Public Report
on the
Association for Documentary Editing’s
Institutes for Historical Editing Project
2017-2019

(NHPRC Project DE-50002-16)

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Introduction

In August 2016, NHPRC (National Historical Publications and Records Commission) informed the Association for Documentary Editing (ADE) that it had received a grant award for 2017-2019 to promote scholarly editing through training and education programs, including

1. three annual Institutes for the Editing of Historical Documents (IEHD),
2. Advanced Seminars on Critical Issues,
3. Collaborative Workshops with other groups, and
4. an expansion of the ADE’s Education webpages.

Building on the long history of the IEHD since its founding in the 1970s, over the last three years the ADE has introduced and trained well over 100 new and emerging editors from a wide range of fields and coming from diverse academic and professional backgrounds, fostered discussion and collaboration on some of the most pressing issues and latest advances in the field, developed and expanded our curriculum, updated and added new features to the ADE website, and honed our teaching and presentation methods to respond to the feedback collected from contributors and participants.

As the current grant project comes to a close, the ADE is poised to continue its work to expand the reach of its education efforts with new collaborative programming, online courses, and additional educational resources for editors and publishers of historical documents. The updates to the ADE Education pages completed during this grant period, including a FAQ for those considering new projects, will be used as the basis for a larger online presence to be developed during a subsequent grant project (2020-2021).

This report describes the work accomplished during 2017-2019 grant period and draws some of the lessons learned in the process that may be of use to future ADE Education efforts and others engaged in the promotion of scholarly editing.

Project Team

After much deliberation among the ADE Council, the IEHD Advisory Board, the NHPRC, and past IEHD faculty and participants, a search for a new ADE Education Director was launched in December 2016. The search committee consisted of Paul Israel (chair), Beth Luey, Silvia Glick, Jeff Looney, Amanda Norton, Pamela Pierce, and Jennifer Stertzer. After reviewing applications, the committee announced to Council, the NHPRC, and the ADE membership that Nikolaus Wasmoen had been selected as the new Education Director, which position Wasmoen has held for the remaining duration of the grant project (February 2017-December 2019). Members of the IEHD Advisory Board during the grant term included Jennifer Stertzer, Cathy Moran Hajo, Patrick Lewis, Jennifer Steenshorne, and Pamela Pierce. The ADE Education programs have also been led by recent and current ADE Presidents Jeff Looney, Paul Israel, and Ondine LeBlanc. Elected or Acting ADE Treasurers Sara Georgini, Silvia Glick, and Ondine LeBlanc generously donated their services in support of the grant project through accounting, payment processing, and financial reporting. Erica Cavanaugh, ADE Webmaster and frequent faculty contributor, provided technical support and web development, as well as managing social media. Kathryn
Blizzard, a graduate of the 2017 IEHD, consulted on the grant project’s communications and outreach strategy. Previous ADE Education Directors Beth Luey and Robert Karachuk consulted and served as members of the Admissions Committee and Grant Re-application Committees, respectively. In addition to these core team members, many other individuals have also contributed through partner organizations, planning meetings, and the local organizing committees for the ADE Annual Meetings in Buffalo (2017), Olympia (2018), and Princeton (2019), as indicated below.

The largest group of contributors to these projects have been the faculty and students, who are recognized below in discussions of given events. We believe that one of the most significant accomplishments of this grant project has been to foster community and conversation among scholarly editors spanning fields, disciplines, periods, and points in their careers. As the need for increased communication and collaboration among editors in the digital age has been made clear by developments in the field and the launching of collaboration-focused initiatives by scholarly and professional organizations, as well as by granting organizations including the NHPRC, we feel that this community-building work has become more important than ever and wish to thank all of those who have contributed their expertise, time, and effort to our shared goals of helping editors to be able to make historical documents and records more widely available and accessible. In hopes of helping to realize a growing and self-sustaining scholarly editing community over the long term, we plan to continue to draw heavily on the communities of editors constellated by the ADE’s recent education programming as contributors and participants for future programming.

