

PROPOSAL INFORMATION SHEET

The Andrew W. Mellon Foundation

Organization Information	
Date of Submission:	October 7, 2014
Organization Legal Name <i>(as it appears on your IRS determination letter):</i>	West Virginia University
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Fiscal Year End Date	2017

Proposal Information	
Title or Description:	EditMe: An Academic Publishing Platform
Requested Amount:	\$1,000,000
Grant Start Date:	January 2015
Grant End Date:	December 2017

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***person responsible for serving as a proposal liaison and providing reports to the Foundation, if applicable*



West Virginia University

Eberly College of Arts and Sciences

October 7, 2014

Dear Helen Cullyer:

We are writing to present you the final, revised proposal for EditMe: An Academic Publishing Platform, for which we are requesting \$1,000,000 in funding from the Andrew W. Mellon Foundation's Scholarly Communications and Information Technology program.

The primary deliverable for this project is the free, open source EditMe platform, intended for publishing digital and media-rich scholarship. This editorial-management system will be a "turn-key" publishing platform for print-like and scholarly multimedia journals, books, and data sets. The platform includes features that will help editors and publishers provide an accessible, secure, sustainable, flexible, open, free, and collaborative environment for authors and readers, and which will help them engage in building and reading multimedia-rich, peer-reviewed content.

The co-project leaders are Andrew Morrison, from the Oslo School of Architecture and Design, and myself. Our CVs are included in the attached proposal appendices, and Morrison's contact information is

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Additionally, we are collaborating and subcontracting with Bengler, a design and development team with an international reputation in Oslo, Norway. We are conducting our collaboration through Bengler's principals: Even Westvang and Simen Svale Skogsrud. They can be reached at

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Finally, we are consulting with Douglas Eyman from George Mason University. His contact information is

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The EditMe team is eager to move forward with our project. We have read and will respect and follow The Mellon Foundation's grant-making policies, as outlined on its website.

Sincerely,

A handwritten signature in cursive script that reads "Cheryl E. Ball". The signature is contained within a thin black rectangular border.

Dr. Cheryl E. Ball

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EditMe, an academic publishing platform

Summary Description

As scholarly publishing turns more and more towards peer-to-peer review and multimedia-rich work, a platform needs to be developed that can accommodate the range of publishing models that these features introduce. EditMe will be a free, open-access, editorial-management platform that will support the peer review, copy-editing, and publication of multimedia-rich scholarship in the arts and humanities, social sciences, and sciences. We are seeking **\$1,000,000** in funding from the Andrew W. Mellon Foundation's Scholarly Communications and Information Technology program to support building this platform.

The project team recognizes that multimedia-rich scholarship is a growing area of interest in scholarly communication, as academics, journals, and university presses begin regularly experimenting with publishing non-linear and non-print-like scholarly objects. Since the mid-1990s, multiple journals have been experimenting with publishing digital, interactive multimedia as part of the scholarly record. This multimedia has taken several forms, across a spectrum of print-like to fully screen-based, from a majority of alphabetic text and a few images to fully interactive, audio-and video-based websites. Commercial publishers such as Elsevier and Sage have begun offering online appendices where authors can publish multimedia and data content that is supplemental to the print-like articles appearing in their closed-access journals¹. Other journals—mostly those in the humanities—have been included multimedia in more radical ways, such as *Kairos*, *Vectors*, and the *Journal of Artistic Research*, and university presses such as Duke and MIT, which have very recently begun publishing fully multimedia articles and books that have no print correspondent.

The EditMe platform will be designed with a unique editorial workflow that recognizes and values the importance of screen-based multimedia research. What many journals and presses that publish this kind of work lack is an editorial management system that will move a piece of scholarly multimedia through the submission, review, and production processes as a single, scholarly entity. When Alex Juhasz published her screen-based book about YouTube with MIT Press in 2010, she wrote about the editorial process that her work underwent², in which copy editors at MIT Press removed all of her written content from Scalar (the multimedia authoring platform she used to compose and design the book), placed that content into Microsoft Word, and copyedited in that program. Juhasz specifically questioned in her contract with MIT how the “book” would be copy-

