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## ADE Annual Meeting, Washington D.C., 1-3 November 2002 Report

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# ADE Annual Meeting

Washington D.C., 1–3 November 2002

## Special Open Conference: Looking Forward

1 November 2002

Reported by Elizabeth Dow

In light of the impending completion of many of the flagship documentary and textual editing projects, the leadership of the Association for Documentary Editing (ADE) called a special half-day conference to discuss the opportunities and challenges associated with these projects' closing. After a greeting by President Mary-Jo Kline and a brief scene-setting address by Charles Cullen, the program consisted of three segments. Each segment had two speakers charged with delivering brief, thought-provoking observations on the topics of "Reaching New Audiences," "Using New Media," and "Setting the Agenda" to inspire reactions from attendees.

### Opening Remarks

Charles Cullen, Director of the Newberry Library in Chicago and a commissioner on the National Historical Publications and Records Commission (NHPRC), used the themes of Treasury, Technique, Technology, and Time (with nods to teamwork, trials, and tribulations) to frame his remarks.

Time and Treasury: Cullen recounted a history of the development of modern documentary and textual editing, noting particularly that the first of the modern editors, Julian Boyd, a Princeton librarian, had hard-money support for his project by virtue of his recognized institutional status, as did most of the projects begun in the middle of the twentieth century. As the century drew to its end, however, more and more projects depended on soft money, much of it from government agencies. Now only eight of the first twenty-five projects funded by the National Endowment for the Humanities (NEH) and NHPRC remain active, and they will conclude soon, freeing money for use in as yet undetermined ways.

Technique and Technology: Cullen traced the maturation of the profession through the emergence of standards for best practices in the 1970s and computerization of the publication process over the past twenty years. He noted the profession's currently growing awareness of the potential value of the Web as a medium for dissemination, even in the face of the Web's relative immaturity and instability.

That brought him back to Time, and he raised the point

of the conference: where do editors go from here—what should they do, and what should they plan for?

### Reaching New Audiences

Beth Luey (ADE President-elect) observed that today editors can deduce from publishing market numbers that documentary editions have an audience outside the academic world. Sales figures show an appetite for editions based on a narrative or theme—editions that tell a story of one or many people, of the famous or obscure. If, she claimed, the story makes gripping reading, people will read it. She pointed to broad-ranging collections based on a single subject or era that have found market success, as well as abridgments of larger editorial projects. She also noted that highly successful popularizers of history like Stephen Ambrose and David McCullough have credited documentary editions as invaluable for their work.

Given that success, however, she noted three issues and questions:

None of the above can happen before the documentary editor has done the work. Does that mean that projects should factor a shorter, more popular work, into project plans?

Who should put together these popular editions? Should editing projects use their time and treasure? In the case of a shorter work which uses documents from many projects, who should pull them together and who should pay for the work?

If done well, these shorter works require a repetition of the whole editing process, from selection to indexing, with a new set of readers in mind; editors cannot instantly extract these works from extant volumes. Where will they find the treasure to do that work? Should funding agencies shift their focus to fund it?

Carol Faulkner (SUNY Geneseo) related her use of primary materials on the Web in her American history classes. After observing that her students find primary documents fun to work with and she finds them full of value as teaching tools, she asserted that "short editions for classroom use are attractive to publishers." She urged editors who would do short volumes to find out what subjects or themes have appeal to either survey or specialized classes. She too raised the issue of whether the original documentary editors should edit the popular version. After praising the value of Web-

based editions, she acknowledged that mounting a collection raises fundamental and complicated questions of framing the collection—by theme, chronology, personality, etc.

Comments from the participants immediately picked up on the thread of the value of popular editions and raised issues associated with it. Esther Katz (Margaret Sanger Papers) expressed her frustration at publishers' unwillingness to gamble on a new version of old material. Allida Black (Eleanor Roosevelt Papers) encouraged projects to develop curriculum support materials which can serve to sell the idea of a school-friendly small edition. She suggested selling smaller editions the way you sell a trade book. Cathy Moran Hajo (Margaret Sanger Papers) observed that a simple sheet of curriculum ideas they developed for their web site had sparked a lot of interest. Paul Israel (Thomas Edison Papers) suggested editors reach out specifically to teachers of courses that could easily incorporate project materials and work with them to develop thematic packages for use in the classroom. Going back to Cullen's "T" themes, Beth Luey observed that teamwork could mean working with teachers to create collections they want and working with publishers to provide what they want to publish.

Leslie Rowland (Freedmen and Southern Society Project) suggested a grant-funded program to bring teachers into editing projects. Teachers could educate editors through suggestions to make the projects' work more useful in the classroom. Editors would provide teachers a more personal understanding of the work of editors and the treasures available through editions. Paul Israel observed that New Jersey already has such an initiative called "Electronic New Jersey" to put the history of New Jersey online. Doug Arnold (NEH) indicated that the NEH has programs that could fund the ideas raised in the meeting. Beth Witherell (Writings of Henry D. Thoreau) suggested a session with educators at next year's meeting.