Developing the ADE Curriculum and Programming

For each workshop or seminar event held during the grant period, the planning and evaluation process followed a similar pattern. In the lead up to the first IEHD, for example, the current Education Director consulted with the Advisory Board, recent faculty, and the ADE President to identify resident and guest faculty to invite. The Education Director used the previous years’ materials provided by the former Education Director to create a draft block schedule of discussion and break out sessions covering all of the main topics related to conceptualizing, implementing, maintaining, and funding a new editorial project. In consultation with resident faculty, both individually and as a group, these lessons were then assigned to specific faculty or faculty teams based on their experience and areas of expertise, and each faculty member was tasked with creating a mixture of presentation slides, group discussion material, and hands-on exercises. As the faculty completed drafts of their materials, these were shared and coordinated to complement each other through preparatory conference calls and email discussions. Feedback from participants and faculty was then collected, weekly for most events and daily for the IEHD, to allow us to gauge what was working and what might need to be improved. This feedback would then be reviewed alongside the teaching materials to identify adjustments that could be made to individual sessions and the overall schedule for the next event.

Through the feedback collected, it became clear after the 2017 IEHD that students were generally pleased with the breadth and depth of the materials presented, but struggled with fatigue and information overload from several consecutive long days spent processing new and complex information. Feedback revealed a desire for expanded hands-on and unstructured discussion or work time and a wide disparity in the experience of students in technical exercises based on their level of familiarity with given toolsets. To address these issues, the Education
Director, Advisory Board, and faculty for the subsequent IEHDs in 2018 and 2019, worked to incrementally break up the core curriculum into smaller units, shift more information and examples into slides, readings, and handouts for exploration outside of discussion time, and increased the amount of time reserved for open-ended group discussions and break outs. These shifts led to an increasingly modular and adaptable schedule at the IEHD and collaborative workshops held throughout the grant term, which changes were reflected in an overall increase in satisfaction and perceived positive impact reported in daily and weekly feedback collected over the course of this grant period.

Some students early in the grant period expressed that they felt the technical instruction too advanced and fast-paced, others that it was too basic and slow-moving. Another important development in the curriculum was the transformation of technical instruction, from treating these through relatively discrete introductions to a number of digital platforms (i.e. Omeka, Drupal, TEI/XML-based publication stacks) into mostly concept-focused sessions in which these multiple paths for technical development were compared and contrasted with respect to how editors use them to meet their underlying needs, such as transcription, annotation, indexing, and interface design. This change in approach appeared to more consistently engage students across a wider range of previous technical experience or knowledge without as much division between students’ perceived value of these sessions, which was high overall. By reorienting the focus of our approach on generalizable problems and on types of proven technical solutions, rather than on particular technological stacks that needed to be mastered before they could be evaluated critically, we were able to engage the underlying critical issues involved in choosing and implementing digital editing technologies while continuing to focus on the fundamental concepts that cut across different technological approaches. Pairing this reorientation in our technical instruction with a higher proportion overall of adaptable break-out sessions, we were able to foster a more lively and effective mix of large group, small group, and individual learning across the week.

One of the challenges presented by intensive in-person instruction through the IEHD and longer collaborative workshops has been the pull between the need to provide a contextualized, critical understanding of the wide range of issues facing a new editorial project leader and the desire to manifest that understanding in some realized prototype or set of working examples. Since most students were interested in digital editions, many of them had previous digital humanities workshop experience, which proved to require some adjustment in adapting to the IEHD format. The IEHD has been organized primarily by methodological and topical areas, rather than as the kind of tutorial-style training in a single tool or technology that is often offered at other training events in the digital humanities. For those coming from projects that already have an established production and publication workflow, prototyping is an exploratory exercise, but for those seeking funding or proof of concept it can be a high priority. Over the course of the grant period, the Education Director and faculty worked to provide clearer expectations to incoming students about what the IEHD’s guiding principles and goals would be and to more explicitly engage students in discussions of how our shared work together in the IEHD format would translate to their specific individual contexts, including the other types of self-teaching, research, and instruction they could pursue as they continued to hone their personal expertise and develop their projects.

