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Who are we editing for? How digital publication changes the role of the scholarly edition

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There are three main pillars to creating an edition. First, you need documents that are interesting and important enough to edit. Second, you need an editor(s) with the skills and a plan to publish them. Third, you need an audience who wants to use them. That last part, the audience, I think, is one that we often do not think as carefully about.

Many editors assume that their primary audience is **like them** – that is, a scholar in any variety of disciplines who conducts in-depth study using specialised research libraries. How do we know that? Because we publish most editions as print volumes, which are expensive and usually only available in college and university libraries. In a quick and unscientific search of WorldCat, I looked for well-regarded documentary editions and found none of which were available in more than 2,000 of the almost 20,000 public and academic libraries in the United States. We get the audience that we expect because we publish in a place where that audience thrives.

Other editors see their audiences as little more than a **vague crowd**. I have been guilty of this in the past, promising in grant proposals and elsewhere that my edition will reach the trifecta of 'scholars,

students, and the general public'. We can visualise many individuals being interested in our work, whether teachers, family history researchers, students working on term papers and dissertations or journalists covering a story. In some cases we might do an audience exercise where we draft fictional personas that describe who these users might be and what they might be looking for in our editions. But even then, I think that we focus mostly on scholars and college students.

To be fair, print publication for library use doesn't offer an easy way to learn about our readers. We can look at book sales, but most volumes are purchased by libraries, so we cannot know who uses them, how often they are used or what they are used for. You can search for citations in scholarly publications to track edition use, but that is difficult to do. You might meet some of the scholars or students who used your edition, read reviews if you are lucky enough to get some, or hear from them via email, but the vast majority of our readers remain mysterious.

Ann D. Gordon's *Using the Nation's Documentary Heritage: The Report of the Historical Documents Study* (1992) was charged to investigate and report on the use of historical sources – who used them, how they accessed them, and what users were looking for. I do not think anyone has attempted a similar project since then. Gordon's chapter on documentary editions notes that editions take a long time to prepare and do not reach the shelves of most public libraries. Many editions were produced by state and local historical societies to document local stories while others, many supported by the National Historical Publications and Records Commission, dealt with topics of national importance. Some of the fascinating findings about the use of documentary editing in the 1990s were that they were a well regarded source for researchers and scholars, especially those working in universities. Users found that the reliability of an edition's transcription, the compiling of documents from many sources and the subject indexes were among the most useful features of editions. For documentary film makers, graduate students and biographers, the very existence of an edition often helped them

decide to undertake further research on a topic because they knew that the work needed to personally travel, gather and organise primary sources was too much to undertake.[1]

I think that the results of the Gordon study probably still hold true when it comes to scholars. Access to primary sources has exploded with the advent of digital publication. Scholars can locate archival collections more easily now, as finding aids are posted online and many libraries and special collections have mounted image-based digital archives. Resources like Google Books, Hathi Trust, and the Internet Archive make scholarly books, including some print editions and even some microfilmed editions, more widely accessible. Some editions are also available in digital form using subscription services, like the University of Virginia Press's Rotunda imprint and ProQuest's History Vault.

But editors have been slow to go all in on digital publication. There are good reasons to fear that the digital medium is too ephemeral. Editors worry that, after they have devoted years of scholarly labour to creating something beautiful, it might be vulnerable to being lost due to proprietary software and licences, or incompatibility with technologies that we haven't even imagined yet. We know books; we trust that books and libraries will exist in some form for as long as our species exists. So we may feel that it is safer to stick to what we know, to serve the same small audience, using the same old tools. Eventually, copyright will expire on our print editions and they will become part of digital libraries and fully accessible.

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1   Ann D. Gordon, *Using the Nation's Documentary Heritage: The Report of the Historical Documents Study* (Washington, D.C.: National Historical Publications and Records Commission, 1992) reports on a massive survey of users of primary source materials. See pp. 80–4 for use of editions. This extraordinary study is now dated; indeed, one chapter is entitled: 'Microforms: "Unthinkable to Be Without"', which argues passionately for the medium as a way to preserve primary sources and deliver them to their readers 'at the cost of strained eyes, cramped necks, and stiff backs'. (p. 64).

I don't want to wait that long. If we lean into digital publishing and take advantage of the accessibility that it affords our work, we can make an immediate difference in how people understand the past, and we can do it right here and right now. Scholarly editors make primary sources available to the public. That is our mission. We are different from scholars who primarily write monographs. We give a microphone to the voices from the past, using scholarly research to contextualise them and make them easier to understand.