### **Using New Media**

Cathy Moran Hajo observed that the Web erases many of the physical constraints of space imposed on printed volumes. She also pointed out that whether aiming for print or electronic publication, the role of the editor doesn't change—providing documents for the reader in as complete and accurate a way as possible. With that in mind, she suggested a number of hyperlinked and multimedia enhancements editors can provide on the Web, but also noted that the fixed sequence of materials a book imposes on materials and the use of page numbers for indexing concepts disappears on the Web, causing navigation and intellectual access problems. She then acknowledged that disciplines outside documentary editing offer insight into solutions to these problems.

Hajo then recounted the basic standards developed by the ADE's Committee on Electronic Standards (CES) and the results of a survey of Web-published historical documents CES made. She reported that those sites not originating from the documentary editing community generally failed miserably to meet the most basic standards of accuracy, conceptualization, and openness about the process that created the site. She concluded that the challenge lies in educating users to evaluate their sources and in developing "partnerships with those libraries and archives that are already mounting historical and literary materials on-line, to work together creating a future where the quality of the texts is the measure of the quality of the website."

Ken Price (Walt Whitman Papers) observed that digital projects have blurred the roles of scholars, graduate students, librarians, editors, and publishers. He noted that editors still have the complexity of the raw materials to work with, and that they must now also deal effectively with rapidly changing hardware and software in "a time of great uncertainty about roles—about who is to do what—and even about the appropriate scope of scholarly editions." As editors start building new collaborations that will lead to more accurate scholarly editions in the new media, Price urged them to remember that such projects remain fundamentally experimental. He urged that editors document themselves "relentlessly, to explain what we're attempting and why."

Comments from the participants immediately supported the suggestion to reach out to other professions. Elizabeth Dow (School of Library and Information Science, LSU) encouraged editors to contact archives educators and ask them to include an awareness of documentary editing in their basic classes. Peter Wosh (NYU) seconded that position. Arnita Jones (American Historical Association) pointed out that the History Cooperative wants to put primary materials online and encouraged editors to talk to them. David Nicholls (Modern Language Association Center on Scholarly Editions) observed that the TEI Consortium has a book on textual standards under way that should provide guidance—due late 2004.

Charles Cullen observed that if editors don't do this work, others—less qualified—will. Ted Crackel (War Department Papers) observed that image editions exist and need standards to guide their creation. Cathy Hajo agreed.

Ann Gordon (Stanton-Anthony Papers) observed that a few years ago it seemed that the NHPRC would support electronic editions for exactly the reason that Cullen had put forth. She has found that commercial publishers wooing a project appear seductive because of their money, but that they balk at supporting the standards editors set, even after they recognize them.

Esther Katz wondered what editors could do to vet the materials already on the Web. Bob Rosenberg (formerly of the Thomas Edison Papers) opined that Katz had suggested an impossible project. He expects to see aggregations of good sites develop and the public sorting through the good and bad for themselves. Beth Witherell recalled a recent piece in the *New York Times* [Markoff, John. "Business; A New Company Tries to Sort the Web's Chaos." 27 Oct. 2002, sec. 3: 4.] describing a project to organize the Web. Bob Rosenberg observed that the project Witherell had mentioned depends on metadata. He then raised the question of whether editors should become very sophisticated about search engine algorithms and skew project presentations to appeal to them. He observed that people want accurate and authentic information, and editors must figure out how to get it to them.

Cathy Hajo argued that editors must educate students and readers about what's good and should also actively challenge the "publishers" of bad stuff. She further suggested that ADE might develop a section on its web site specifically for teachers and students, including the ADE standards, with information on evaluating published historical documents.

John Sears (Eleanor Roosevelt Papers) supported the notion of opening a greater dialog with teachers in response to a growing number of state standards requiring students to use primary documents. He suggested editors should teach teachers to evaluate the primary documents they find on the Web.

Mary-Jo Kline (John Jay Papers) observed that editors and librarians have dealt with lots of bad stuff in the past. She urged that editors keep their focus on what they do—publish documentary editions. She observed that the only thing new about the new technology is the new technology. It causes editors to do what presses used to do in terms of markup, but she expressed the faith that the profession will figure out how to work with that.

Esther Katz recounted having tried to do an edition about Sanger, not of Sanger, and the opposition the idea met. She observed that editors still need to figure out how to sell what they're doing and to keep doing it to show that humanities matter.

Beth Luey observed that after 9/11/01, people turned to the humanities to find comfort and insight. She suggested that the editors' agenda for the twenty-first century should be to stay put and continue to do what they do well.