The IEHD and collaborative workshops have long included “spotlight” presentations where students are given the floor for a brief presentation of their individual project and to get feedback and advice from their fellow students and faculty. These presentations have been rated
consistently by students as some of the most popular and impactful session types we have offered. Students have also expressed frustration at the amount of work that is usually required prior to having a finished product to show for their efforts as an editor. It can be hard to convey the value of individual training, learning, and planning during the early stages of an editorial project, and this can have serious consequences for who is able to pursue a sustained editorial project amid other demands from academic programs, employers, or commitments. Beginning in 2018, we invited IEHD participants to take part in a poster session at the ADE Annual Meeting immediately following the institute where the students could present their projects and report on the work they had undertaken so far to an audience of fellow scholarly editors. Most collaborative workshops included a similar end-of-week presentation highlighting the participants’ projects and accomplishments, as well as inviting people to discuss open questions or difficulties that these emerging project leaders were facing. The feedback from these poster presentations was overwhelmingly positive from both presenters and conference attendees, resulting in many productive conversations while also serving to help newcomers feel welcomed and recognized as part of the existing editorial community of the ADE. Finding ways such as this to integrate new people to the editorial community and the ADE membership will be important factors in growing these groups over the long term.

Looking ahead, the lessons learned during this grant period about adapting the in-person ADE curriculum to meet the needs of our participants suggest several opportunities for the new online ADE curriculum that will be developed in the future. As we prepare to move programming online, it will remain important

(1) to provide students multiple paths and the opportunity to customize their experience based on their individual interests and needs,
(2) to frame digital editing and publishing lessons as sites for discussion and exploration of major critical issues rather than as narrow technical exercises,
(3) to set clear expectations for students from the outset for what the outcomes might be for the training they are undertaking, and to
(4) find ways to publicly recognize pre-publication or pre-project-completion achievements in order to encourage new project leaders to continue to work and to become part of a vibrant editorial community.
The 46th Institute for the Editing of Historical Documents (IEHD) was held June 18–22, 2017 at the Embassy Suites Downtown hotel and conference center in Buffalo, New York, in advance of the annual meeting of the ADE, which was held at the same venue June 22–24, 2017.

Faculty

The resident faculty for the 2017 IEHD were Cathy Moran Hajo of the Jane Addams Papers at Ramapo College of New Jersey, Ondine E. LeBlanc of the Massachusetts Historical Society, Jennifer Stertzer of the Washington Papers at the University of Virginia, and Elisa Beshero-Bondar of the Digital Mitford Project and the University of Pittsburgh at Greensburg. To take advantage of the 2017 IEHD's location in Buffalo, New York, we included several special guest instructors selected from Western and Central New York. Additional guest instructors included: Morris Eaves, Turner Professor of Humanities at the University of Rochester and co-editor of the William Blake Archive, who gave our closing lecture on "The Future of Documentary Editions" and participated in a roundtable on "Funding Documentary Editions" with Cathy Moran Hajo and Darrell Meadows (NHPRC); Paul Schacht, Professor of English at SUNY Geneseo and the director of Digital Thoreau, who led our opening session on "Edition Design and Mission Statement"; Eric Loy, Ph.D. Candidate in English at the University of Rochester and Project Coordinator for the William Blake Archive, who contributed to sessions addressing digital editing; and Nora Dimmock, Michael Read, and Lauren Davis of the Seward Family Papers project at the University of Rochester, who lead sessions addressing web design, collaboration, training, and pedagogy.

Students

- Dr. Gregory D. Bereiter, Naval History & Heritage Command of the U.S. Department of the Navy
  - Project: Naval Documents of the American Revolution
- James Bradley, editor and journalist, Time Inc.
  - Project: Papers of Martin Van Buren
- Arthur Craig Braswell, Research Assistant, Stanford University
• Project: Martin Luther King, Jr., Papers Project
  • Ellen Jane Gaal Ingebritsen, Research Assistant, Stanford University
    • Project: Martin Luther King, Jr., Papers Project
  • Nicole Breault, PhD Student, University of Connecticut
    • Project: Edited Collection of Boston’s Night Watch, 1763-1776
  • Emlyn Laura Brown, Archivist, Schlesinger Library, Radcliffe Institute for Advanced Studies, Harvard University
    • Project: Saving the U.S.: Select Sermons, Speeches, and Writings by Adam Clayton Powell on U.S. Foreign Policy, 1935-1960
  • Christina R. Carrick, Assistant Editor, Robert Treat Paine Papers, Massachusetts Historical Society and PhD Student, Boston University
    • Project: Papers of Robert Treat Paine
  • Dr. Scott Cleary, Associate Professor of English and Director of the Institute for Thomas Paine Studies, Iona College
    • Project: Collected Works of Thomas Paine
  • Jane Haxby, Copy Editor, University of Virginia
    • Project: Washington Papers
  • Kathryn Gehred, Research Specialist, University of Virginia
    • Project: Washington Papers, Martha Washington Papers Project
  • Dr. Nathan Ross Kozuskanich, Associate Professor of History, Nipissing University
    • Project: John Dickinson Writings Project
  • Craig Kent Manscill, Associate Professor of Church History and Doctrine, Brigham Young University
    • Project: Hyrum Smith Papers
  • Dr. Christopher F. Minty, Assistant Editor, The Adams Papers, Massachusetts Historical Society
    • Project: Adams Papers
  • Dr. Robert Michael Morrissey, Associate Professor of History, University of Illinois, Urbana-Champaign
    • Project: Jesuit Relations: A Digital Edition
  • Sharon Elizabeth Nielsen, Web Editorial Lead, LDS Church History Department
    • Project: Joseph Smith Papers Project
  • Elizabeth A. Novara, Manuscripts Curator and PhD Student, University of Maryland, College Park
    • Project: Transcribe Maryland
  • Catherine Schmitt, Communications Director, Maine Sea Grant College Program, University of Maine
    • Project: Champlain Society Logbooks
  • Serenity Sutherland, PhD student, University of Rochester
    • Project: Papers of Ellen Swallow Richards