¹ Examples of journals with online appendices:

- American Journal of Agricultural Economics: http://www.oxfordjournals.org/our_journals/ajae/for_authors/supplementary_appendices.pdf
- New England Journal of Medicine: <http://www.nejm.org/page/author-center/supplementary-appendix>
- Journal of Politics: <http://www.journalofpolitics.org/authors-of-r-and-r-s>
- Journal of Monetary Economics: <http://jmeonline.org/5-2/authors/appendices-and-supplemental-material/>
- Journal of Consumer Psychology: <http://www.elsevier.com/journals/journal-of-consumer-psychology/1057-7408/guide-for-authors>
- American Journal of Botany: <http://www.amjbot.org/site/misc/ifora.xhtml>
- The Astronomical Journal and The Astrophysical Journal: <http://aas.org/authors/manuscript-preparation-aj-apj-author-instructions>

² See Juhasz's blog post outlining the problems with her contract because of the digital-media nature of her book project: <http://aljean.wordpress.com/2010/06/11/contractual-mayhem-on-the-absurdities-of-moving-from-paper-to-digital-in-academic-publishing/>

edited. She wrote on her blog, “Editing, Proofing: Unclear how this will be done given the unique quality of the material in the Work: i.e. design, words, videos. I certainly want it to be edited and proofed but how and by whom?” This problem – how scholarly multimedia is edited and by whom – has been a perpetual refrain in conversations with journal and press editors moving into multimedia publishing realms. As editor of *Kairos*, project co-director Cheryl Ball has had many such conversations with editors exploring multimedia publishing, and they are often uncertain how to approach editing scholarly multimedia, so they remove written content from a webtext, copy-edit it in another program, and then return that copy to a designed shell. But that is not a good practice.

While this process may sound legitimate to many copy editors and readers, co-directors Ball and Andrew Morrison suggest from 15 years of experience editing scholarly multimedia that separating form and content—or the written content from its design—can potentially introduce hundreds of small errors that must be undone once written content is reinserted into the design of a webtext. Although Microsoft Word is a favorite program of editors worldwide, it is, in the end, a What You See Is What You Get (WYSIWYG) one. Word exists as a GUI interface that formats text in a manner made recognizable to authors, readers, and editors unskilled in working behind the scenes technically. Unbeknownst to most editors who are new to working with scholarly multimedia, Microsoft Word and programs like it introduce invisible code that, once that content is copied from Word and placed into—or back into—a designerly frame, can wreak the layout and production of a text. Consequently, the rhetorical intent and the mediational articulation are not merely compromised but patently violated.

This process of removing content runs counter to the purpose of scholarly multimedia in which form and content are inseparable³. This process also assumes that, in a copy-editing workflow, *it is even possible* to remove the written content from the design of a webtext (e.g., many webtexts take the form of proprietary videos with embedded linguistic content) or that written content *is the only mode of communication that needs copy-editing*. Indeed, as scholarly multimedia becomes an increasingly employed genre of academic publishing, *design editing* will need to be foregrounded in editorial workflows⁴. A design-editing workflow⁵ accommodates evaluation of the rhetorical considerations of a design as a whole while also ensuring a design’s accessibility, sustainability, and usability through attention to the underlying technical specifications of a webtext so that it meets a journal’s access and preservation standards as well as any guidelines specific to the field and to web-based design in general. In other words, design editing ensures that a scholarly multimedia text is not only appropriate in scholarly and designerly ways⁶ but also in technical ways that will allow the piece to be read without significant interruption far into the future. EditMe will provide a mechanism for helping authors and editors understand the importance and usefulness of design and editing for design in multimedia-infused and multimedia-rich webtexts. EditMe’s platform will be the first editorial content management system to be built around the concept of editing form and

³ See Ball, 2004, 2012; Ball & Moeller, 2007; Walker 2006; Wysocki, 2002, etc.

⁴ For more on design editing as a part of the copy-editing process, see Ball (2013) “Multimodal Revision Techniques in Webtexts” Classroom Discourse, available <http://ceball.com/2013/07/11/multimodal-revision-techniques-in-webtexts/>.