### **Setting the Agenda**

Sue Perdue (Jefferson Papers-Retirement Series) focused on aspects of working on a project funded by a foundation—the Jefferson Foundation. She observed that the foundation

provides the project with secure funding and planning support, and the project provides the foundation with both scholarly credibility and scholarship to apply to other aspects of its work. But the foundation expects the editors to greet visitors when needed. Their project does not work in the relative obscurity of most projects, and they find themselves educating not only visitors about what they do, but also staff of the larger foundation. Further, as the fortunes of the foundation rise and fall with the stock market, to some degree their security follows.

Joel Myerson (Ralph Waldo Emerson Papers) added the "T" for Trouble. He asserted that "editors are under siege as never before" citing the loss of funding by historically supportive government agencies, loss of interest by university presses, and the loss of status as the humanities become marginalized in the corporatization of the university where sciences act as the cash cow. He further observed that today editors work in an era when the "national political administration ... believes that culture and knowledge are dangerous." He advised that editors need to rethink editing. "Most of the talk today has been about delivery systems" as editors do less editing and more work for the technology.

Comments from the participants came more slowly than they had for the previous two topics. Allida Black asserted that if editors think the agenda has been taken from them, they must take it back. She proposed promoting messages from project texts which relate to issues of the day. Carolyn Howe (Abbey Kelly Foster) questioned how to convince funders that humanities matter, and as an obvious population suggested people who work in education.

Beth Witherell argued that editors are actually sticking to the agenda by doing their editorial work. Though they do understand the contextual threat to their work, editors just keep at it.

Charlene Bickford (Papers of the First Federal Congress) suggested editors needed to reach out to archivists and seek more visibility by working with groups supporting federal agencies. She encouraged active lobbying on Jefferson Day and making presentations of works to congressional delegations. Jessica Jones (National Humanities Alliance) ended the comments and the morning's gathering with an announcement of a two-day Jefferson Day series of workshops of demonstrations and training in lobbying for the humanities and encouraged editors to get involved.

## Annual Meeting Session Summaries

Compiled by Editorial Staff

1 November 2002

### Lunch

Henry Wiencek (Virginia Foundation for the Humanities), author of *The Hairstons: An American Family in Black and White*, described how documentary editions and archival collections had been essential to him in writing that book and in his current project, a biography of George Washington. He also thanked editors for the help that they had personally provided in his research.

### Opening Session (Mount Vernon): Editions at Work

Philander D. Chase, Papers of George Washington, Chair; William L. Beiswanger, Thomas Jefferson Foundation; Travis McDonald, Poplar Forest; Dennis Pogue, Historic Mount Vernon.

William Beiswanger discussed the restoration of the gardens at Monticello and noted the differences between idea, intention, and reality. Although very few structures remain in the garden, notes, often conflicting, exist as to how it should be laid out. The choice as to which notes to use for recreation and restoration of the gardens depends on precedence.

Travis McDonald described the restoration of Poplar Forest, Jefferson's retirement home, and the use of objects as documentary, physical, and prototypical evidence in recreating the structure. Even with physical evidence, intent cannot always be determined.

Dennis Pogue discussed the farm at Mount Vernon which is considered a working or authentic farm complex. The polyangle-sided shape of the barn was determined by using archeological findings from the original site.

2 November 2002

**ADE Breakfast. See Bruce Cole's Address** (p. 89)

### Going Public: Three Publishers on the Edition

Kenneth Price, University of Nebraska-Lincoln, Chair; Greg Britton, Minnesota Historical Society Press; Mick Gusinde-Duffy, Electronic Imprint (EI), University Press of Virginia; Michael Jensen, National Academy Press.

The session was a lively demonstration of current fluidity in the field of publishing, ranging from experiments with great potential for capturing new and wider audiences to necessary accommodation in a difficult and unstable market. The three presenters each called for compelling visions in

publishing and the use of creative partnerships to translate those visions into reality.

Greg Britton in "Defining Success in Scholarly Publishing" noted that there is a broader audience for documentary editions than the traditionally narrow group of academics. Colleges and secondary schools use editions in teaching and public figures rely on them to better understand historical documents such as the Constitution.

In discussing "The Electronic Publishing Petri Dish," Mick Gusinde-Duffy made a case for electronic publishing. Such experimental ventures as the University of Virginia Press, Electronic Imprints, are largely grant-funded, which makes it imperative to figure the costs of electronic publishing not only for the recovery of expenses but also to be able to make realistic projections for the cost of future endeavors.

Michael Jensen in "Open Access Models: Succeeding by Giving Away the Store" commented on the role of umbrella organizations, like the National Academy, in undertaking very specialized forms of publishing, thereby setting certain standards of procedure, performance, production, and dissemination.

### Resources for the Future

Catherine Kuncie, University of Denver; Allida Black, Eleanor Roosevelt Papers, George Washington University; John Kaminski, Documentary History of the Ratification of the Constitution, University of Wisconsin-Madison; Roger Bruns, NHPRC.

