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#### DOCUMENTARY EDITING: DEMOCRATIZING HISTORY

As the profession of documentary editing enters the twenty-first century, it can reflect on the many challenges it has overcome and look forward to those it will need to confront in the future. One theme that should embolden all historians is how to democratize history.

Twentieth-century historians have produced thousands of volumes of letterpress and microform editions. While these efforts are commendable, are they enough? The promise of digital media portends what the historian and new media exponent Roy Rosenzweig terms the "democratized access to the historical record." Another historian, the George Washington biographer Henry Wiencek, in an address at the 2002 annual meeting of the Association for Documentary Editing also urged a "'democracy of knowledge' because unless all citizens have reasonably easy access to reliable, accurate texts, true knowledge is restricted to the mandarin class, the specialists with the funds, the time, and the connections to gain access to original documents." While Wiencek uses the Library of Congress's website to download the text from a Washington letter, he finds the Internet "an anarchy of facts." He much prefers the copious notes that the editors of the George Washington Papers provide. What Wiencek fails to realize is that the Internet can democratize history beyond anything that the very limited print runs of traditional documentary editions can ever hope to provide.<sup>1</sup>

This essay will provide a brief history of documentary editing, the federal government agency charged with promoting historical editing—the National Historical Publications and Records Commission (NHPRC)—and the

twenty-five-year-old Association for Documentary Editing. In addition, I will trace the use of new technology at specific projects and study the possibilities and problems associated with the new media.

#### A Historical Overview

The history of historical editing dates back more than two millennia to about the sixth century and the unknown Greek scholars who established the text of Homer's *The Iliad* and *The Odyssey*, and Saint Jerome who in the fourth century A.D. and early fifth century provided a Latin translation of the Bible from Hebrew and Greek texts. Interest in documenting the American past began in 1774 when the printer/editor Ebenezer Hazard recognized the need to preserve and disseminate the new Republic's treasured heritage of state papers. After seeing Hazard's first volume of *Historical Collections*, Thomas Jefferson urged the editor in 1792 to continue his work as "Time and accident are committing daily havoc on the originals...let us save what remains: not by vaults and locks, which fence them from the public eye and use, in consigning them to the waste of time, but by such a multiplication of copies as shall place them beyond the reach of accident." Also in 1792, the Massachusetts Historical Society entered the documentary editing field with its first volume of documents on New England. But historical editing in the United States did not begin in full force until Jared Sparks of Harvard decided in the second quarter of the nineteenth century to collect documents for his editions on the writings of George Washington and Gouverneur Morris, as well as for a compilation of diplomatic correspondence of the American Revolution. By mid-nineteenth century, the federal government had published its *American State Papers* series and some descendants of public figures such as John Jay and John Adams were printing collections of their relatives—the latter with varying fidelity to the historical record.<sup>2</sup>

As the nineteenth century drew to a close, historians, as well as other professionals, espoused rigorous standards for their craft. Documentary editors also became introspective and sought ways to improve their editions. Whereas the work undertaken by editors such as the brothers Paul Leicester Ford and Worthington Chauncey Ford "showed considerable textual sophistication for the time," there was no central body, such as the American Historical Association founded in 1884, to systematize the subfield of historical editing. President Theodore Roosevelt, whose interest in history led him to use the Navy Department's official correspondence in writing his *Naval War of 1812* monograph, established a committee under the direction of Worthington C. Ford and J. Franklin Jameson to report on historical publications. The committee's 1908 report urged the formation of a permanent federal commission, but nothing came of its recommendations until Franklin D. Roosevelt's administration. Despite the lack of a centralized organization, individual government agencies such as the Library of Congress undertook such editing projects as Worthington Ford's *Journals of the Continental Congress*.<sup>3</sup>

At first glance, it might have seemed unlikely that Congress in 1934 would have taken the time from its Depression-related business to create the National Historical Publications Commission (NHPC) when it set up the National Archives. But the impetus for such an agency came from FDR, an avid historian, who personally spearheaded during his administration two naval editing projects on the Quasi War with France and the Barbary Wars. While Roosevelt was able to spare time away from his New Deal and wartime duties to keep these two projects on a strict publication schedule, he could not spur Congress to fund the NHPC with a staff. Consequently, that commission lay practically moribund from its creation in 1934 until another president, Harry Truman, resurrected it.<sup>4</sup>

The modern age of documentary editing dates from the year 1950, a pivotal year because of the publication that year of the first volume of *The*

*Papers of Thomas Jefferson*. But as with all historical events, nothing happens in a vacuum. During World War II two historians, Julian P. Boyd at Princeton University and Lyman Butterfield at Franklin and Marshall College began editing the papers of Thomas Jefferson and Benjamin Rush respectively. Butterfield soon joined Boyd at Princeton, and by making use of the new photocopying technology and establishing a cataloging system, they were able to cull variant copies of Jefferson letters. By adopting a textual editorial policy, they were able to provide the reader with reliable texts. In addition to formalizing editorial policies, the Jefferson project imparted its historical expertise by writing informative annotations. According to Mary-Jo Kline, a historian of documentary editing, the publication of the first Jefferson volume in 1950 and the two-volume Rush correspondence the following year marked "the hallmark of American historical editing" for their "combination of textual attention and explanatory annotation."<sup>5</sup>

After being presented with the first Jefferson volume, President Truman enthusiastically pushed to revitalize the NHPC, designating it as the federal institution mandated to establish a national program for the publication of the papers of American leaders. The Commission was charged with making the documentary record, found in letters, diaries, journals, and reports, more "conveniently available for consultation by all persons who wish to know and understand the history of the United States." A survey conducted by the NHPC of 150 historians, librarians, and archivists found most felt "money spent in publishing well-edited primary sources is an investment in the future." The Commission's role was not that of editor but facilitator—to encourage other organizations to undertake a project and to establish editorial standards. Not until 1964 did Congress give the Commission authority to fund grants.<sup>6</sup>

The NHPC's 1951 report outlined a program for the "publication of the papers of American leaders." Recognizing the popularity of biography in historical research, the Commission's 1954 report noted that its survey of

scholars welcomed a search for possible subjects beyond the political arena to "captains of industry and labor, inventors, scientists, educators, religious leaders, editors, writers, and architects." Of the 361 persons recommended to the Commission for consideration, only three were women--Clara Barton, Susan B. Anthony, and Jane Addams. The criterion for inclusion was "the extent to which an individual influenced the national life and thought and so significantly helped shape the course of the Nation's history." The 1951 Commission report had recommended specifically that comprehensive editions of Benjamin Franklin, John and John Quincy Adams, James Madison, and Alexander Hamilton be given foremost attention. By 1956 projects for these five men had joined the Thomas Jefferson, Henry Clay, and John C. Calhoun Papers in a burst of documentary editing energy. One contribution of the 1954 NHPC report was the recognition of subjects as an important field of inquiry in addition to that of individuals. The Commission cited publication of documents relating to the Continental Congress, the ratification of the Constitution and the first ten amendments, and the First Federal Congress as worthwhile endeavors.<sup>7</sup>

While documentary editing enjoyed an initial "honeymoon" period following the publication of Boyd's first volume of *The Papers of Thomas Jefferson*, some critical reviews of documentary editing revealed differing points of view about the types of subjects chosen to be edited, the usefulness of nontraditional topics (i.e., any subject but a national leader), and the nature of the editor's craft. Reflecting a historiographical trend in the early 1970s toward a "history from below" historical approach, Jesse Lemisch, in a report prepared for the American Historical Association's Committee on the Commemoration of the American Revolution Bicentennial, attacked the National Historical Publications Commission and the historical editing profession for emphasizing projects of "Great White Men" to the exclusion of minorities and women. Terming the historical editing program in

1971 "an anachronism, a relic of the 'fifties," Lemisch noted that a broad mandate to study "all the important aspects of our national development" through the editing of "the papers of American leaders" had narrowed to a focus on a single gender and race. The Booker T. Washington Papers project was in the forefront of this historical change in emphasis with its publication in 1972 of the first volume of this noted African-American leader's papers.<sup>8</sup>

The stinging criticism of other historians toward the narrow orientation of the first two decades of NHPC-sponsored projects did not go unanswered. Within ten years the National Historical Publications and Records Commission (the NHPC was mandated in 1975 to preserve as well as publish the documentary record—thus becoming the NHPRC) had redirected its original focus from individuals to "institutions and organizations, women as well as men, and leaders of a variety of ethnic and racial groups whose significance lay in social and intellectual as well as political history." By the late 1970s the NHPRC rejected the criteria of fame alone and emphasized the need "to illuminate the nation's history" in order to expand its vision of acceptable projects. The National Endowment for the Humanities also embraced those new projects that would "facilitate the writing or appreciation of American social history."<sup>9</sup>