⁵ For an example of how *Kairos* (the longest-running scholarly multimedia journal) uses design-editing in the submission and review process, see <http://kairos.technorhetoric.net/styleguide.html#design>

⁶ Here we are taking up Nigel Cross’s (1982) definition from “Designerly Ways of Knowing,” in which he states that design culture, in concert with cultures of the sciences and humanities, values “practicality, ingenuity, empathy, and a concern for ‘appropriateness’” and that the methods for achieving those values are through “modelling [sic], pattern-formation, and synthesis” (p. 2).

content together—scholarly argument *within* a multimedia design, as well as scholarly argument supported by multimedia.

Deliverables

The primary deliverable for this project is the free, open source EditMe platform, intended for publishing digital and media-rich scholarship. This content-management system will be a “turn-key” publishing platform for print-like and scholarly multimedia journals, books, and data sets. The platform includes features that will help editors and publishers provide an accessible, secure, sustainable, flexible, open, free, and collaborative environment for authors and readers to engage with building and reading multimedia-rich, peer-reviewed content.

EditMe’s publishing platform will be built to accommodate a range of online scholarly⁷ venues including

- Print-like journals,
- Multimedia-rich journals,
- Journals that occasionally publish multimedia-rich articles,
- Data-driven journals (and new conceptions of what data publishing might look like),
- Print-like presses, and
- Multimedia-rich presses.

As part of this wide scope of venues, EditMe artifacts will include the capability to process

- Print-like articles, chapters, and books (e.g., word-processing documents, PDFs, LaTeX documents, Markdown, plain HTML, etc.),
- Scholarly multimedia webtexts/articles, chapters, and books (e.g., linked sets of multimedia in any web-compatible combination)
- Interactive PDF-type articles, chapters, and books (i.e., print-like articles with embedded animations, movies, audio, etc.),
- Stand-alone media files (e.g., videos, audio files, slideshows)
- Database-driven installations (e.g., Scalar, Omeka, WordPress, wikis, etc.),
- Data sets, and
- Other file types that may arise in the near future.

EditMe will be built to focus on the submission, editorial review, copy- and design-editing workflows, and front-end publication processes for these types of scholarly content. EditMe will collaborate with and draw on existing, open-source projects whenever possible as we develop this project. For instance, as described in more detail below, we have plans to collaborate with Chris Long and Dean Rehberger, from the Public Philosophy Journal and MATRIX to study whether and how to integrate some of their author and community networking peer-review tools into EditMe.

One of the major benefits of building EditMe the way we propose is that it generates a series of services with single concerns that don’t expose user interfaces, only APIs. For instance, if someone needs a data store API, they can reuse only that part of the project. This is true for major development projects such as Facebook—anything you can do on the Facebook website, you can also do through its APIs (and a lot more). We are proposing to build a platform for composing

⁷ Here and throughout, our use of “scholarly” refers to any kind of scholarly *and* creative activity that an author might count as research productivity in an academic setting.

academic publishing systems, not just a single website or monolithic platform⁸. We're planning on using JavaScript and standard accessible semantic HTML5 on the front end. On the backend, we will probably run Python for the data-oriented back-ends and node.js on the presentation and rendering back-ends.

Why We Need New Editorial Workflows for Digital Scholarship

Scholarly publishing has been rapidly changing over the last decade to include online, open-access, and multimedia content. This change has been concomitant with the rise of popular publishing and social-media platforms on the Web (e.g., Blogger, WordPress, YouTube, Vimeo, Flickr, Tumblr, etc.). However, as popular (non-academic) publishing systems increase their usage of multimedia-based content through image-heavy Tumblrs, annotated audio-streaming SoundClouds, and long and short video embeds on Vine and YouTube, a portion of scholarly publishing venues have begun to consider how print-like scholarship might transition into multimedia-rich scholarship.