Allida Black spoke of "Becoming a Venture Capitalist for Eleanor." She described her constant efforts at fundraising for the project, paired with ways for teaching the broad public what a documentary edition is, which includes showing a wide range of people how to use books and access materials of compelling interests to them.

John Kaminski also discussed the need for continuous fundraising (even in retirement homes) in "The Want of Money Cramps Every Effort': Funding a Long-term Project." Ongoing projects best explore all kinds of fundraising opportunities, which means in most instances close cooperation and coordination with the development officers at the home institution and devising creative ways for finding friends and transforming them from potential into active supporters.

Roger Bruns made a case in his talk, "In Search of the Fountain of Funding," that fundraising starts with research and suggested that the ADE could act as a clearinghouse for fundraising for scholarly editions—a suggestion, involving

questions on the use and usefulness of partnerships, that engendered considerable debate.

### **Blazing Trails: Scholarship beyond the Edition by Editors**

Conrad E. Wright, Massachusetts Historical Society, Chair; Charles F. Hobson, John Marshall Papers; William M. Ferraro, Ulysses S. Grant Association; Carol DeBoer-Langworthy, Brown University.

In his talk, "Is That Footnote the Whole Story? Laretta Hitchcock, Salmon P. Chase's Classmate and Youthful Love, Becomes Laretta Hitchcock Jenney (1808–33)," William Ferraro discussed some of the challenges that face documentary editors who want to pursue questions of scholarly interest that fall outside of the parameters of the editorial projects on which they serve as full-time staff members.

Charles Hobson in "The Editor as Scholar: In and Beyond the Edition" made a case for emphasizing the role of documentary editor as expert and scholar. Such scholars undertake work "external" to the more narrowly focused editions and contribute importantly to the mission of the project. This redefinition of the scholar and editor role calls for salaries at levels that allow for such independent research.

Carol DeBoer-Langworthy described her research into the background of the subject of a memoir recorded in the early part of the twentieth century in "Reprinting HARRY: Added Value in an Editing Project." She argued that her specific experience as editor and researcher allowed her to write a monographic historical narrative that posed new questions and that reached a broad audience.

### **Annotators' Tales**

Barbara Oberg, Papers of Thomas Jefferson, Princeton University, Chair; Ann Gordon, Stanton/Anthony Papers, Rutgers University; James L. W. West III, Pennsylvania State University.

In "Is There a Story in those Notes?" Ann Gordon discussed the dichotomy of restraint and superficiality in using historical research in annotation. Annotation can change the way things are written and fill in the gaps created by selection of documents. The editor's goal should always be to preserve narrative while deciding whether to look outside the text and let other voices speak.

James West asked, "Annotating for Whom?—and for How Long?" He spoke about the issue of names in documents, how many to identify and at what length, and posed ques-

tions related to the shelf life of editions, how much explication is really needed, and the cultural differences that exist which affect annotation. West pointed out that notes do not create narrative.

**Business Meeting.** See "Business Meeting Minutes" (p. 107).

### **3 November 2002**

#### **The Written and the Spoken**

Donald Ritchie, Senate Historical Office, Chair; Susan E. Gray, Arizona State University; Susan Englander, Martin Luther King, Jr., Papers Project, Stanford University.

In "North Country Stories: Written and Oral Texts of a Family History," Susan Gray focused on thematic issues that had grown out of an editing project. Arguing that place is text and lived experience, her tale of missionaries and Indians in northern Michigan began in the nineteenth century with a set of husband and wife diaries. In the third generation, written texts gave way to conversations with and among descendants with varied narratives of self and place.

Susan Englander, filling in on short notice for Clayborne Carson, used the example of the earliest extant audiotape of a sermon of Martin Luther King Jr. (1954) to discuss the challenges of editing the spoken word. Since sermons—spoken words—are central to King's message, she concluded her presentation "Editing the Recordings of Martin Luther King Jr.," with excerpts from the original tape recording.

#### **The Past is Prologue**

Ray Smock, Robert C. Byrd Center for Legislative Studies, Chair; David R. Chesnutt, Papers of Henry Laurens/Model Editions Partnership, University of South Carolina at Columbia; Daun van Ee, Manuscript Division, Library of Congress.

David Chesnutt described the final months of the Laurens project in "Winding Down: The Final Challenge." He noted problems such as the departure and retooling of key staff, the difficulty in finding funding to complete the cumulative index, and making arrangements for the archiving of conventional and electronic project materials.

Daun van Ee discussed the ending of a different project in "Our Revels Now Are Ended: The Not-So-Tempestuous Conclusion of the Eisenhower Papers." In this tale of wrapping up, the emphasis was on difficulties tied to imposed tight deadlines and complicated contractual arrangements with supporting institutions and organizations.