The Freedmen and Southern Society Project founded at the University of Maryland in 1976 was one such project that came to the fore after Lemisch's rebuke. LaWanda Cox in a review of the 1982 publication, *Freedom: A Documentary History of Emancipation, 1861-1867: The Black Military Experience*, edited by Ira Berlin, Joseph P. Reidy, and Leslie S. Rowland, extolled the innovative editorial approach taken by the Freedmen editors. First and foremost, African Americans in this series hold the central position in illuminating the process of emancipation. All the attributes of social history are consciously embedded in this documentary project, as its

editors assert that emancipation "accomplished a profound social revolution." Studying not one person but a group and especially one composed of non-elites distinguishes *Freedom* from previous documentary projects of white, male leaders.<sup>10</sup>

But not all historians welcomed the broadening of editorial topics. For historians Richard H. Kohn and George M. Curtis III in an essay derisive of historical editing's place outside the academy, the utility of a project alone justified its existence and "not ethnic or sexual balance, ...or balance between subspecialties of American history." These scholars questioned whether government agencies "should lead and direct historical study by the funding of documentary projects, or whether they should follow the needs of independent scholars." For Kohn and Curtis the utility of a project meant studying national leaders and reflected their own military and economic historical orientations.<sup>11</sup>

While Lemisch addressed the content of historical editions, others assailed their methodology—the textual treatment of documents. Some early critics had challenged the Boydian policy of expansive transcriptions, which permitted changes (often silent) that would make a document more easily understandable to the reader. But these critics were in the minority. The Boydian editorial method of modernizing the text became standard fare among projects well into the 1970s, until the literary editor G. Thomas Tanselle effectively shot the cannon across the historical editors' bow with his 1978 criticism of anything but literal transcriptions of documents. His censure of editorial policies led to a healthy reevaluation of editorial practices that needed fuller clarification.<sup>12</sup>

In 1980 at the Association for Documentary Editing's annual meeting, a session entitled "The Tanselle Thesis" featured papers (published the next year in the *Newsletter of the Association for Documentary Editing*) by Don L. Cook, professor of English at Indiana University and editor of a select

edition of the papers of W. D. Howells, and Robert J. Taylor, editor and chief of the Adams Papers. Cook very succinctly described Tanselle's editorial theory as short (six propositions) and happy (it promised deliverance "from error and misconception"). Cook concurred with Tanselle's contention that material that was "modernized is indefensible" and he further asserted that the editor should not be "tyrannized" for "the convenience of the reader" as the integrity of the text was above all essential. For historical scholar Taylor, Cook and Tanselle represented the extreme editorial approach found among those who edited literary works. Taylor abhorred Tanselle's "clear-lines" and "firm-distinctions" that insisted on giving the reader "the same experience as 'reading the original'" even if that meant confronting "angle brackets, braces, unexpanded abbreviations, and intrusive commas." For Taylor, the editor was not an automaton—blindly transcribing—but rather a mediator of the text, who through his expertise and judgment rendered text comprehensible. Not all projects, however, supported Taylor's hands-on approach. Besides exemplifying the trend toward more social as opposed to political history, the Freedmen's project also benefited from the editorial controversy over modernization and silent corrections of text. By adopting a non-interventionist, Tanselle-style, editorial policy, Berlin and his fellow editors faithfully maintained the phonetic spelling of these non-elites and thereby set the tone for understanding the world of the barely educated.<sup>13</sup>

Agreeing on a definition of readability is at the crux of the debate over textual purity and the nature of the audience is critical to this. Editorial projects seek to illuminate history through presentation of the documentary record. Their primary readership is scholarly with some representation from the general public. Do these users require different things from an edition? The general audience may be more interested in reading casually through a grouping of letters and therefore may want the

convenience of a modernized text. One might think that scholars would prefer pristine text that they could rely on as definitive (without the editor's mediation) for use within their interpretive framework. While editors such as Cook and Taylor tackled this textual criticism from Tanselle, historians such as Gordon Wood in a 1981 review of the first four volumes of the *Papers of John Adams* took a closer look at the problems of editing historical documents. While Wood agreed with Tanselle that accuracy of textural reproduction was essential, he also asserted that the historian required both readability and usability in scholarly editions. Because historians must wade through voluminous amounts of documentation, having material presented "in a highly readable form" rather than in a "literal, unemended form" would expedite processing time. Beyond readability lay the problem of quoting material that monograph readers might have to decipher if left in a literal, unmodernized style. The historian, according to Wood, would be compelled to "edit" a text, without the editor's expertise and uniform practices. He objected to "making every historian his own editor" because he deemed "convenience of use" more important than "literal accuracy."<sup>14</sup>

In addition to differences over content and methodology, issues of selectivity divided the editing field in the 1970s and 1980s. An editor engages in interpretation even when he has no annotations. How he arranges the documents—chronologically or topically—but more importantly, what material he selects or leaves out can influence the view of a subject. While editor of the *Papers of Albert Gallatin*, Barbara Oberg studied how Henry Adams's three-volume 1879 edition of the *Writings of Albert Gallatin*, although lacking annotations, reflected its editor's own intellectual predilections. Oberg found that Adams's edition excluded Gallatin's pre-1801 correspondence because the editor considered Gallatin's earlier years unsettled and less respectable until he joined Jefferson's Cabinet. This interpretive decision to exclude certain documents has influenced scholars

who relied for one hundred years on this published edition for their perspective on Gallatin. The modern edition of his papers (51 microfilm reels completed in 1985) was a comprehensive edition of his papers from 1761-1849 rather than from just the period of Gallatin's prime political years. Certainly this latest edition also has the interpretive marks of its editors, but at least the reader has a larger number of documents to study than in the edition Henry Adams produced a century ago.<sup>15</sup>

What is better: to have comprehensive editions that take decades to complete at great financial cost or selected editions completed in a shorter timeframe at significant savings? The original intent of the NHPC in sponsoring editorial projects featuring national leaders was to provide comprehensive, professionally edited, editions that would supersede the often overly selective editions of past generations. In 1963 the Commission commended comprehensive editions because this type of writing would aid in democratizing history by encouraging "everyman to become his own historian."

A further significant point to be considered is that the scholarship and the funds invested in these modern editorial projects are destined to be more permanent and lasting in their influence than biographical or monographic writing. Documents are not chosen to represent the man as the editor wishes to present him. They are not chosen to emphasize a particular interpretation of history. They are not selected to illustrate a particular interest in history that may be the editor's or that of his age. They include social, economic, scientific, and cultural aspects of everyday living in the past that to earlier editors seemed too ordinary to have significance, but that to a changed world are often pregnant with meaning. These editions will endure because they are above suspicion of partisanship and because in their inclusiveness they anticipate the changing interests of future historians.<sup>16</sup>

Indeed, the NHPRC until the late 1970s extolled the virtues of the comprehensive edition. But when many projects failed to achieve their anticipated publication schedule, critics such as Gordon Wood harped on misguided selections and unnecessary annotations as the likely culprits. As projects became more constrained by limited printing budgets to produce selective rather than definitive editions, Wood promoted calendaring material

published elsewhere to leave room for unpublished documents. According to Wood, historians have a vested interest in these editions and need to use the review process to express their views on selectivity in order to reduce the production time so that contemporary writers can benefit in their lifetime.<sup>17</sup>

While the initial trend in historical editing in the post-1950 period was toward comprehensive editions, extensive annotating also found ready acceptance among scholarly editors with advanced degrees in history. What role should interpretative scholarship play in historical editing? How much annotation is acceptable? Lestor Cappon, the Director of the Institute of Early American History and Culture, wrote in 1966 that the modern editor, i.e., beginning with Julian Boyd, was not "a narrow-minded purveyor of documents," but "a knowledgeable scholar concerned with the meaning of the sources at his command." Editorial projects in the last quarter of the nineteenth century, according to Cappon, lacked annotations, as the editors of that period were "prone to 'edit out' what seemed excessive and unimportant, but not to 'edit in' explanatory facts and historical opinion." Early twentieth-century editors used annotation to varying degrees, but included "little of an interpretive nature." The views of John C. Fitzpatrick (editor of George Washington's diaries and the journals of the Continental Congress) toward editing, according to Cappon, "barred him from historical interpretation" and Clarence Carter (editor of the *Territorial Papers of the United States*) was adamant that "the editor must eschew any and all forms of interpretation." By contrast, Cappon noted that a new era in editorial scholarship began with scholar-editor Julian Boyd, who asserted that the editor had a responsibility to provide "disciplined comment." For Cappon, the historical editor who mastered the documents was fully capable to "clarify and explain" and it was his responsibility as editor to annotate.<sup>18</sup>

