Documentary Editing in the New Scholarly Ecosystem
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Susan H. Perdue

I want to start by telling you a cautionary tale based on my own experience. I am hoping that through the telling of this story I will emerge from the process a braver and stronger person; I am hoping that at the end of this talk you will also emerge braver and stronger people, and that you will share with me a sense of the importance of the task we have before us. I think the time is at hand for those of us gathered here tonight, and for all of the ADE membership to take control of our collective futures.

At the Virginia Foundation for the Humanities where I direct Documents Compass, the program directors undergo an annual evaluation. This process entails counting the number of people each program reaches through a direct audience (such as a lecture), or a mediated event (such as a radio broadcast). We then take the overall cost of the program and divide it by our total audience, thus resulting in a cost quotient for the program. I have never participated in this kind of evaluation before. You can probably guess that this annual exercise gets my colleagues really exercised. Not surprisingly, they protest because they believe we are comparing apples and oranges. During these often-heated discussions I take a low profile, because my own cost quotient is so high. I am unsure of my ability to explain this cost to them because what we do is so unfamiliar to them. We are not producing radio shows for hundreds of thousands of listeners, nor are we putting

on an annual book festival for thousands of out-of- town visitors, both of which are activities sponsored by the Virginia Foundation. We are neither fish nor fowl, apple nor orange. It is very difficult for me to quantify or assess the impact and outreach of what I do, but I should be able to express to them the *importance* of what I do.

The work I do nowadays is part documentary editing, part consulting, and part project management. Although this is different from what I used to do as an editor of a documentary edition devoted to one person, I still hold fast to the basic tenets of our profession. These are making documents accessible and understandable, providing those documents with a level of authority and trustworthiness, and making them the building blocks of scholarly products that will stand the test of time, whether they are destined for bookshelves or online.

I know that the pursuit of these goals in documentary editing does not come cheap. I know that our work is labor intensive and careful, and there is a cost involved. Yet, when faced with my cost quotient each year, I become a tad nervous —a bit fearful. I fear that the process of explaining this situation is too complicated or too time consuming. What saves me from having to do any of this is that my quotient is also factored by the uniqueness of the program, and thus I am saved for another year. If I were to hand out advice to myself in addition to handing it out to you tonight, I would say that I am missing a valuable opportunity each year to educate the folks that I work with about what it is that I do. I promise I will do better next year. See, I am already braver and stronger.

I am taking the opportunity I now have to use my personal experience as a way to illustrate what I see as a similar behavior pattern within the profession of documentary editing. I think that too often we shrink from defending the process and product of documentary editing, allowing the conversation to be overtaken by others putting antiquated editions online, or simply inadequate editions on line. What truly concerns me now is the pervasive sense that we as a profession might be overwhelmed by the forces of change. It feels as if we are a profession in crisis. But are we? That is the question I would like to investigate briefly in my talk. I do not propose to offer solutions here, but rather suggest a strategy for coming up with some solutions as an organization. I think that this is a bigger task than ADE alone can accomplish. I believe that what is needed is a larger initiative

that expands our borders beyond the comfortable and manageable territory we call documentary editing.

Over the last thirty years ADE has faced repeated crises in funding. We find ourselves in the same situation year after year fighting a familiar battle—an experience Ray Smock likened to the movie *Groundhog Day*, wherein the protagonist played by Bill Murray awakens each morning to relive the same experience of the same day over and over again. Certainly we have matured as a profession, and as an organization we are moving ahead on several fronts. Yet, we are fighting for funding levels that are reminiscent of the 1970s.

Meanwhile, the monumental shift in publishing from print to digital is having an enormous impact on documentary editors across the board. The pressure from users, funders, and even sometimes publishers to respond to this shift has added one more burden on the shoulders of editors. Exacerbating this situation is the fact that funders, facing their own pressures, are linking financial support to digital publication. The result is that everyone feels that they are in a perpetual crisis mode, moving from one defensive posture to another. Expectations are constantly changing. Technology is rapidly evolving. Many editors are feeling personal and project-level stress. What is an editor to do, or more precisely, what are we to do as documentary editors? How do we see this as anything but a crisis?

Let's stop and take a collective breath and survey the landscape. We are not alone. Funding organizations and academic presses are experiencing the present in much the same way. It is pretty obvious what is happening to funders in the current economic climate. Money is tighter and therefore funders are under extreme pressure to fight for level funding, and lucky to get even that. Academic presses are undergoing similar stresses: a decline in print revenues coupled with a push for open access.