While there are no content management systems currently in existence that can help editors and publishers make this transition to multimedia-rich publishing, there are a number of advances that scholarly and creative journals and university presses have made to include rich multimedia content—what we refer to here as scholarly multimedia, or *webtexts*. Webtexts are multimedia-rich, digital, screen-based texts designed to enact an author's scholarly argument. Webtexts can be equivalent in intellectual scope to an article or a book, in which authors design their argument using linked webpages or database-drive platforms, animations, images, audio, video, scripts, programming languages, and written text. A webtext might have 50 interconnected files that live on a journal's server (for archival purposes) as opposed to a word-processing document or PDF with 1-2 image files included as supplemental information and comprising one flattened document. Scholarly webtexts have great potential to be realized as spatial and temporal renderings of research (see Figure 1), not simply near-facsimiles of the print-based journal article or book. The purpose of authoring a webtext instead of a print-based or print-like article is found in the communication potential and additional layers of meaning making that multiple media and networked writing affords.

⁸ This development philosophy forms the backbone of public IT strategy for infrastructure in the US, through a 2012 executive order. See <http://www.whitehouse.gov/sites/default/files/omb/egov/digital-government/digital-government-strategy.pdf>



Figure 1. A screenshot from a multi-chaptered webtext, “Satellite Lamps,” that uses documentary films and galleries of captioned photos (note the horizontal navigation locator in the upper-right corner) to show readers how the authors’ design process, which occurred across several months’ time and in multiple research locations, informed their communication research regarding GPS¹.

In the 15 years that the directors of this project have been editing scholarly multimedia, publishing thousands of webtexts that continually change generic and technological conventions, the difference between editing webtexts and editing print texts has become greater. When webtexts first began publishing in 1996, in a journal called *Kairos* (which has been edited by one of the project directors since 2001), webtexts were little more than plain HTML with written content and a few links. As web design progressed from plain HTML to more image-intensive and aesthetic interfaces, so did the design of webtexts change to mirror the changing histories of technological capabilities on the World Wide Web. In the early 2000s, with the rise of Web 2.0, webtexts began to include more multimedia usage such as linked and embedded audio, linked and embedded video, database-driven work, and combinations of multimedia and programming languages—changes the editors of these journals see daily. Besides *Kairos*, there are currently a dozen humanities- and art-related journals and presses that publish webtexts on a regular basis, if not exclusively so⁹. None of these journals and presses has a content-management system that handles the editorial processing and publication of archive-able multimedia-based content.

⁹ These journals and presses include *Computers and Composition Online*, *Computers and Composition Digital Press*, *Harlot of the Arts*, *Technoculture*, *Journal of Artistic Research*, *Enculturation*, *TheJUMP*, *Vectors*, *International Journal of Media and Learning*, *Journal of Interactive Media and Pedagogy*, *Itineration*, and *Digital Rhetoric Collaborative* (an imprint of University of Michigan Press).

With this daily change in technological capabilities come new guidelines from standards organizations, such as the W3C, on the accessibility and sustainability of web design. These are ones that scholarly multimedia venues must implement in order to remain accessible. Such changes in technology, genre, and design, and the concomitant changes needed to accommodate webtexts in an editorial workflow have created problems for the journals that publish this kind of work. For instance, webtexts and even entire journals go missing through bad archival practices¹⁰. In addition, webtexts stop functioning because the authors used proprietary systems that are no longer maintained for the Web and neither editors nor authors made provisions for such an occurrence¹¹. But those errors also produce knowledge from which multimedia editors can build best practices. Some of these best practices are outlined in the *Kairos* submission guidelines that have been developed through extensive critical practice, and have been adapted for use by several online journals that publish scholarly multimedia, including the *Journal of Interactive Technology and Pedagogy*, *Southern Spaces*, and *Computers and Composition Digital Press*. These venues and others—such as Syracuse University Press, *X/Changes*, *Itineration*, *Journal of Basic Writing*, *CCC Online*, and venues still in the making, such as a design journal out of Bard Graduate Center—have consulted with us over the last decade to learn about and implement *Kairos*'s best practices for publishing scholarly multimedia.

Some of these best practices include requiring authors to submit editable versions of as many design elements of their webtexts as possible for copy and design editing purposes, submitting metadata and transcripts specific to any audio or video content they have, using file-naming conventions and information architectures that are web-friendly, requiring all webtexts to pass accessibility checkers, and mandating that all media files exist on the journal's host server. These are some basic practices that ensure accessibility to editors and readers, now and into the future. The purpose of EditMe is to create a platform that encourages multimedia publishing, implements best practices in media-rich editorial workflows, and keeps this scholarship accessible and sustainable into the future.