The Boyd editorial model of extensive annotations predominated among editorial projects for thirty years with a few reviewers criticizing the

efforts practiced by those less skilled than Jefferson's editor. In a 1962 review of the first two volumes of *The Papers of James Madison*, the constitutional history scholar Leonard W. Levy vociferously railed against "the editorial imperialism and compulsiveness" found there. Madison's editors, according to Levy, printed the trivial and annotated too lavishly.<sup>19</sup>

But while Levy was correct in criticizing examples of obvious pedantry among some editors, he did not provide the profession with a standard for annotating. Almost twenty years later, Charles T. Cullen, a former editor of the Jefferson Papers and currently Director of the Newberry Library, succinctly outlined several principles to guide editors in annotating their documents. Cullen agreed with Boyd and Cappon that annotations were properly "within the boundaries of their work as editors." He disputed the claims of those who found that interpretive annotations changed an editor to an author. Rather, he noted that the editor can provide helpful notes that do not "intrude or obscure" but rather "lead" scholars to new paths to explore. While Cullen justified the editor's duty to annotate, he also set limits on boundaries—the editor must restrict his scope to his subject and not fly off on tangents. Above all, moderation must guide the editor to avoid excessive "displays of erudition" or "polemical essays." Cullen's views on establishing a standard for annotation were based on his desire to assist editors in formulating guideposts. Responding to the then current (early 1980s) cries for cost-cutting measures, Cullen rejected a stance that would confuse "problems of annotation with problems of funding," because basing decisions on projects' fiscal stringency would result in hastily prepared, flawed editions.<sup>20</sup>

Writing in 1984, a few years after Cullen, LaWanda Cox commended the Freedmen's Project for its extensive footnotes. She found that that project had opened new horizons for more interpretative history by deliberately rejecting the NHPRC's criticism in 1981 of those editors who "permitted

themselves the luxury of practicing history-writing in the footnotes." In that year's report, the Commission promoted accurate presentation over historical analysis. In opposition to the NHPRC's stance, Professor Cox extolled the type of "history-writing" exemplified by the Freedmen project because she recognized that historians who work on editing projects are so thoroughly immersed in their work that they are subject-specialists and therefore are most fully qualified to write cogent annotations and introductory essays.<sup>21</sup>

Criticism during the 1970s of editorial practices culminated in the NHPRC-commissioned report in 1981 by Henry A. Graff and A. Simone Reagor. Recognizing that the NHPRC did not always represent their views, a group of editors decided to establish their own institutional forum for all editors—historical and literary. They formed the Association for Documentary Editing (ADE) in 1978. One important function of the ADE was and remains educating historians about the editorial craft, and this was ably undertaken by disseminating the *Guide to Documentary Editing* and *Editing Documents and Texts: An Annotated Bibliography*. In the 1980s the ADE served as a sounding board for editors who recognized that they must reevaluate their field. The Tanselle debate, if nothing else, demanded introspection at projects whose stated editorial policies often did not coincide with their everyday practice. Not all historians have welcomed this institutionalization of the editing field. Richard H. Kohn and George M. Curtis III questioned the formation of the ADE because it "balkanizes the profession and institutionalizes jealousy." John C. Burnham in a 1979 review of Volume 2 of *The Papers of Joseph Henry* castigated that project for printing trivial documents and antiquarian and inconsistent annotations. Alleging to speak for those disgruntled traditional historians who lamented the downturn in the job market, Burnham resented that the government's largesse was distributed to editing projects and not directly to writers of monographs.<sup>22</sup>

While editors in the early 1980s refined their editorial procedures to offset criticism of their technical apparatus, they found for the first time in thirty years their very existence under attack. The federal agencies that provided grant support to projects (NHPRC, National Endowment for the Humanities, and National Endowment for the Arts) confronted major budget cuts and even the threat of elimination. In light of economic reality, editors reassessed the traditional type of project (the Boydian, long-term, costly, definitive series) to find another type of edition, still acceptable to its scholarly audience but more attuned to the realities of cost.

Funding propelled the introspection that occurred among editing projects beginning in the mid-1970s. The NHPC's role in the 1950s as a clearinghouse for ideas and advice assumed greater importance for documentary editors in 1964 when it began administering grants from private institutions and then from the government. Before that year, projects depended on private funding from charitable foundations that were more attuned to short-term grants than financing multi-year and multi-volume projects, such as those envisioned for the Founding Fathers. The ten years after the NHPC began issuing grants were a flush period for projects, but leaner times (flat budgets coupled with high inflation in the late 1970s) eroded the value of the funds that the Commission could distribute.

Responding to adversity, the NHPRC contracted in 1980 for an independent review of the state of historical editing. Issues of funding, production schedules, editorial methods, technological tools, letterpress vs. microform editions, the usability of editions, and the NHPRC's continuing role were included in a report submitted to the Commission in 1981. The study's title, *Documentary Editing in Crisis*, reflected the somber times the profession had entered. While finding some problems with the Commission's entrenched bureaucracy, the main thrust of the study reviewed long-term documentary projects and recommended systemic changes. By 1981 only one of

the original Founding Fathers projects (Alexander Hamilton) was almost complete. These editions absorbed fifteen to twenty per cent of the Commission's budget. Meanwhile, the NHPRC faced frozen appropriations and a mounting number of applications for new projects with social rather than political themes. Some of the recommendations for "doing more with less" struck at some fundamental principles that editors (by now second or third generation) held paramount to achieving their scholarly publication goals.<sup>23</sup>

The Graff/Reagor report could not have been stronger in its advocacy of the importance of documentary editing: "By making and publishing faithful copies of our indispensable manuscripts, enhanced by scholarly arranging and editing, American society is protected against their accidental or deliberate loss or destruction." But the report also found that preservation was not the only reason for sponsoring projects, as accessibility to more than "a handful of scholars able and willing to pursue fugitive manuscripts from one end of the country to another" was equally important.<sup>24</sup>

But while this study discerned a unified sense of the value of editions among the NHPRC and editors, it also found that the two groups disagreed about editorial method. The former wanted to see swifter production while the latter were averse to change. The Commission's wish to support more short-term projects reflective of the new social history in vogue in academia was restricted by the continued need to fund the Founding Fathers projects. The report termed the latter burdensome "relics." Graff and Reagor put the onus for the slow publication rate and high cost of these comprehensive editions on the editorial principles of annotation and selection of these projects. The report focused in particular on selection as the main culprit in determining the longevity of some projects. It contended that using Boyd's *Jefferson Papers* as the benchmark for ascertaining what to include might have been justified at a time of full funding but not now in a period of retrenchment. Likewise, all editions did not merit Boyd's expansive

annotations. The study's authors recommended that each project define its "mission" and "intended audience" and then "set the level of annotation." In promoting future changes, the report recommended that all long-term projects should reevaluate their methods to try to streamline their work. Some might consider switching to microform, adopt a narrow theme for their work, or consider not publishing documents already printed in other NHPRC editions.<sup>25</sup>

The immediate reaction by the documentary editing community to the budgetary crisis faced by NHPRC and NEH was not to redefine itself but to fight back. The issues of the *Newsletter of the Association for Documentary Editing* and its successor, *Documentary Editing*, carried news items of Capitol Hill updates about the Ronald Reagan administration's recommendations for zero funding for NHPRC's grants program in the 1980s and its effort to end the Commission's granting authority. Grass roots lobbying by members of the ADE and other historians spurred Congress to include appropriations for the NHPRC's grant program. The last twenty years have proved an unsteady, fiscal time for the NHPRC as the organization frequently fluctuated on the brink of staff cuts only to have its funding restored at the last minute. In this unsettled atmosphere, the Commission has been forced to reevaluate the level of funding it can provide to ongoing projects as well as scrutinize new applications more closely to ascertain their chances of viability. What had been touted by the NHPC of the 1950s as an effort to provide the American people with a comprehensive and definitive documentary record of their history, was termed in 1991 merely an "adequate, accurate, and accessible historical record" by the Commission's then executive director, Gerald George. George repeated the word "adequate" two more times in an article for *Documentary Editing* that somberly reminded readers of the hard realities facing historical editing.<sup>26</sup>

At the same time that budget cuts in the 1980s forced a reevaluation of editors' methodology in selection and annotation, new forms of technology emerged that offered projects the hope of cost- and timesaving opportunities. The following discussion traces the history of implementing new technology in documentary editing.