Other Contributors

The Editing Institute Admissions Committee for 2017 consisted of Beth Luey, past ADE Education Director, Ondine LeBlanc, and Neal E. Millikan, Assistant Editor of the Washington
Papers at Mount Vernon and the University of Virginia. Ted Crackel and Jennifer Stertzer assisted with local arrangements.

2018

The 47th Institute for the Editing of Historical Documents was held June 17–21, 2018, in Olympia, Washington, in advance of the annual meeting of the ADE, which was held at the same venue June 22–24, 2017.

Faculty

The three resident IEHD faculty in Olympia returned from teaching the previous year in Buffalo: Cathy Moran Hajo, Ondine LeBlanc, and Jennifer Stertzer. The Education Director, Nikolaus Wasmoen, took on more direct teaching than in 2017, as well. Two guest faculty, Anneliese Dehner, an independent web developer who has worked on multiple prominent scholarly editions including the Civil War Governors of Kentucky and the Jane Addams Papers, and Mark Cheathem (Cumberland University), led sessions in collaboration with Hajo in the morning and afternoon sessions, respectively. Darrell Meadows co-led a session on “Funding Documentary Editions” with Cathy Moran Hajo. The graduation speech on the traditional theme of "The Future of Documentary Editing" was delivered by out-going ADE President Paul Israel (Rutgers University).

Students

- Kathryn Blizzard, Research Editor and Communications Specialist, Center for Digital Editing at the University of Virginia
  - Project: The Washington Papers and The Center for Digital Editing
- Kate Bredeson, Associate Professor of Theatre, Reed College
- Bronwen Arthur, Assistant Editor
  - Project: The Mary Baker Eddy Library
- M. Kelly Carr, Assistant Professor of Communication, University of West Florida
  - Project: Justice Roger Brooke Taney Papers, Digital Collection
- Kim Curtis, Research Editor
  - Project: The Martha Washington Papers and Washington Family Papers
• Sinikka Elvington, Research Project Administrative Assistant & Editorial Assistant
  o Project: Einstein Papers Project
• Gwen Fries, Editorial Assistant, Massachusetts Historical Society
  o Project: Adams Papers Editorial Project
• Jolynn Amrine Goertz, PhD Candidate in Literature, University of Alabama
  o Project: Journal of John Work
• David Gregory, Graduate Student and Assistant Editor, Cumberland University
  o Project: Presidential Papers of Martin Van Buren
• Deborah Gussman, Professor of American Literature, Stockton University
  o Project: Catharine Maria Sedgwick Online Letters
• Christian Heimburger, Historian, LDS Church History Department
  o Project: The Joseph Smith Papers
• Sarah Ketchley, Affiliate Instructor, University of Washington
  o Project: The Hidden Women of the ‘Golden Age’ of Egyptian Archaeology: A Developing Digital Archive
• Melissa Klamer, Ph.D. Candidate in English, Michigan State University
• Shawn Moore, Assistant Professor of English, Florida SouthWestern State College
  o Project: Digital Cavendish Project
• Pia Russell, Learning and Research Librarian, University of Victoria Libraries
  o Project: Creating a Digital Library of British Columbia’s Historical School Textbooks, 1870-1920
• Madison Santmyer, Undergraduate Research Assistant, University of South Carolina
  o Project: The Papers of the Revolutionary Era Pinckney Statesmen Digital Edition
• Natalie Smith, Editorial Assistant
  o Project: Civil War Governors of Kentucky Digital Documentary Edition
• Dana Stefanelli, Assistant Editor
  o Project: Papers of George Washington, Revolutionary War Series
• Jane Tottenham, Doctoral Student in English, National University of Ireland, Galway
  o Project: The Journal of Caroline Synge (1818-1862): A Digital Edition and Study in Life Writing
• Constanze Weise, Assistant Professor of History, Henderson State University
  o Project: The Niger Expedition of Dr. William Balfour Baikie in 1854-1859: Correspondence with the British Foreign Office
• Andrew Wiley, PhD Candidate and Associate Editor, Cumberland University
  o Project: The Papers of Martin Van Buren