I propose to you that we see documentary editing not in crisis but as experiencing tectonic-like shifts within a larger scholarly ecosystem that we share. All of us are facing a new landscape of scholarly communication in which it is imperative that we each stake our ground. We should make clear what it is we do best and why. Facing this situation, I think we are wise to study the example of our colleagues in academic publishing, namely the American Association of University Presses. This year the AAUP formed a task force to prepare a report entitled "Economic Models for Scholarly Publishing." The report begins by presenting an

overview of the publishing systems that are, in its words "worth protecting and
retaining throughout this and future periods of transition."[1] The task force goes on
to summarize the central role that academic publishers have played in the scholarly
ecosystem. I will highlight here a few of the services they identified: selectivity,
editorial engagement, imprimatur, and long-term availability, among others. The
remainder of the report looks at new approaches to scholarly publishing and some
suggestions of new business models. I am struck by the parallels between what the
task force states as worth protecting for academic publishing, and what I think is
worth protecting in documentary editing.

As a profession, we too must take this critical first step. We must demonstrate
that we are not in crisis but rather we are strong and constantly creating new
scholarly content that is rich and varied. What we do has virtue. Now more
than ever it is incumbent upon us to identify and actively promote the best
characteristics of scholarly editing—to demonstrate our virtues—especially in the
new "hyperabundant landscape," a phrase used in the AAUP report to describe
this new world. We now have to think about reaching and interacting with an
audience, the size and scope of which we never could have anticipated twenty-
five years ago.

So let me review for you what we already know: the features of documentary
editing that make it unique, important, and virtuous. You will of course be able
to think of some more, but I will limit it to three main categories.

Number one: Accessibility

The primary objective of every documentary edition is to make documents
accessible to users. Whether in print or digital format, this means that every
document is presented in a uniform fashion according to consistent transcription
rules and standards that are clearly stated to the end user. The inclusion of indexes,
tables of contents, and prefaces are the typical devices that lead scholars and users
of all stripes to the documents. We make documents accessible in ways that go
beyond text searching alone.

Number two: Expertise and authority

An editor's familiarity and comfort level with the material is key to the documentary edition. His or her expertise guides the process of selection and annotation, both of which confer authority to the finished product. While they work, editors keep in mind a sense of the larger document corpus that they work from. They can recall similar documents. They can recognize recurring themes or verbal quirks. Most importantly, they recognize defining moments in documents. Although we may not agree about levels of selectivity, my hunch is that everyone in this room believes in his or her heart that he or she is the best judge of what each document requires in the way of explanation. You have the greatest ability to identify forgeries and misdated documents, for example, and you know it. This is the true strength of the profession. This is why, whether a document is transcribed by you, your most gifted graduate student, or produced via crowdsourcing, ultimately, you will bring your expertise and experience as an editor to bear on this document. Let's make this point at every opportunity. Authoritative documentary editions will never be more valuable than now in the Internet age, during which spurious quotes, renegade editions, and Wikipedia-like half truths will only increase in number.

Number three: Sustainability

The collective assumption of everyone in this room is that the modern documentary editions we produce supersede all editions that have come before them. Indeed, modern documentary editing was built upon this "golden age" premise that the editions begun in the mid-twentieth century and every one thereafter has been built to last for the centuries. In my mind, when we talk about sustainability in the print realm, we are generally talking about putting volumes on shelves in academic libraries. It is in this category that the most dramatic shift has occurred for our profession and where the definitions have truly changed. Sustainability in the digital realm is something quite different than in the print

realm. We now need to think about data curation, data updates, and even data migration. The Model Editions Partnership is a case in point.

I think we will increasingly be asked by funders and sponsors to discuss the sustainability of our editions online. We are now being asked to serve as stewards of our content in ways we never have been before. I think that in order for us to advance as a profession we need to work together to find solutions to this question because our future success relies on it. This will require us to work in new ways.

I began with a tale about my experience in the hopes that it would serve as an example of what not to do. I would like us as a profession to recognize and profess our strengths. We must be ready to explain what documentary editing is: the process, the product, and its costs. We should be able and willing to explain all of these things as a reasonable cost of what we do. But I think we need to do more. We need to think in even larger terms and we need to envision the profession as it will exist in the future. My aim in this talk was to encourage us as an organization to expand our thinking about documentary editing as a single isolated species—or an exceptional enterprise. We are part of a much larger system that includes university libraries, university presses, archivists, funders, editors, and IT professionals. Just as the AAUP did in forming a task force to address its own issues, I think we should define who we are, outline our issues, and suggest some solutions. We should get out ahead of the forces that we believe threaten us and our existence. This will have to be a collaborative enterprise that will involve all of us who are struggling to survive in the new scholarly ecosystem.

Notes

1. The report is available for free online at http://www.aaupnet.org/policy-areas/future-of-scholarly-communications/task-force-on-economic-models-report