Just as historians have changed over the past one hundred years, becoming more professional, specializing in new areas such as social and cultural history, narrowing their areas of expertise, and beginning to embrace the new technology available to them, so too have documentary editors. Fiscal economies forced the latter to pursue new technologies perhaps sooner than did historians. Since the late 1970s, the NHPC and the ADE steadfastly promoted this change.

Until 1964 the NHPC's leadership role in historical editing remained restricted to the bully pulpit. Once Congress authorized grant-making authority in that year, the Commission became more directly involved in the editing field through the parameters set in its application guidelines and indirectly through recommendations to existing projects. In the hopes of speeding production at slow-moving projects, the Commission used educational articles and conferences to encourage the use of new technology. During the first half of 1978, Commission staff conducted workshops at various projects to demonstrate the feasibility of computerized printing equipment. The Commission embraced keyboarding at the source because it eliminated retyping and thereby decreased the number of errors. The Commission thus intended to "reduce editorial costs and production duplication, as well as speed the preparation of documentary volumes."<sup>27</sup>

Meanwhile, the ADE, within a few years after its establishment in 1978 as a forum for documentary editors, began printing articles in its quarterly newsletter/journal on the technical aspects of editing. While many editors still used typewriters throughout the 1980s, some such as Larry I. Bland of

the Papers of George C. Marshall had converted to word processing equipment. Writing in 1980, Bland praised the benefits of the phototypesetter and the editing terminal or video display terminal. According to Bland, the new electronic tools gave the editor more control over his product. Revisions were easier to make; different versions could readily be saved; search capabilities provided an important resource; and sending the data to the printer on disk or tape output (machine-readable files rather than typescripts) eliminated printer errors. From Bland's perspective, these new tools "made it possible to rethink and restructure the editorial process." While the George C. Marshall Papers project was one of the first proponents to adapt the new technology tools to its project, it remained wedded to the product of letterpress editions. Relegated to advertising their print volumes on a website catering to a general audience, the Marshall Papers have not chosen to use the Web as the venue for their documents.<sup>28</sup>

Another early convert to computerized text processing was the Henry Laurens Papers project. The then co-editor of the Laurens Papers, David R. Chesnutt, outlined for other editors in 1980 how to convert mid-stream in a project from the typewriter to the computer. Chesnutt envisioned significant savings in time and money in transcribing, preparing the editorial apparatus, and producing volumes and fiche that would derive from adopting a text processing system (composed of a word processor, an optical character reader, a large, central computer, a computer typesetter, and a computer-output microfiche unit). Despite implementing these new technologies, the Laurens Papers' Project took over thirty years to complete, in 2002, its edition of sixteen volumes.<sup>29</sup>

Becoming concerned in the early 1980s with the slowness and expense of many projects, the NHPRC decided to expedite production by adding grants to purchase word processors or mini-computers to its funding application process. On May 4-5, 1981, the Commission sponsored a conference to evaluate

how the grant participants fared with their new technology. The Commission's intention in supporting the use of new technology among the projects was strictly utilitarian—to hasten publication of the printed editions through the elimination of proofreading during production. Several projects demonstrated how efficient the new equipment made the editing process—from transcription to indexing to final production. The Commission termed its experiment in determining the utility of computers a success. It cited the William Penn Papers as the “first historical documents project to proceed through the entire process of publishing, from original transcription to publication, using only word-processing and computer equipment.” The Penn Papers project completed its five-volume edition in 1987 before the era of the Internet began.<sup>30</sup>

By the late 1970s as private funding for historical editing began to dry up and the NHPRC was confronted with more demands from grant seekers, the editing field felt increasingly under siege. When the Andrew W. Mellon Foundation in 1980 received a joint grant request from the Founding Fathers' projects (Adams, Franklin, Jefferson, Madison, and Washington), it recognized that the long-term survival of historical editing was in danger. These projects were taking longer to complete and thus costing more, while government curtailed funding. Accordingly, the Mellon Foundation awarded a grant to the NHPRC for use by the Founding Fathers' projects, but stipulated that a part of the monies was to fund a study of historical editing—encompassing a reevaluation of its practices with recommendations that would speed production. In particular, the study was to assess whether new technological tools could improve the publication process. The report (undertaken by Henry F. Graff and A. Simone Reagor) specifically called on the NHPRC to redirect its current bureaucratic role as grant distributor to one of promoter, “shaping and nurturing the field of documentary editing, including the advocacy of it both inside and outside of government.” In

addition, the report called for self-analysis by the projects and recommended that the Commission encourage editors to use new technology by restricting funding to only those new projects that "can demonstrate that they have incorporated in their plans the appropriate innovations."<sup>31</sup>

In March 1981, the same time that Graff and Reagor completed their report, the Reagan administration's Office of Management and Budget recommended that the president's budget not include the NHPRC's grant program. Fortunately, Congress did not comply, but the fight to restore funding rekindled interest in the Graff/Reagor report's findings that the Commission should spur projects to hasten their publication production by embracing new technology. From 1984 to 1986, Commission staff surveyed NHPRC-sponsored documentary editing projects to determine what automated systems they had adopted. By 1986 it found that almost half were using IBM compatible systems and it further encouraged this transformation by providing lists of software and hardware to the projects.<sup>32</sup>

The NHPRC weathered the budget crisis of 1981 with congressional support but the Reagan administration's continued attempts in 1985 to impose zero funding for the grants' program prompted the Commission to promote new technology as a way to survive the funding cutbacks. In June 1987, the Commission's executive director, Richard A. Jacobs, noted the NHPRC's role in promoting new technology among editions was through "the acquisition of computerized equipment and the adoption of automated procedures for the control of collected historical resources, the transcription and editing of documents, and the preparation of encoded text for the final steps of publication." He confirmed that by 1987 over "85 percent of sponsored editing projects have adopted automated techniques." But, Jacobs asked, what came next? While recognizing that the new technology automated the routine, Jacobs noted that serious doubts remained that it could offer "the means and media for safe long-term retention of society's permanently valuable data."<sup>33</sup>

Frequently living under the threat of cuts, the NHPRC in 1992 found itself confronted with a seven percent reduction in its budget. It decided to protect production at existing projects by not issuing grants for new endeavors and by postponing printing subventions. But this stopgap measure did not bode well for the future of historical editing and both the Commission and the projects recognized that a change in direction was essential.<sup>34</sup>

The emergence of the World Wide Web in the 1990s ushered in a new phase for documentary editing. Previously, projects adopted new technology because it promised cost- and timesaving benefits for those producing letterpress and microform editions. The Web offered projects a new way to fulfill their original mandates—to make America's documentary heritage accessible. The enticement of the Web's potential drew a number of documentary editors to form a partnership to explore electronic publishing.

In an insightful article written in 1995, David Chesnutt, editor of the *Henry Laurens Papers*, extolled the potential of the WWW for making historical documents more available to researchers and teachers. Chesnutt reflected on Julian Boyd's path-breaking role in setting the standards of accuracy and reliability for modern historical editing with his first volume of *The Papers of Thomas Jefferson*. While Boyd established the pattern for editorial standards, accessibility of historical editions remained an elusive issue throughout the second half of the twentieth century. Only a few hundred research libraries held documentary editions, either as books or microfilm, thus limiting their accessibility. Writing in 1995, Chesnutt visualized the challenge of keeping historical editing modern in an age of the digital library. He along with other editorial projects, the Center for Electronic Texts in the Humanities (CETH), and the Text Encoding Initiative (TEI) partnered with the NHPRC and several universities to establish a Model Editions Partnership (MEP) that provided a series of demonstration models.