Digital publication has the potential to broaden our audience dramatically. That means that we need to do some hard thinking about who our main readers might be and what kind of information they will be looking for. It might be as simple as realising that the art of reading handwriting is fading. As students use computers and digital devices earlier and earlier in schools, they have less experience in reading and writing handwritten texts, especially those written in cursive. Any digital representation of a cursive text will be difficult to impossible (depending on the handwriting) for younger readers to understand without providing transcriptions. While many editions provide diplomatic transcriptions, which render all the complexity of a document through the use of encoding or typography, a freely accessible digital edition might consider providing transcriptions that offer clear text that make documents easier to comprehend.

Digital editions that document well-known historical people, events and topics should expect to reach large and diverse audiences. But even digital editions that have a smaller focus, that cover a local topic or a tightly focused event, will find that more and more people are coming to their sites. It is important to think about what different audiences might need to understand the texts. For example, an edition that discusses the American Revolutionary War might add a glossary of terms for non-scholars to help them better understand the context of the texts. An edition that describes local history might include a map to help visualise the places in the texts. An interactive family tree could make a diary or collection of family papers easier to parse. Developing exhibits that highlight the themes in the collection might also help introduce a more casual reader to the edition.

One thing that digital publications can also do is give us a much better sense of how our users interact with the edition. Even with minimal web analytics, editors can get a clear sense of who uses their editions, where those users come from, when they are accessing the site, and which parts they are using. From there, our projects can better determine how to serve those users.

Our experience with the Jane Addams Papers Digital Edition (https:// digital.janeaddams.ramapo.edu/) offers a case in point. We anticipated that college students would make great use of the edition, as well as scholars and the elusive 'general public'. And they have. But the biggest lesson we learned was that K–12 teachers and students are eager for the materials that we provide, if only we meet them halfway. We often received emailed requests for help with National History Day projects and from younger students working on class assignments and projects.[2] In response, we designed a series of thematic guides to help students and their teachers use the Addams digital edition for National History Day. These include a summary of the theme, how Addams fits into it, and a series of subthemes (Child Labor, Social Work, Peace) where we delve in a little deeper and then offer them tools to explore the edition. We also developed some lesson plans for middle school teachers using some similar themes.

Practically since the day that we published them, these guides and lesson plans have been the top performing pages on our website. The current History Day themes are generally at the top, but themes from other years also remain in the top fifty pages. We can tell that they are using the guides as well, because the documents that we highlight in the guides are also the primary sources that are used the most on our site.

2   National History Day (https://www.nhd.org/) is a national contest for middle and high school students in the United States that encourages them to engage students in historical research using primary sources. Students compete on projects ranging from performances to research papers, either as individuals or in groups. Each year there is a broad-ranging theme that is generally easy to fit to any editing project.

What this tells me is that students, especially high school and middle school students, want a curated introduction to the digital edition. These guides tap into something that our eminently searchable digital edition cannot do. They provide a bit of background on the topic that might help a student decide which topic they want to investigate. They offer a few good examples of Addams's ideas on those topics, and then provide links to a canned search that can help them locate additional documents on those themes. They also provide links to some outside resources that students can use for their projects, such as links to photo collections, social history websites and more.

This clear sense of a different audience made us think about how we could better serve them. We have been adding more History Day themes as they are released and have started adding additional assignments and lesson plans. We are currently developing assign-ments for high school AP classrooms through a grant from the New Jersey Council for the Humanities. For this project, we gathered a group of teachers to discuss how they currently teach Jane Addams in AP History, spurring them to think about other ways that we could integrate the topic into their courses. We also held listening sessions with the teachers to understand what they are looking for when they adopt class resources created by others. We are working with educa-tors and teacher education students to build some sample resources.

Another way that you can learn about your audience is to invite them to interact with your edition. Making it easy for readers to ask a question or make a comment can open up dialogues that can benefit our work and forge connections with the public. We offer commenting on all the texts and the biographies of people, events and organisations mentioned in our texts. Yes, we get a lot of spam that we delete before the public ever sees it. But the other inter-actions are instructive. While we do get scholars commenting on our texts, most of our interactions are with ordinary people. The great majority comment on the biographical pages on our site because they are descendants of the people who form a part of our edition. Grandchildren and great-grandchildren, most likely doing

their own family history research, come across our site and often share photographs and biographical information about their people, helping us to build a more accurate and inclusive sense of Jane Addams's world.

One Australian found our work-in-progress biography of his great-grandmother Ida Marie Frankel. He knew that she was in Germany during World War I and had written a pamphlet on peace. He found our site when we published a letter that she had written to Jane Addams in 1922, and started a conversation where we shared historical details and we were able to flesh out her biographical entry.