Other Contributors

The IEHD Admissions Committee for 2018 consisted of Jennifer Stertzer, Whitney Smith, Assistant Editor at the Civil War Governors of Kentucky, and Nikolaus Wasmoen, ADE Education Director. Jennifer Stertzer and Jeff Looney assisted with local arrangements.
The 48th annual Institute for the Editing of Historical Documents (IEHD) was held at Princeton University and the Hyatt Regency Princeton on June 16–20, 2019. The ADE Annual Meeting took place in the same locations, June 20–22, including the Critical Issues Discussion Session and a special opening poster session showcasing the work of IEHD graduates.

Following discussions among the Advisory Board and the ADE Council about seeking to provide a more immersive and affordable experience for IEHD participants, we pursued a non-conference hotel setting for most of the week of the 2019 Institute, in collaboration with the year’s conference host, the Thomas Jefferson Papers: Retirement Series at Princeton University, and their setting on the university’s campus, providing and on-campus housing option to students and meeting in classroom space for most sessions, with auxiliary space to separate for small groups. By allowing all but one student to stay on campus near the site our meetings, we were able to significantly lower the costs of attendance, as well as to provide greater opportunities for interaction outside of scheduled activities than is possible in a conference center or hotel environment. While there are no IEHD events scheduled for the next two years, when IEHD-style offerings are considered, campus-style options might help to manage costs and enhance interaction among participants. Special thanks to the Jefferson Papers staff who handled the local arrangements and hosted a special visit to their offices, especially James P. McClure, Merry Ellen Scofield, Martha J. King, and Helen (Linny) Schenck.

Faculty

Two of the three resident IEHD faculty from 2018 returned in 2019, Cathy Moran Hajo and Jennifer Stertzer. Serenity Sutherland (SUNY Oswego), an IEHD 2017 Graduate, served as the third resident faculty member, leading or co-leading several sessions on digital editing and textual encoding with Education Director Nikolaus Wasmoen, as well as other breakout groups. To discuss publication workflows and print publishing, Patrick Lewis (Kentucky Historical Society) was invited as a guest faculty member. Darrell Meadows of the NHPRC co-led a session on “Funding Documentary Editions” with Cathy Moran Hajo. The graduation speech was delivered by J. Jefferson Looney (Jefferson Papers, Retirement Series) on the subject of “The Future of Documentary Editing.”
Students