The partners used TEI, the most sophisticated Standard Generalized Markup Language (SGML) for humanities texts available in 1994, and designed a subset of it intended specifically for historical editions. The partnership sought to devise electronic editions that would accommodate current scholarly editorial practice and post-publication enhancements with non-proprietary standards for files, and thus would be adaptable to the constant changes in technology. In promoting the MEP, Chesnutt envisioned a national database for documentary editions on the Internet.<sup>35</sup>

In the late 1990s, the NHPRC actively embraced the MEP project to develop prototypes for electronic historical editions and funded the multi-year experiment of seven projects. Some of these projects used facsimiles or images of manuscripts, whereas others used transcriptions or live text from their already printed volumes to form mini-editions of documents that were fully retrievable and searchable. The initial experiments with the MEP models used SGML either to access "images and content information" or "describe the text itself and to link the text to content information." Within a few years MEP had embraced the newer markup language, Extensible Markup Language or XML. A subset of SGML, XML has the advantage of providing detailed structure to documents within a more understandable program than its parent. And as SGML, XML surpasses HTML in searching or managing documents. Reporting on the progress of the testing phase of the MEP demonstration project in 1998, the NHPRC predicted that MEP would show that electronic editions could be just as scholarly as print editions and have the added advantages that hyperlinks provide compared to traditional letterpress editions that are restricted by their size and format. In addition, the Commission found that the MEP succeeded in demonstrating that the Web could provide documentary editors with more sophisticated intellectual access than could the traditional letterpress volumes. And it also foresaw that the models developed on the WWW and CD-ROM would steer "the editorial community into the mainstream of

electronic text publication, and [help] lay the foundation for enhanced use of historical editions.”<sup>36</sup>

NHPRC’s current executive director, Max J. Evans, continues to espouse the Commission’s purpose as one of bringing “America’s documentary heritage to the American people.” He notes that having documents on the Internet is another way, besides the traditional methods of books and microfilm, to accomplish this. Mr. Evans has found that today’s users want more than descriptive finding aids, item-level descriptions, and indexes or table of contents from the older media of books and microfilm. In addition, “...they want both images of primary sources AND their full text. And they want it all online, fully searchable, and NOW.” Evans notes that the NHPRC does “support publication projects that use combinations of hard-copy publications, microfilm, and electronic editions (CD-ROM, DVD, and Internet).” The intention is “to increase the use of their works through electronic publishing” and thereby “increase use of our national documentary heritage.”<sup>37</sup>

Today, Jefferson’s hope to make America’s documentary past more accessible is proving to be a legitimate possibility with the Internet. In May 2004, the NHPRC adopted a new strategic plan that included expanding “the distribution of the most important traditional documents in American history.” Among the objectives that the Commission set for itself were to “Accelerate the pace of publication of documentary edition volumes[.] Promote the electronic publication of all new publication volumes; and encourage projects to retrospectively convert completed volumes to electronic form[.]” Where microfilm had been seen in the 1980s as the answer to expensive letterpress editions, now the Commission sees the Internet as the panacea. The difference, however, is that the potential accessibility via the Internet is increasingly expandable. Once questions about the permanence of electronic media are resolved, the future of documentary editing online is assured, but its accessibility to non-scholars remains dependent on its open access. Roy

Rosenzweig, the director of the Center for History and New Media at George Mason University, finds that the Web has democratized history by giving non-scholars a forum. He advocates countering the inaccurate history on the Web by raising the visibility of scholars there and providing "open access to our scholarship to the broadest possible public." What could be more democratic than providing the public with historical documents?<sup>38</sup>

Because the Web has allowed everyone to become their own publisher and put historical documents on the Internet, it is incumbent on professional documentary editors to counter bowdlerized texts with their own editions. Michael E. Stevens, co-editor with Steven B. Burg of *Editing Historical Documents: A Handbook of Practice* (Walnut Creek, CA: AltaMira Press, 1997), in a 2000 article in *Annotation* expressed concern with the lack of standards and peer review among those printing historical documents on the Web. The resulting sites can range the full gamut from professional to sloppy. Stevens proposed several solutions that would ensure better electronic editions: creating standards for publishing documents on the Web and establishing review sections in historical journals to evaluate Web editions.<sup>39</sup>

In response to such concerns about the accuracy of texts placed on the Web, the Association for Documentary Editing (ADE) created a Committee on Electronic Standards (CES) in October 1999 that in 2002 approved a set of minimum standards for electronic editions. This committee "defines an electronic edition as primary source material prepared with 1) rigorous attention to the text, 2) explanatory annotation and 3) an explanation of the editorial practices used on the texts." In addition to stipulating editorial policies as print and microform editions do, the CES contends that those producing electronic editions have added responsibilities. Editors should indicate the methods used to digitize the texts and should explain where and when later emendations and corrections have been made for the benefit of scholars who cite their editions. Electronic editions should also inform the

reader how to access their editions via text-searching and describe the SGML/XML tags used.<sup>40</sup>

Besides defining minimum standards for electronic editions, the ADE-CES distinguishes two types of electronic editions. At a minimum, the ADE recognizes those electronic editions that use a "PDF version of an existing print volume" or an "HTML translation of a set of documents, using hyperlinks to attach individual documents to a table of contents, and annotation to the document texts." While the technology involved in converting to PDF or HTML versions is not complicated and easily learned, the disadvantages of using these formats far outweighs the advantages. These versions display rather than analyze text and thus provide the reader with limited searching capabilities.<sup>41</sup>

In lieu of this basic electronic edition, the ADE recommends that its members consider the more sophisticated data format of descriptive mark-up that enhances the capabilities of electronic text through "advanced searches, textual analysis, and sophisticated display abilities." Specifically, the ADE advises editors to adopt the set of mark-up rules or Document Type Descriptions (DTDs) used by the Model Editions Partnership in either XML or SGML. While admitting that choosing this level of electronic edition is more complicated and would require technical expertise, the ADE-CES contends that the long-range benefits will be "greater longevity and usefulness" of the editions.<sup>42</sup>

The MEP project has existed online for over five years now. But there has been no groundswell for putting editions entirely online. A study of the efforts made over the past seven years by documentary projects in embracing electronic technologies finds only limited progress. In an article in the fall 1997 NHPRC newsletter that reviewed the then current use of electronic technologies among Commission-supported documentary editing projects, Joyce M. Ray gave the URLs for projects with websites. The original MEP editions

comprised seven of the twenty-five editions mentioned by Ray. None of the seven model projects have made any significant use of the expertise developed under the MEP in bringing more than a handful of documents to their websites. No doubt one of the main stumbling blocks facing projects are the significant costs associated with Web development. Of the original seven MEP projects, only the Margaret Sanger and Abraham Lincoln projects currently intend to expand beyond their MEP models. The Lincoln Papers staff envisions both printed volumes and an electronic edition, the latter freely available to the public, composed of images of documents and annotated transcriptions that are fully searchable. The Margaret Sanger Papers project initially planned that its website would be an educational and scholarly resource as well as an advertisement for its publications. Yet in 1998 the Sanger project website provided online documents only as examples of its editorial method. Wedded to selling their microfilm sets, editors at projects such as the Sanger Papers worried that electronic versions would slow sales. Calibrating the timing about when to make documents or indexes accessible on the Web also concerned this project. Editor Cathy Moran Hajo, writing in 1998, recognized that access via the Internet to the Sanger microfilm index guide would greatly assist researchers but at the cost perhaps of stifling sales. She noted that the determination to go online would have to be a marketing decision made after sales of the printed guide tapered off. While the Sanger project has not yet chosen to have a Web version of its guide, it does provide researchers with online links to institutions within the United States and abroad that have copies.<sup>43</sup>

Having completed two microfilm editions in 1996 and 1997 respectively, the Sanger Papers project has published one letterpress volume of a projected four-volume series of this reformer's selected papers. While continuing to work on the book series, the project has also embarked on producing a Web-based edition, *The Speeches and Articles of Margaret Sanger (1911-1959)*.

Having selected over six hundred documents, the Sanger staff is preparing them for online publication under the auspices of New York University's Studio for Digital Projects. The editors intend to enhance the accessibility of their documents by using the XML encoding system developed by the MEP to search by title, date, publication sources, type of document, subject, and content. While setting a 2009 projected publication date for the fourth and final letterpress volume, the project has not determined a start date for its free access electronic edition.<sup>44</sup>

Of the other eighteen projects with websites mentioned by Joyce M. Ray in her 1997 survey of the use of electronic technologies among documentary editing projects, only a few have made notable strides in producing online editions. Most still use their websites to promote their traditional letterpress editions and offer only a sampling of documents, some with facsimiles or transcriptions, some with both. The *Adams Family Papers: An Electronic Archive* has made great strides in fashioning an extensive selection of images of manuscripts alongside the corresponding transcriptions. But the editors forthrightly note that their site is not an online documentary edition. Its adherence to a HTML format restricts its capabilities to search.<sup>45</sup>

By far, the Thomas A. Edison Papers have the most comprehensive electronic edition of all those projects mentioned by Ray in 1997. Dating from 1978, the Edison Papers project is producing both selective letterpress and microfilm editions and an online component consisting of 180,000 document images, a database of 121,000 document records and 19,250 names, and a keyword search of 4,000 volume- and folder-descriptions. Furthermore, this digital edition will eventually include all of the material from the microfilm and book edition. While it is the most important resource for Edison researchers, the Edison Papers project does not use the more robust XML data structure. So, while they are making the wealth of the Edison

collections available, they are not using the new technology to its fullest potential.<sup>46</sup>