Some comments just make your day. A student commented on 'Why Women Should Vote', a 1910 article by Addams that was featured in our National History Day Guide, 'This website is like so freakin helpful. I have to do this history fair thang and it's really hard but this helps so much. It's just amazing. Highly recommend using this website. Thank y'all.'

Crowdsourcing is another way to interact with your audience. It is marvellous as a way to engage people with our texts. Volunteer transcribers read the texts carefully, get thinking about the content and get engaged in the ideas. I don't think that it can replace the careful and professional work that editors do, but it can provide first draft transcriptions, enable us to build subject tags for large groups of texts and build a following for an edition.

Thinking about how digital publication has changed our audience has made me think harder about the ways we edit. When I think about the process of selection and curation of a small set of wonderful documents, I still find it an extremely valuable process and product. But with the capacity of digital editions, my inclination is to publish the larger collection of texts and create selected group-ings using metadata. Building many ways to slice and dice the edition by subject, person, date and place will empower the user to engage with the collection in a far more active way. For those users who

want a guided walk through the collection, digital exhibits that focus on an issue, a place or a story and provide links to the documents that best cover it might replace in some cases the creation of selected print editions.

When I think about transcription in a digital edition, it is less important to me to try to render the words exactly as they appear on the page. We can provide an image of the original that should satisfy the scholar who is interested in the creation of the text, the false starts, the struck out words, and the interlineations. But a large percentage of our audience won't look at the image; they only want the transcription because they can't read cursive. They are looking for the content, finding quotes to use in their papers or seeking information about specific events discussed in the documents.

The other main function of the transcription is to serve as a searchable text. Those searches can take place within the edition, but they are far more powerful when they bring people to our editions from the Web. Search engines drive people to our editions because they are looking for a string of words that appear in our texts. This kind of discovery is where we want to be – when a researcher locates an edition that they would not necessarily have thought of using for a project. To reach these hidden users we need to consider how our transcriptions play with search engines, which might mean rethinking how we render misspelled or variant spellings of words, and abbreviations.

We may also need to rethink annotation. When you work with a digital edition, most likely the Internet is just a tab away for your reader. How should this change the way that we annotate our texts? There is something to be said for having an edition that is complete in its own self – that does not rely on external links. This is the case when we work in print, most of the time. We try to build a research tool that is all in one. You should not have to get up from your desk to conduct research so that you can contextualise a document. Footnotes have long been the tool we use to provide missing context and mysterious parts of the text.

That is still the inclination, even when constructing a digital edition. There are a few issues – you might not be able to trust that external links will always be there. Even as hyperlinks can make an edition extremely useful and easy to navigate, link rot is a real problem for the longevity of a digital edition. Editors might also fear that by sending users away from their site to consult a resource, they might lose them, as we all know how easily we can fall down another research rabbit hole.

I guess the question is do we need to do the same kinds of annotation when we edit digitally? At the Jane Addams Papers, we have opted to develop descriptive entries for people, organisations, events and publications that the texts mention. These are linked logically (for example, a letter might be written by a person, be received by a person or mention a person). We try to keep the descriptive entries short, focusing on how the person interacted with Addams and her organisations. In the cases of famous people, we provide less about their general life and activities, as that is widely available elsewhere, but do spend more time on people who do not have Wikipedia pages and are not very easy to find. By doing this, we uncover the many hidden workers in the social work, woman suffrage, child labour and peace movements, providing a more robust sense of Addams's networks.

The nature of annotation changes when we create a digital edition. It broadens to include metadata, glossaries, data visualisations, maps, exhibits and other kinds of data and links, all of which make the documents easier to navigate and easier to understand. We have to think past the ways we have written annotations in the past. We may lose some specificity in annotation when we treat this task in new ways. We cannot annotate 25,000 documents in the same style that we do 125 documents in a print edition. It takes too long, costs too much and not all documents warrant that treatment. However, if the challenge is to annotate 25,000 documents, we need to rethink how to achieve our goal – to make the texts accessible and understandable. That might be through developing detailed subject indexes or creating glossaries of terms, individuals,

organisations, events or themes that relate to the texts, or building out descriptive metadata whose searches allow users to more fully interact with the digital edition. We can appeal to our different audiences by offering different kinds of intellectual tools that meet them where they are.

Opening our editions up to the whole world via digital publication creates challenges and opportunities for editors. We have to think through how to make our documents accessible not just in terms of open access, but also in making them understandable to scholars, teachers, students and the public.