- Dreanna Belden, Assistant Dean for External Relations, University of North Texas Libraries
  - Project: The Papers of Littleton Dennis Teackle
- Thomas Berenato, PhD Candidate in English, University of Virginia
  - Project: David Jones Digital Archive
- Tara Bynum, Assistant Professor of African American Literature and Culture, Hampshire College
  - Project: Cesar Lyndon’s Sundry Account Book: A Digital Scholarly Edition
- Jim Cross, Manuscripts Archivist, Clemson University Libraries
  - Project: Walter J. Brown Journals
- Ikerighi David, MA Candidate and Graduate Research Assistant, George Washington University
  - Project: Eleanor Roosevelt Papers
- Sandy Graham, Associate Professor of Music, Babson College
- Greg Guderian, Special Collections Associate, Newark Public Library, and Research Specialist, New Jersey Historical Society
  - Project: Stevens Family Papers
- Micaiala Hamner, MA student in Strategic Communication & Leadership, University of West Florida
  - Project: Papers of Roger Brooke Taney project
- Sarah Haywood, Editorial Assistant, Kentucky Historical Society
  - Project: Civil War Governors of Kentucky Digital Documentary Edition
- Eric Lamore, Professor of English, University of Puerto Rico at Mayagüez
  - Project: Abigail Field Mott’s 1829 Life and Adventures of Olaudah Equiano: A Critical Edition
- Jenny Lund, Director, Historic Sites Division, Church History Department, Church of Latter Day Saints
  - Project: “We All Must Be Crazy”: The Letters of Sarah Peterson Lund to Her Missionary Husband and Son
- Anne Mansella, Encoder/Researcher, Mary Baker Eddy Papers
  - Project: Mary Baker Eddy Papers
- Delfina (Sol) Martinez Pandiani, Graduate Student at Universita di Bologna
  - Project: Digital Storni
- Marty Matthews, Associate Editor, Papers of the Revolutionary Era Pinckney Statesmen, and Adjunct Professor of History, North Carolina State University
  - Project: Papers of the Revolutionary Era Pinckney Statesmen
- Kate Ozment, Assistant Professor of English, Cal Poly Pomona
  - Project: Charlotte Charke and Recovering Queerness in Early Modern English Literary History
• Dariya Rafiyenko, PhD Candidate, University of Cologne, Department of Byzantine Studies
  o Project: Digital Documentary Edition of the “Excerpta historica Constantiniana de sententiis”
• Tess Renault, Editorial Assistant, Massachusetts Historical Society
  o Project: Adams Papers and Caroline Dall Journals/Wampanoag Vocab
• Tommy Sheppard, Historian, Naval History and Heritage Command
  o Project: The U.S. Navy in World War I: A Documentary History
• Susannah Ural, Professor of History and co-director of the Dale Center for the Study of War & Society, University of Southern Mississippi
  o Project: Civil War Governors of Mississippi

Other Contributors

The Editing Institute Admissions Committee for 2017 consisted of Cathy Moran Hajo, Serenity Sutherland, and Nikolaus Wasmoen, ADE Education Director.

Advanced Seminar on Critical Issues

Over the course of the grant period, the Advanced Seminar evolved from a traditional conference roundtable to an increasingly open-ended discussion forum, as we worked to expand the scope and participation of ADE members and outside audiences in the discussion of key issues facing the field. The Critical Issues events were conceptualized and primarily organized by the ADE President-Elect each year, serving as an opportunity to launch elements of that President’s agenda for the coming year and to spur exploration of the given conference themes, while also responding to current events and debates. These sessions enabled the ADE to bring outside voices from related fields or groups into conversation with its membership in a format that allowed for broad participation as well as relatively advanced discussions to which the public was also encouraged to participate.

2017

The 2017 Advanced Seminar on Critical Issues took place on June 23, 2017, at the Association for Documentary Editing’s annual meeting. The panel, "Maximizing the Reach and Continuing Influence of Digital History Projects," was moderated by Katie Lebert, Communications Director at the Washington Papers, and included the following participants:

• Julie Silverbrook (Executive Director, The Constitutional Sources Project – ConSource)
• Jennifer Stertzer (Senior Editor of the Washington Papers and Director of the Center for Digital Editing at the University of Virginia)
• Paul Israel (Director and General Editor of the Thomas A. Edison Papers at Rutgers University)
• Sara Martin (Series Editor for the Papers of John Adams)
• Ted McConnell (Executive Director, Campaign for the Civic Mission of Schools)
The panel was attended by approximately sixty people and resulted in an interesting discussion among the participants and audience members about how existing audiences for scholarly editions might be expanded and new audiences found. Much of the discussion centered around thinking of new sources of support and cross-promotion that could be found in existing governmental and non-governmental programs for civic engagement, K-12 education, political and governmental history, cultural institutions, universities, and others where scholarly editing has not yet been able to secure a footing. Flexible, creative thinking about how to configure partnerships and grant proposals for scholarly editions was a prominent theme of the conversation.