Before discussing whether documentary editing is at a crossroads in this digital age, a retrospective look at the projects supported or endorsed by the NHPRC in the second half of the twentieth century will demonstrate trends in the types of editions produced. This author surveyed the information compiled by the NHPRC on 271 projects and found that through 1999 they had published some 841-letterpress volumes, and 10,247 microforms (8,437 reels and 1,810 fiche). The heyday of microform production took place in the sixties and seventies with a precipitous decline in that type of edition occurring in the nineties. Initially the NHPRC, after receiving its grant-making authority in 1964, supported microphotography to preserve important collections, but soon saw that medium's potential as a cheaper substitute for book editions. In addition, Ann D. Gordon found in her 1992 study of historical documents study that most researchers lack the resources to pursue widely scattered collections on their own. Therefore, groups such as the Black Abolitionist project provide "an efficiency of scale" by producing microfilm of this material. Yet Dr. Gordon found that while researchers in the late twentieth century had come to rely on microforms of historical sources, they did not relish using the medium because of the variable quality of the microforms and their dependence on quirky machines to read them. Comparing microform and book editions, Dr. Gordon found that while researchers valued the increased availability of sources derived from microform editions, they also lamented the loss of the level of annotation and the deficiency of guides found in those editions. Making documents both accessible and searchable remained the researcher's dream.<sup>47</sup>

With the costs of producing editions rising and federal funding declining, documentary editors must continually seek new sources for revenue. A study of four projects (Thomas A. Edison, Margaret Sanger, Eleanor

Roosevelt, and Dolley Madison) illustrates both the traditional and the innovative approaches that projects are taking to fund their electronic editions. Because of the corporate ties of its subject, the Thomas A. Edison Papers project has succeeded in soliciting support from the business community. With a mixture of funds from corporations and public and private foundations, the Edison Papers are producing both selective letterpress and microfilm editions and an online component of images and a database. Not all projects have attracted such significant grants. Some such as the Margaret Sanger Papers, which dates from 1985, have benefited from their association with a university. The Sanger Papers have drawn on the resources of New York University for editorial assistance from a cadre of student interns, and for technical assistance from the University's Studio for Digital Projects and Research. The latter is assisting the editors to develop an online edition of 600 of Sanger's speeches and articles. This digital project will be free to the public, but the hope is that it will also generate interest in purchasing the comprehensive microfilm edition and the new selective letterpress volumes.<sup>48</sup>

The Eleanor Roosevelt Papers project is very new—it only began in June 2000 to collect, accession, and index Mrs. Roosevelt's correspondence dating from her post-White House years. The ER project thus benefited from fifty years of documentary editors' refining their craft and from the Internet explosion. From the start, the ER staff decided to prepare both letterpress and electronic editions; and they committed themselves to a website as the most appropriate way to reach many people, just as Mrs. Roosevelt had in the 1930s with her newspaper column, "I Want You to Write to Me." The ER website currently has components for curriculum-based education programs and samples of her articles, columns, correspondence, and speeches. Eventually it will display Mrs. Roosevelt's 8,000 "My Day" columns. Recognizing that their project lacked both the funds and technical expertise to create a website of

the vast corpus of the first lady's papers, the editors decided to partner with a for-profit, commercial press, Charles Scribner's Sons (a division of the e-research and educational publishing company, Thomson Gale) to create scholarly print and electronic editions, the latter to be distributed to libraries across the nation. The Roosevelt editors anticipate that this partnership will assure a widespread audience and solve the financial, technical, and marketing problems that perennially confront documentary editions.<sup>49</sup>

The final project to be surveyed here is the Dolley Madison Digital Edition (DMDE), which, like the Eleanor Roosevelt Papers confronted the problems of funding an electronic edition by partnering with a press. DMDE is just "off the press" or rather, just "online," having launched its site in August 2004. Intending at first to write a biography of Dolley Madison, Holly C. Shulman decided first to collect the first lady's papers, and this effort culminated in the 2003 publication, *The Selected Letters of Dolley Payne Madison* (Charlottesville, VA: University of Virginia Press, 2003). Recognizing that the print medium afforded the best venue for extended essays contextualizing some 300 documents, Dr. Shulman also saw that the digital medium would excel in creating a fully searchable site for the over 2,000 documents that lay on the cutting-room floor.<sup>50</sup>

This digital edition currently contains 700 of a projected 2,500 documents that are rendered in full compliance with the standards set by the Association for Documentary Editing and in an electronic environment that is fully searchable and displayed in an elegant site. Intending from the beginning to publish in both the print and digital media, Dr. Shulman maintains the same scholarly standards both for selecting and transcribing letters. The added value that digital publishing brings is the ability "to perform complex queries and searches on the content of the letters." The Dolley Madison site uses XML markup tags (derived from the MEP data-format

scheme) that are then stored in an XML-based database where further XML programming can perform searches using combinations of persons, topics or full-text.<sup>51</sup>

Dr. Shulman's desire to have a documentary edition that meets not only scholarly standards but will also be a permanent publication steered her to the Electronic Imprint (EI) division of the University of Virginia Press. The Rotunda Collections series of electronic publications within the EI has established both literary (Nineteenth Century Literature and Culture) and historical (American Founding Era) components. The Dolley Madison Digital Edition is the debut title in the latter grouping. The press intends to provide full-text searches across all of its publications. EI defines digital scholarship as a publication that:

(1) exists in digital format....(2) is incapable of being translated without loss of information or value into a non-digital format, such as that of a printed book, because it makes use of media, tools, structuring, or other features of computer presentation that cannot be conveyed in any other medium; and (3) is subject in all other respects to the demands of traditional print scholarship for originality, value, and selection via a process of peer review.

The Dolley Madison Papers project decided to publish its digital edition with the EI because it could benefit from its technical expertise and have the assurance of a stable, permanent publication site. But the costs of designing and maintaining a Web-based digital edition must still be recouped. Free consumption is not a viable solution in an era of declining budgets. The EI intends to recover its investment with a seven-tier, graduated subscription payment ranging from a low of \$145 for high schools to \$545 for members of the Association of Research Libraries. The non-profit University of Virginia Press anticipates that this one-time charge coupled with a yearly maintenance fee for institutions, but not individuals, will enable it to provide the public with its historical heritage "enhanced by the flexibility and access afforded by digital technology."<sup>52</sup>

If the goal of the historical editing community is to democratize history by bringing more of America's heritage to the public through documentary editions, then charging fees only limits access. The promise of digitizing history lies in its retrieval capabilities and its increased accessibility. Subscriptions limit the audience to those with institutional affiliations or private funds. The dilemma is that documentary editions cannot exist on no-cost consumption. Perhaps more innovative payment options will surface as more editions confront the costs of going digital. In a few years the University of Virginia Press will also publish a digital edition of the Papers of George Washington in its American Founding Era series. Editor in chief Theodore Crackel is hopeful that the press will be able to market the edition to all public school districts at a nominal fee so that the words of the first president will resonate throughout the nation's classrooms.<sup>53</sup>

Julian Boyd's publication in 1950 of the first volume of *The Papers of Thomas Jefferson* reinvigorated the documentary editing field: it "kindled renewed interest in the nation's documentary heritage and set new standards for the organization and presentation of historical documents." Digital editions on the Web can further revitalize the study of American history by bringing America's documentary heritage to more people than the limited print runs of letterpress editions ever could. In addition, as Dr. Daniel Cohen and Dr. Roy Rosenzweig conclude, "digital word searching is orders of magnitude faster and more accurate than skimming through printed or handwritten texts.... Such quantitative digital additions may lead to qualitative changes in the way historical research is done." The Web can democratize knowledge if only the door to the vault is not restricted by pay per view.<sup>54</sup>

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<sup>1</sup> Roy Rosenzweig, "Scarcity or Abundance? Preserving the Past in a Digital Era," *American Historical Review* 108 (June 2003): 761; Henry Wienczek, "A Democracy of Knowledge," *Documentary Editing* 25 (Spring 2003): 11, 13.