Unique Editorial Workflows for Scholarly Multimedia

Editorial workflows necessary for scholarly publishing generally require two parts: *development* and *production*.

The developmental workflow for scholarly publishing typically includes everything that happens once an article or artifact is submitted for consideration by a venue and continues through editorial peer review until a piece is either rejected or accepted for publication. Some venues are beginning to implement models of working collaboratively with authors prior to official submission. *Kairos* and *C&C Online* (as webtextual journal examples) have done this for over a decade, and presses

¹⁰ See Eyman & Ball (forthcoming), "History of a Broken Thing" (in Bruce McComisky's edited collection, *Microhistories of Rhetoric and Composition* with Utah State University Press), which describes the techno-infrastructure failure of the multi-journal special issue on electronic publishing that *Kairos* and four other online journals participated in during the summer of 2002. Of those five journals, *Kairos* is the only one that has continued to publish at its original domain. See, also, Steven Krause's (2007) discussion in "Where Do I List This on my CV?" of the National Council of Teachers of English's removal from the Web of their online journal, *CCC Online* (in which Krause's webtext had been published in 2002)—a move that NCTE repeated in 2013 with its third (failed) iteration of *CCC Online*, due to its lack of technological and social infrastructures for maintaining webtextual work.

¹¹ See Eyman & Ball (2014/forthcoming), "Digital Humanities Scholarship and Electronic Publication" in Ridolfo & Hart-Davidson (Eds.), *Rhetoric and Digital Humanities* (U Chicago Press).

have long done this sort of development work prior to submission of an entire manuscript. Also, the *Public Philosophy Journal* is introducing a community network platform that will move parts of the editorial peer-review process forward in the submission timeline so that authors can be encouraged and their work developed *prior to* official submission. (We discuss our collaboration with that journal's project and team members later in this proposal.) *Hybrid Pedagogy* has another type of developmental workflow (similar to *Kairos* but much more hands-on) in which the editors of the journal work one-on-one with authors, in GoogleDocs, to develop drafts of their articles for publication.

However, generally speaking, the developmental workflow for a print-based, humanities scholarly venue has not changed much in the last century:

- 1) An author submits a word-processing or similar document,
- 2) An editor quickly reviews to see if it's ready for the editorial board,
- 3) If it is ready, she sends it out to two or three reviewers,
- 4) Those readers review the piece independently and write a critique, emailing or mailing it back to the editor, and
- 5) The editor compiles the reviews into a letter, informing the author whether her piece has been accepted, needs revision, or has been rejected for that particular venue.

The production workflow for a typical humanities journal begins once a piece has been accepted for publication and continues until the piece has been published. In this stage of the workflow, an editor

- 6) Copy edits the document herself or sends it to a copy editor to make sure that the grammar, house style, and references are in order,
- 7) Writes the author to clarify anything missing at that point. Often in print-based work, she sends a word-processing document with Track Changes back to the author for clarification or acceptance,
- 8) Sends a clean version of the article to the production house for another round of copy-editing and overseeing by a production editor, and
- 9) The production editor supervises or does the layout of the copy-edited artifacts and the whole publication, sending the final versions back to the author for proofing, and then onto printing and distribution.

The production workflow can change significantly depending on whether a publication is run by a commercial publishing house, a small non-profit house, a university press, an affiliate of the press, a disciplinary organization (large or small), a department, or is an independent entity. For the purposes of this proposal, EditMe is most interested in serving the populations of editors working for independent publishers, smaller organizations and non-profits, departments, or university presses—places, essentially, where production is done in-house because they don't have the resources (human, economic, or technical) of a large commercial publishing house.