2018

The 2018 Advanced Seminar on Critical Issues took place on June 21, 2018 at the ADE Annual Meeting on the theme of "Creating New Technological and Human Infrastructures: A Forum on the NHPRC-Mellon Digital Edition Publishing Cooperatives." This theme was developed first through discussion over email and, then, a remote planning meeting held in February 2018. The planning meeting was hosted by Darrell Meadows and included the ADE President, Programming Committee members, the Education Director, and members of the cooperatives. The timing of the Annual Meeting and Advanced Seminar allowed for a discussion of the current state of these major initiatives during their first year of operation and of their plans for future development or expansion. As centers for innovation and advanced collaboration within the documentary editing community, the cooperatives offered a special opportunity for exploring, as the title indicates, both the "technological and human" issues raised by digital publication, especially as these relate to the wants and needs of the larger documentary editing community.

Representatives from each of the 8 funded cooperatives were invited to participate in the session, of which 4 were able to attend:

- Patrick Lewis (Kentucky Historical Society): Nineteenth Century Digital Cooperative
- Laura Mandell (Texas A&M University): ARCScholar
- Jennifer Stertzer (University of Virginia): UVA Digital Publishing Cooperative

Additionally, one of the program's grant officers, Darrell Meadows, presented from the perspective of the program’s creation and administration. Kathryn Blizzard, a communications professional for the Washington Papers and the University of Virginia Center for Digital Editing, was invited to serve again as the session moderator, having received positive feedback for her work in the same role at the previous Advanced Seminar in 2017.

The need for aligning incentives and goals among different stakeholders and contributors was a prominent theme in the discussions of the early work on the Cooperatives, and much of the discussion centered on ideas for easing the strains placed on a highly collaborative project by the difficulty of maintaining shared standards (and consistent implementations of them), communications and documentation, and project management. The benefits of these larger
collaborations discussed included the impact of broader perspectives being applied in decision making, the ability of individuals to specialize within the framework of a larger enterprise where no one is responsible for every task personally, and the emergent knowledge bases that are built among people working closely together on related projects.

2019

In 2019, the “Advanced Seminar” was held at the Annual Meeting in the form of a “Critical Issues Discussion Session” on the fortieth-anniversary theme of “Paths Forward for Another Forty.” This discussion session took the form of a dual presentation followed by an open forum including the audience. The President-Elect, Ondine LeBlanc, served as moderator, and there were two formal presenters:

- Dale S. Brenneman (O’odham-Piipaash Documentary History Project) on “Indigenous Oral Traditions as Evidence” and
- Marty D. Matthews (Papers of the Revolutionary Era Pinckney Statesmen) on “Helping Historic Sites and Museums Recognize and Cite Evidence from Documentary Editions.”

Leblanc used her role as moderator to pose a question to the assembled group: “What does the ADE need?” The papers selected for the session spoke in different ways to the need for expanding the reach, scope, and impacts of documentary editing as a field of practice into domains where it has not historically had much of a footprint, and the ensuing discussion pressed the ADE membership to discuss what it will take to actually accomplish these aims. Questions and responses during the open discussion spoke to the working conditions of editors and of the real-world situations facing projects in a world of limited funding, time, and resources. Among the many viewpoints and imperatives discussed, the need for growing the ADE as an organization, coalition building with allied or complementary organizations, and facilitating effective collaboration and transfer of knowledge and resources featured prominently.

Collaborative Workshops

2017

In June 2017, Jennifer Stertzer and Cathy Moran Hajo co-taught a weeklong workshop at the Digital Humanities Summer Institute in Victoria, British Columbia, Canada, titled "Conceptualising and Creating a Digital Edition," which was fully subscribed. The workshop's aim was to "explore all aspects of conceptualizing, planning for, and creating a digital edition" with the goal of preparing "participants to return to their home institutions ready and able to build upon, enhance, and transform [their] initial ideas into robust digital editions."

2018

Jennifer Stertzer and the Education Director co-led the "Conceptualising and Creating a Digital Edition" course at the Digital Humanities Summer Institute (DHSI) in Victoria, B.C. on June 2-7, 2018. In October of 2018, the Education Director and Jennifer Steenshorne, Director of the Washington Papers, led a pre-conference workshop at Iona College for the Papers of Thomas Paine team and attendees of the International Thomas Paine Society Conference. The event was
a collaboration with the Papers of Thomas Paine and the ITPS, and was coordinated by Scott Cleary, a graduate of the 2017 IEHD.