<sup>2</sup> Arthur S. Link, "Where We Stand Now and Where We Might Go," *Newsletter of the Association for Documentary Editing* 2 (February 1980): 1; for Jefferson quote, see Thomas Jefferson, *The Papers of Thomas Jefferson*, vol. 19, *24 January to 31 March 1791*, ed. Julian P. Boyd (Princeton, NJ: Princeton University Press, 1974), 287. For a succinct overview of the history of editing in America see, Mary-Jo Kline, *A Guide to Documentary Editing*, 2d ed. (Baltimore: Johns Hopkins University Press, 1998), 3-26; George Washington, *The Writings of George Washington*, 12 vols., ed. Jared Sparks (Boston: American Stationers' Company, 1834-37); Jared Sparks, *The Life of Gouverneur Morris*, 3 vols. (Boston: Gray & Bowen, 1832); U.S. Department of State, *The Diplomatic Correspondence of the American Revolution*, 6 vols., ed. Jared Sparks (Washington: J. C. Rives, 1857); *American State Papers*, 38 vols. (Washington, DC: Gales and Seaton, 1832-61); William Jay, *The Life of John Jay*, 2 vols. (New York: J. & J. Harper, 1833); Charles Francis Adams, *The Life of John Adams*, 2 vols. (Philadelphia: J. B. Lippincott & Co., 1871).

<sup>3</sup> Quote from Kline, *Guide*, 4; Theodore Roosevelt, *The Naval War of 1812* (New York: G. P. Putnam's Sons, 1882); Continental Congress, *Journals of the Continental Congress, 1774-1789*, 34 vols., ed. Worthington C. Ford et al. (Washington, DC: Government Printing Office, 1904-37).

<sup>4</sup> For a discussion of FDR's principal role in establishing these projects, keeping them funded, and seeing them through to publication, see Christine F. Hughes, "Franklin D. Roosevelt, Dudley Knox, and Naval Documents" (paper presented at the annual meeting of the Organization of American Historians and the Council on Public History, St. Louis, Mo., April 7, 1989). The two naval editions were: United States Department of the Navy, Office of Naval Records and Library, *Naval Documents Related to the Quasi-War between the United States and France*, 7 vols. (Washington, DC: Government Printing Office, 1935-38) and *Naval Documents Related to the United States Wars with the Barbary Powers*, 6 vols. (Washington: Government Printing Office, 1939-44).

<sup>5</sup> Kline, *Guide*, 6.

<sup>6</sup> U.S. National Archives and Records Service, National Historical Publications Commission, *A National Program for the Publication of the Papers of American Leaders* (Washington, DC: National Historical Publications Commission, 1951), 1, 4.

<sup>7</sup> U.S. National Archives and Records Service, National Historical Publications Commission, *A National Program for the Publication of Historical Documents* (Washington, DC: National Historical Publications Commission, 1954), 12, 13-27; quotes on 14 and 16.

<sup>8</sup> Jesse Lemisch, "The American Revolution Bicentennial and the Papers of Great White Men," *AHA Newsletter* 9 (November 1971): 7-21, quote on 7; *The Booker T. Washington Papers*, 14 vols., ed. Louis R. Harlan (Urbana: University of Illinois Press, 1972-1989).

<sup>9</sup> Kline, *Guide*, 15; U.S. National Archives and Records Service, National Historical Publications and Records Commission, *Report to the President* (Washington, DC: National Historical Publications and Records Commission, 1978), 12, 13; and National Endowment for the Humanities, "Division of Research Programs Guidelines," quoted in Richard H. Kohn and George M. Curtis III, "The Government, the Historical Profession, and Historical Editing: A Review," *Reviews in American History* 9 (June 1981): 148.

<sup>10</sup> LaWanda Cox, "From Great White Men to Blacks Emerging From Bondage, with Innovations in Documentary Editing," *Reviews in American History* 12 (March 1984): 32;

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for the quote from the Freedmen Project, see their website,  
<http://www.history.umd.edu/Freedmen/>.

<sup>11</sup> Kohn and Curtis, "Government," 149, 148.

<sup>12</sup> G. Thomas Tanselle, "The Editing of Historical Documents," *Studies in Bibliography* 31 (1978): 1-56.

<sup>13</sup> Don L. Cook, "The Short Happy Thesis of G. Thomas Tanselle," *Newsletter of the Association for Documentary Editing* 3 (February 1981): 1-4; quotes, 2; Robert J. Taylor, "Editorial Practices—An Historian's View," *Newsletter of the Association for Documentary Editing* 3 (February 1981): 4-8; quotes, 4, 5; Cox, "Great White Men," 33.

<sup>14</sup> Gordon S. Wood, "Review Essay/Historians and Documentary Editing," *Journal of American History* 67 (March 1981): 874-75.

<sup>15</sup> Barbara Oberg, "Interpretation in Editing: The Gallatin Papers," *Newsletter of the Association for Documentary Editing* 4 (May 1982): 7-9.

<sup>16</sup> U.S. National Archives and Records Service, National Historical Publications Commission, *A Report to the President Containing a Proposal by the National Historical Publications Commission* (Washington, DC: National Historical Publications Commission, 1963), 23.

<sup>17</sup> Wood, "Review Essay," 877.

<sup>18</sup> Lestor J. Cappon, "A Rationale for Historical Editing Past and Present," *William and Mary Quarterly*, 3d ser., 23 (January 1966): 75, 61, 64, 68, 58; Clarence E. Carter, "Historical Editing," *Bulletins of the National Archives*, No. 7 (August 1952): 181-231; Julian P. Boyd, *Number 7: Alexander Hamilton's Secret Attempts to Control American Foreign Policy, With Supporting Documents* (Princeton, N.J.: Princeton University Press, 1964): xv. For an extensive historiographical essay of reviews published in the 1960s and 1970s of some of the major historical projects, see Fredrika J. Teute, "Views in Review: A Historiographical Perspective on Historical Editing," *American Archivist* 43 (Winter 1980): 43-65. Teute found that most historians favored explanatory and interpretive notes that contextualized the documents.

<sup>19</sup> Leonard W. Levy, review of *The Papers of James Madison*, vol. 1, 16 March 1751-16 December 1779 and vol. 2, 20 March 1780-23 February 1781, eds. William T. Hutchinson and William M. E. Rachal, *Mississippi Valley Historical Review* 49 (December 1962): 505.

<sup>20</sup> Charles T. Cullen, "Principles of Annotation in Editing Historical Documents; or, How to Avoid Breaking the Butterfly on the Wheel of Scholarship," in *Literary & Historical Editing*, ed. George L. Vogt and John Bush Jones (Lawrence, Kansas: University of Kansas Libraries, 1981), 86, 84, 91, 92.

<sup>21</sup> Cox, "Great White Men," 38, 39.

<sup>22</sup> Quote on annotation from Henry F. Graff and A. Simone Reagor, *Documentary Editing in Crisis: Some Reflections and Recommendations*. A Report Prepared for the National Historical Publications and Records Commission, March 1981, 12; for more on this report, see p. 19, below; Kline, Mary-Jo, *A Guide to Documentary Editing* (Baltimore: Johns Hopkins University Press, 1987); Beth Luey, *Editing Documents and Texts: An Annotated Bibliography* (Madison, Wisconsin: Madison House Publishers, 1990); Kohn and Curtis, "Government," 151; John C. Burnham, "Reviews of Books," review of *The Papers of Joseph Henry*, vol. 2, November 1832-December 1835, ed. Nathan Reingold, *American Historical Review* 84 (April 1979): 547-48.

<sup>23</sup> Graff and Reagor, "Crisis."

<sup>24</sup> *Ibid.*, 2.

<sup>25</sup> *Ibid.*, 6, 12, 14, 15.

<sup>26</sup> For the appropriations debate, see Charlene Bickford, "Report of the Committee on Federal Policy," *Newsletter of the Association for Documentary Editing* 3 (May 1981): 10-11 and Charlene Bickford, "Federal Policy Committee Reports," 4 *Newsletter of the Association for Documentary Editing* (December 1982): 7; Charlene N. Bickford, "Capitol Hill Update," *Documentary Editing* 7 (March 1985): 20; Gerald George, "New Plans, New Hopes, at NHPRC," 13 (September 1991): 54-55. For articles on this topic in the newsletter of the National Historical Publications and Records Commission, see "OMB Recommends End of Grant Program," *Annotation* 9 (March 1981): 1 and Richard A. Jacobs, "Executive Director's Column: The Budget Pattern," 13 *Annotation* (April 1985): 3.

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<sup>27</sup> "Project Editors Study the New Technology," *Annotation* 6 (July 1978): unnumbered.

