coming year. It also committed itself to using an ongoing planning process, in which the Council will semi-annually review progress, assess direction, and readjust as is needed.

Too many plans have become "credenza art," serving only to decorate shelves. If the ADE's plan is to succeed, it must be informal, flexible, and clear, with implementation as its goal. That is why the ADE invested little in developing elaborate print documents. The plan itself consists of a brief narrative summary, below, as well as a table of actions.

Mission

The Association for Documentary Editing will encourage support for the publication of our documentary heritage and promote best practices and cooperation among editors regardless of the media in which they work.

Vision

Through improved internal and external communications, the Association will make good use of electronic resources to create collaboration and editorial educational opportunities. By planning strategically, the Association will strive for a more efficient infrastructure, will proactively advocate for knowledge of and funding for editions, will achieve greater financial health, and will increase enthusiasm for our documentary heritage.

Values

Members of the Association for Documentary Editing believe that the documents that reflect our heritage should be accessible to those who need and want them and that some documents require the fuller treatment and contextualization provided by documentary editors. True accessibility requires that those documents be accurately transcribed, with full transparency of method; that the selection and annotation should reflect sound scholarship and intellectual integrity; that some documents are so significant that they require contextualization in the form of annotation; and that methods of presenting documents, whether in print or electronically, should provide sound methods of intellectual access to the documents. Members of the ADE value collaboration as a work style and believe that education on both the significance of documents and methodologies is important.

Strategic Objectives

The planning committee identified the following as its most critical strategic objectives:

- A. Improve internal and external communications.
- B. Make the ADE's infrastructure more efficient.
- C. Maintain and increase advocacy on behalf of documentary editing.
- D. Improve the financial health of the ADE.
- E. Increase membership with editors working in varied formats.
- F. Take an active role in educating documentary editors in a wide variety of formats.

For 2008/9, the committee agreed that improving communications (item A) was the top priority and the ADE will take action on items B, C, and D. Each year, the ADE Council will update the plan and make adjustments as needed to strategic objectives and action items.

Action Items for 2008–9

A. Improve internal and external communications

1. Continue *Documentary Editing* as a more substantial annual.
2. Develop an effective e-mail list for use of the Association.
3. Create and publish an e-mail newsletter.
4. Appoint a communications manager and liaisons with various affinity groups. These liaisons will ensure that ADE issues are brought to the attention of affinity groups, often by simple things such as posting on list serves.
5. Collect voluntary information about members to permit greater advocacy and to assist them in fundraising.

B. Make the ADE's infrastructure more efficient

1. Develop process manuals. Too often new officers and chairs end up reinventing processes because of the lack of documentation.
2. Communicate to members about the ADE's activities more often through the e-newsletter.
3. Make Council meetings more productive by using an ongoing planning methodology and regularly review the action plan.
4. Conduct a planning retreat that includes the Council as well as other members in the mid point between Council meetings.
5. Investigate the need for, costs, and possibility of paid staff.

C. Maintain and increase advocacy on behalf of documentary editing

1. Include an advocacy column in the e-newsletter.
2. Create plan for advocacy succession, mentoring, and future activities.
3. Ensure that the ADE is represented at board meetings of key advocacy allies as well as NHPRC meetings.
4. Place advocacy instructional material on the ADE website.
5. Improve grassroots advocacy through internal committee and phone tree.

D. Improve the financial health of the ADE

1. Encourage members to join at a higher level.
2. Reassess dues structure.

Action Items for 2009-13

Additional items for Objectives A-D were identified at the retreat, and action items will be developed for Objectives E and F. The Council will assess progress on objectives on a semi-annual basis and make adjustments as needed.

Planning the future of ADE, June 12–14, 2008, Madison, Wisconsin.



Michael Stevens, Helen Deese, Beth Luey, and Martha King



John Lupton, Sue Perdue, and Charlene Bickford



Kent Calder, John Fierst, and Mary Gallagher



Jennifer Stertz, Cathy Moran Hajo, Lisa Francavilla

2008-9 ADE ACTION PLAN

| Strategic Objective | Action/Agenda Item | Specific Steps | Timing | Responsible Parties |
|-------------------------|--|---|--|---|
| | 5. Investigate costs and processes for paid ADE staff | Appoint committee to determine options for hiring part-or full-time director; develop job description and cost analysis; report | October 2008 | Hajo |
| C. Advocacy | 1. Advocacy column in newsletter | Update provided | Ongoing | Bickford |
| | 2. Create committee to plan for advocacy succession and future activities | Locate potential successors via nominations and volunteers; New Committee chair works with candidates and delegates C.4 and 5 tasks to them and determines those that should be mentored as possible successors | ID candidates Dec 2008; work with Bickford Spring 2009 | Hajo; Bickford |
| | 3. Ensure ADE rep attends board meetings of key advocacy groups (e.g. NCH) | Provide estimate of travel costs to treasurer and include in FY 09 budget | September 2008 | Bickford and Lupton |
| | 4. Place advocacy instructional materials on web | Review existing materials from other organizations; provide links; add connecting materials | Draft by Spring 2009 | Advocacy trainees produce drafts under Bickford's direction |
| external communications | 5. Internal Advocacy committee to generate <i>Living</i> as an annual starting in 2009 | Create advocacy phone tree; establish guidelines for | Spring 2009 | Advocacy trainees produce drafts under Committee |
| | 2. Develop an e-mail list and establish guidelines on use | Format and keep up to date the e-mail list | By June 30 | Lisa Francavilla and next Secretary |
| | | Establish use guidelines | By July 8 | Stevens and Hajo |
| | 3. Create e-mail newsletter | a. Create processes; recruit editor(s); identify costs | By August 15 | King (chair); Fierst, Francavilla, Hajo, Perdue, Stertzer |
| | | b. First issue e-published | By 2008 annual meeting | E-news editors |
| | 4. Communications liaisons with affinity groups (called communications committee) with chair coordinating activity | Develop plan for how a liaison project would work and what responsibilities a communication manager would have | Report to Council at annual meeting | Deese and Gallagher |
| | 5. Establish method of gathering information on members | Identify what information would be useful to know about members and suggest low cost means to obtain | Report to Council at annual meeting | Francavilla, Lupton |

July 17, 2008

2008-9 ADE ACTION PLAN

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| | 5. Internal Advocacy committee to generate phone calls | Create advocacy phone tree; establish guidelines for implementing | Spring 2009 | Advocacy trainees produce drafts under Bickford direction |
| D. Financial Health | 1. Encourage members to join at higher level | Implement matching gift program (Note an anonymous donor has enabled to implement) | Fall 2008 | Stevens |
| | 2. Reassess dues structure | a. Develop case statement for higher dues; finalize at planning retreat | Summer 2009 | Hajo; Committee working on B.5 |
| | | b. Present to members in Fall 2009; e-News | October 2009 | Hajo |