2019

On May 6-10, 2019, the ADE co-sponsored a workshop at the DH@Guelph program held at the University of Guelph in Ontario. The Education Director and Stertzer led onsite sessions, while guest faculty Hajo and Erica Cavanaugh joined the group remotely to lead introductions to Omeka and Drupal, respective, as digital editing platforms, as well as of edition derivatives such as timelines, data visualizations, and story maps that they had created. Following the derivatives presentations, Stertzer and Wasmoen led in class exercises creating timelines from edition data to allow students to explore alternative interfaces and outputs for edited information and content. The derivative presentations and timeline exercises were repeated later at DHSI and the IEHD. The small class size of eight students at Guelph allowed for greater opportunities for small group and individual interactions between faculty and students, which helped in turn to create an opportunity for experimentation with the more open-ended and responsive approach to forming the sequence of lessons that were described above with respect to the IEHD later in the summer of 2019. Susan Brown (University at Guelph) was also invited to give a presentation on the CWRC-Writer project, an open source tool that integrates tools for digitization, control, transcription, annotation, markup, prosopography, indexing and search, as well as the generation of linked open data.

On June 3-7, 2019, the Education Director and Stertzer co-taught a new version of the weeklong seminar, titled "Conceptualising and Creating a Digital Edition," at DHSI. They were again joined by Hajo, Cavanaugh, and Brown for remotely lead discussions, as well as by Sutherland, who was attending another DHSI course during the same time, for an in-person discussion of textual encoding. The eighteen students represented a wide array of disciplinary, period, and methodological interests in documentary editing. The syllabus continued the experiments begun in Guelph the month before by adding more choices and options into the schedule to allow students to direct the course of the sessions.

Expanding the ADE Education Webpage

After discussions and planning work over the course of the grant, the ADE published its updated Education webpages on December 31st, 2019. The published version of the updated Education webpage includes features that were drafted at a Fall 2019 grant project planning meeting hosted by the Center for Digital Editions at the University of Virgin which was also used to begin the process of preparing wider outreach to partner organizations for the coming grant term. The planning meeting participants included the Education Director, Jennifer Stertzer, Cathy Moran Hajo, Silvia Glick, Erica Cavanaugh, Kathryn Blizzard, Tanya Zanish-Belcher (Director of Special Collections & Archives, Wake Forest University), Joseph Beatty (Editor of Colonial Records for the North Carolina Office of Archives and History), Rennie Mapp (Project Manager for Strategic DH Initiatives at UVA), Alison Booth (Professor of English and Director of the Scholar's Lab at UVA), with participation in a follow-up remote meeting being joined by Andrew Stauffer (Associate Professor of English and Director of Book Traces).
Representatives from outside organizations and local potential collaborators at the next grant’s host at the University of Virginia were invited to join core ADE Education project team members to discuss how we might begin to build stronger connections and collaborations with groups of archivists, librarians, regional, state, and local historical societies, digital humanities organizations, international partners, and others.

The updated ADE Education pages contain several sections and spaces that will eventually be filled with announcements about upcoming opportunities and events of interest to those pursuing editorial projects:

- **Education FAQs**
  - Answers to some of the most frequently asked questions on getting started in the field.
- **Workshops & Seminars**
  - Listings from a number of organizations offering courses and workshops on aspects of editing.
- **Online Training**
  - Where future ADE Institute online courses will be listed.
- **Editions in the Classroom**
  - Where information from various editorial projects will be gathered to help students and teachers use documents and original sources in their work.
- **Community**
  - Links to help people point others in discussing practical issues and seek advice on editorial project decisions, including information about the ADE scholarly editing community, conferences, and listservs.
- **Articles & Case Studies**
  - Articles on historical editing, defining and organizing documentary editions, document selection, annotation, publishing the edition, and other readings drawn from ADE curriculum.

These offerings were selected after discussions about who the current potential users for the ADE Education programs are and what they may need to begin pursuing their ideas for new projects, including links to recent IEHD curriculum, other sections of the ADE site, and external resources. We have aimed to create a landing point for new or prospective project leaders that can be developed and expanded to meet the needs of editors in many contexts, as well as allow us to integrate links and information supporting our collaborations with other groups, such as through shared listings of related offerings and, eventually, classes and resources developed in partnership. Comments from users on this final report and the updated Education pages will be collected and used to drive further development and updates.