<sup>28</sup> Larry I. Bland, "The Editor and Word Processing Equipment," *Newsletter of the Association for Documentary Editing* 2 (May 1980): 4-5; quote, 4; see [http://www.marshallfoundation.org/marshall\\_papers\\_project.html](http://www.marshallfoundation.org/marshall_papers_project.html) for the project's limited presence on the Web.

<sup>29</sup> David R. Chesnutt, "Comprehensive Text Processing and the Papers of Henry Laurens," *Newsletter of the Association for Documentary Editing* 2 (May 1980): 12-14.

<sup>30</sup> "Goodbye Gutenberg," *Newsletter of the Association for Documentary Editing* 3 (May 1981): 9-10; "Over 100 Attend Word-Processing Conference," *Annotation* 9 (July 1981): 2-3; quote, 2.

<sup>31</sup> Graff and Reagor, "Crisis," 21, 18; see also "Commission Receives Study on Long-Term Editions," *Annotation* 9 (July 1981): 1, 10.

<sup>32</sup> "Automated Systems Used by Publications Projects: 1986 Update," *Annotation* 14 (August 1986): 11.

<sup>33</sup> "High Tech—How Shall We Use It Next?" *Annotation* 15 (June 1987): 3.

<sup>34</sup> "Seven Per Cent Reduction in Appropriations Forces NHPRC Program Cuts," *Annotation* 20 (December 1992): 1.

<sup>35</sup> David Chesnutt, "The Model Editions Partnership: Historical Editions in the Digital Age," *d-Lib Magazine*, November 1995, <http://www.dlib.org/dlib/november95/11chesnutt.html>. For a subsequent discussion on the progress of the MEP and Chesnutt's idea for an American Documentary Heritage database, see his 1997 update. David R. Chesnutt, "The Model Editions Partnership: 'Smart Text' and Beyond," *D-Lib Magazine*, July/August 1997, <http://www.dlib.org/dlib/july97/07chesnutt.html>. For more on TEI see <http://www.tei-c.org/>. In 1999 Chesnutt, C. M. Sperberg-McQueen, and Susan Hockey devised a revised technical reference manual for the MEP encoding scheme that suppressed some elements of TEI not used by MEP editions and defined some specialized elements for historical editions that the TEI Guidelines did not address. See *Model Editions Partnership: TEI/MEP Encoding Scheme* Document MEP, W04, Version 3.7, May 3, 1999, (<http://tigger.uic.edu/~cmsmcq/mep/mepw04.html>). Joyce M. Ray, "Electronic Technologies Projects Make Connections," *Annotation* 25 (Fall 1997): 5.

<sup>36</sup> The seven MEP projects were: the Documentary History of the First Federal Congress, the Documentary History of the Ratification of the Constitution and the Bill of Rights, the Papers of General Nathanael Greene, the Papers of Henry Laurens, the Lincoln Legal Papers, the Papers of Margaret Sanger, and the Papers of Elizabeth Cady Stanton and Susan B. Anthony, <http://adh.sc.edu>; "Keeping Us All Up-to-Date," *Annotation* 26 (March 1998): 1; Ray, "Electronic Technologies," 6.

<sup>37</sup> Max J. Evans, "The Executive Director's Column," *Annotation* 31 (December 2003): 3; Max J. Evans, "The Executive Director's Column," *Annotation* 32 (March 2004): 3.

<sup>38</sup> "New Directions," *Annotation* 32 (June 2004): 4; "Cyberchat with Roy Rosenzweig," *Annotation* 32 (June 2004): 19.

<sup>39</sup> Michael E. Stevens, "Educating Documentary Editors: What's Next," *Annotation* 28 (June 2000): 8.

<sup>40</sup>

[http://etext.lib.virginia.edu/ade/committees/electronic\\_minimum\\_standards.html](http://etext.lib.virginia.edu/ade/committees/electronic_minimum_standards.html).

<sup>41</sup> [http://etext.lib.virginia.edu/ade/committees/electronic\\_data\\_formats.html](http://etext.lib.virginia.edu/ade/committees/electronic_data_formats.html).

<sup>42</sup> Ibid.

<sup>43</sup> Ray, "Electronic Technologies," 7-8; selected documents from the following projects were available on the MEP site <http://adh.sc.edu>: Documentary History of the First Federal Congress, Documentary History of the Ratification of the Constitution and the Bill of Rights, Papers of General Nathanael Greene, Papers of Henry Laurens, Abraham Lincoln Legal Papers, Papers of Margaret Sanger, Papers of Elizabeth Cady Stanton and Susan B. Anthony, the Eleanor Roosevelt Papers, the Frederick Douglass Papers, Marcus Garvey and UNIA Papers, Papers of Joseph Henry, Papers of George Catlett Marshall; for the Papers of Abraham Lincoln Papers (formerly the Lincoln Legal Papers, see <http://www.papersofabrahamlincoln.org/About%20the%20product.htm>; Cathy Moran Hajo, "So You Think You Need A Web Page? Designing World Wide Web Access to

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Documentary Editing Projects," *Documentary Editing* 20 (September 1998): 59, 60; the site listing those institutions that have the Margaret Sanger guide is [http://www.nyu.edu/projects/sanger/smith\\_series.htm#Reel%20Guide](http://www.nyu.edu/projects/sanger/smith_series.htm#Reel%20Guide).

<sup>44</sup> For the page outlining the Margaret Sanger publications, see <http://www.nyu.edu/projects/sanger/publications.htm>.

<sup>45</sup> Ray, "Electronic Technologies," 7-8; for the Adams Family Papers, see <http://www.masshist.org/digitaladams/aea/>.

<sup>46</sup> For the Thomas A. Edison Papers, see <http://edison.rutgers.edu/>; Paul Israel, "The Challenge of Editing the Edison Papers," *Annotation* 32 (March 2004): 8-9, 19.

<sup>47</sup> National Archives and Records Administration. National Historical Publications and Records Commission. *Historical Documentary Editions 2000: A Descriptive List of Documentary Publications Supported or Endorsed by the National Historical Publications and Records Commission* (Washington, DC: National Archives and Records Administration, 2000); for the discussion of microforms, see Ann D. Gordon, *Using the Nation's Documentary Heritage: The Report of the Historical Documents Study* (Washington, DC: National Historic Publications and Records Commission, 1992), 64-74, quote, 69.

<sup>48</sup> For the Edison Papers, see <http://edison.rutgers.edu/>; for the Sanger Papers, see [http://www.nyu.edu/projects/sanger/speeches\\_and\\_articles.htm](http://www.nyu.edu/projects/sanger/speeches_and_articles.htm) and [http://www.nyu.edu/its/pubs/connect/fall03/zimmerman\\_xml.html](http://www.nyu.edu/its/pubs/connect/fall03/zimmerman_xml.html).

<sup>49</sup> For the Eleanor Roosevelt Papers website, see <http://www2.gwu.edu/~erpapers/>; Allida Black, "Going Public with Eleanor," *Annotation* 31 (June 2000): 18-19; telephone conversation with Allida Black, November 15, 2004; the anticipated publication date for both the print and electronic editions is 2006.

<sup>50</sup> For an introduction to the Dolley Madison Digital Edition, see <http://rotunda.upress.virginia.edu:8100/dmde/introduction.html>; Dolley P. Madison, *The Selected Letters of Dolley Payne Madison*, ed. David B. Mattern and Holly C. Shulman (Charlottesville, VA: University of Virginia Press, 2003).

<sup>51</sup> Ibid.

<sup>52</sup> For information on the Rotunda branch of online scholarship, see [http://rotunda.upress.virginia.edu/index.php?page\\_id=Home](http://rotunda.upress.virginia.edu/index.php?page_id=Home); for the Electronic Imprint's description of digital scholarship, see <http://www.ei.virginia.edu/digitalscholarship.html>; for the subscription schedule, see [http://rotunda.upress.virginia.edu/index.php?page\\_id=Acquire](http://rotunda.upress.virginia.edu/index.php?page_id=Acquire); for a description of the DMDE's search tools and the quote about digital technology, see [http://rotunda.upress.virginia.edu/index.php?page\\_id=Collections](http://rotunda.upress.virginia.edu/index.php?page_id=Collections).

<sup>53</sup> Telephone conversation with Theodore Crackel, November 9, 2004.

<sup>54</sup> <http://www.princeton.edu/~tjppapers/>; Daniel J. Cohen and Roy Rosenzweig, *Doing Digital History: A Guide to Gathering, Preserving, and Presenting the Past on the Web* (Philadelphia: University of Pennsylvania Press, 2006): chapters 3-8 of manuscript.

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The Papers of Margaret Sanger

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