The basic developmental and production workflows outlined above are easy enough to follow for scholars who become new editors, either by taking over from previous colleagues or by starting a new publishing venue. And there are several content-management systems on the open-source or commercial market already that support the above, traditional, print-based workflows¹². However,

¹² Open Journal Systems (OJS) is probably the most recognized editorial management system that follows a traditional workflow of submission, peer-review, copy-editing, layout, and publication for print-based articles. We will review why OJS is not a viable option for scholarly multimedia and other (commercial) CMS options in the literature review.

while scholarly multimedia workflows follow the bare bones of these same processes—in that webtexts are submitted, peer-reviewed, and, if accepted for publication, they proceed through some type of copy editing and production process—there are several major deviations necessary to produce rigorous scholarly multimedia. These differences are described below, and start even prior to the editorial process, with an author’s compositional choices.

Submitting Webtexts: Authors design webtexts using any available technology that meets the accessibility and sustainability guidelines of the journal they are submitting to, while keeping their argument at the forefront of that design. Their argument is made through a combination of written content and multiple media.

- Instead of submitting a single Word document and a few supplemental data or image files, a webtext author must design a series of linked, hypertextual pages with as many links, images, CSS, audio, video, JavaScript, PDF, and other files as is needed to make her argument. These files must move through the developmental and production processes as a single block so that the hyperlinks keeping the entire webtext together are not broken.
- Because scholarly multimedia is still a relatively new genre, much more developed feedback is required for authors, many of whom are authoring webtexts as first-time scholars. This makes for a much more recursive composing process for the text, where authors and editors tend to work more closely together to get a webtext ready for submission or publication.
- Authors sometimes submit their webtexts as zip-file attachments. This can be precarious in the age of overzealous spam filters on university mail servers.

Open Reviewing: The process to review webtexts can be the same as for print-based webtexts, even if the criteria for evaluating the two kinds of scholarship are different, such as those items outlined below, but anonymous reviewing¹³ of webtexts is not possible for several reasons outlined below.

- Authors most often submit their webtexts as a URL, using their university website to host the submission. In this case, the authors can be recognized through their URL (e.g., <http://university.edu/college/~facultyname>).
- It is often necessary in scholarly multimedia to include voiceovers or head shots in video, which reveals who the author is to reviewers. It is too cumbersome to scrub media submissions to make an author anonymous and still retain the sense of the author’s argument. Therefore, it is impractical to double-blind, or anonymously, review scholarly multimedia. Peer reviewers will know who the author is.

Collaborative Reviewing: Because of the issues anonymous reviewing presents in scholarly multimedia (as outlined above), open and collaborative reviewing is often done.

- To overcome the potential bias of knowing whom an author is, one long-standing practice is to collaboratively review webtexts among many board members.

¹³ Open review leads to collaborative review. Collaboration in webtextual publishing is drawn from the disciplinary history of writing studies in which webtexts—as a scholarly genre—were first published. Collaborative reviewing has been taken up more recently in the sciences, media studies, and literature, as seen particularly in open- and peer-to-peer reviewing principles exhibited through projects such as ArXiv.org, MediaCommons, and CommentPress, although those projects are print-like in their media usage. EditMe refers to the Mellon-funded Open Peer Review white paper for a more complete discussion and history on this topic.

Collaborative reviews in this environment have shown to be more rigorous and more informative in feedback than traditional gatekeeping peer reviews.

- Innovative technological means besides mailing a manuscript to a reviewer must be used. Some of these means include email listservs and other asynchronous discussion forums, and synchronous forums such as Google Hangouts, Skype, or live-reviewing if editors are co-located.
- During reviews of scholarly multimedia, only a portion of the discussion or feedback is about the written scholarly content. Attention must also be paid to the design of the piece in relation to the author's argument as well as to the technology or code of the piece.
- While, historically editorial board members have had no difficulty writing a great deal about the nondiscursive elements of a webtext, we note that it is incredibly time-consuming to transmediate between design elements and written feedback, but it must be done currently in order to send review feedback to the authors.

Design Editing: Once a piece is accepted for publication, it must go through many more layers of copyediting than traditional print-based scholarship does. While copyediting of the grammar and style, as well as reference checks, are necessary in both print and webtextual scholarship, design editing is also a part of the production workflow and happens before stylistic copy-editing. Design editing attends to the design of a webtext, and allows time for design problems to be fixed before a webtext proceeds to more micro-level copy-edits. It is, by far, the longest and most labor-intensive process in the production workflow¹⁴. Webtexts must be checked for the following:

- Rhetorical appropriateness of their designs, which usually happens in fine-tuned ways such as ensuring that all media usage falls under appropriate permissions or copyright clauses, including fair use, all links are marked in rhetorical ways to lead a reader, and that all media and design elements are non-gratuitous and facilitate or enact the rhetorical and aesthetic argument of the webtext. (Some of this rhetorical work happens during the developmental stage, but sometimes it needs to be fixed or clarified in the production stage.)
- Accessibility includes checking for and adding alt text, long descriptions, and transcripts for media elements, and running the webtext through an accessibility checker such as WAVE.
- Usability includes checking the filenames and information architecture of a webtext to ensure it is standards compliant and cross-browser compatible.
- Technological sustainability includes making sure all the media elements and artifacts used a webtext are archived on a journal's server, proprietary uses of software are freely readable, and technical standards (such as W3C) have been met from a usability perspective so that webtexts will remain readable long into the future.

Version control: Version control in copy-editing print texts can be as simple as using Track Changes, but such features are not available when editing scholarly multimedia. Ghost editing must often be done for webtexts and versions made manually.

- In each stage of the copy editing process, which may include a style check, a reference check, a design edit, editors proof, authors proof, and a final walk-through of the whole issue, versions tracking changes at each production stage must be made to ensure that if changes happening at one stage are incorrect, or files become corrupt during their movement through the system, editors can revert to a previous version quickly.

¹⁴ *Kairos* has a design-editing checklist that encompasses more than 40 points to be checked, and usually fixed, in an author's accepted submission.

- Manually creating and moving copies of a whole webtext after renaming the folder in an alphanumeric sequence is one method of version control. These copies cannot be uploaded to a version control platform like GitHub, which is what most technologists would suggest, because GitHub cannot handle large multimedia files, some of which do need to be edited in the course of design-editing. So, workflow systems need to be in place for a webtext journal to create, name, and move files from one location to another.

Final production, publishing, and citation issues: There are several issues in the final stages of production and in reaching wider audiences through scholarly multimedia:

- Because each webtext is designed in a unique set of technologies and media, there is no standard way to provide author queries or to receive author proofs during the latter stages of production. While there are some typical practices for requesting these changes—such as asking authors to list the file name, URL, or section name of an HTML-based webtext and briefly describe the area in which the change needs to occur or to provide the minute and second of a timeline based text where the change is needed—each webtext is handled on a case-by-case basis, with editors manually making changes before final publication.
- Once when texts are published, only the written content is easily searchable on the Web, unless rich, multimedia-specific metadata has been added to each of the media components. This is a time-consuming process for editors and often requires assistance and information from authors, who find the additional textual requests annoying and confusing. Scholarly multimedia editors see this foremost in the request for written transcripts for audio and video content, although this form of metadata is not required by all multimedia editors, the added structure lends itself not only to more accessible webtexts but also to more searchable and citable webtexts.
- Citations of webtexts rarely happens in print-bound or other webtextual journals, either through reference or remix, except in only the most peripheral ways that focus on the designs of webtexts instead of their overall scholarly import¹⁵.
- Scholarly multimedia cannot be ingested into databases and indexes such as EBSCOhost or JSTOR. These platforms don't have any way of handling multimedia content other than a PDF, which means that scholarly multimedia does not get distributed and cited in the same way as print scholarship, even as it might have greater impact because of the multiple channels of communication it employs¹⁶.

These are just some of the differences in developmental and production workflows between print-based scholarship and scholarly multimedia that EditMe seeks to bridge. EditMe will focus on these unique editorial workflow options and will engage with the *Public Philosophy Journal* (PPJ) project directors, Chris Long and Dean Rehberger, whose current Mellon project focuses on the developmental workflow of scholarly production. Through several conversations with Long and Rehberger, we have come to understand that the PPJ project will focus on community engagement as a means of fostering authors, primarily through a form of open and developmental peer-review that happens prior to submission. That system should be able to be migrated to a more closed system, if needed for EditMe, so that editors have a choice between implementing developmental review before or after submission, or both.

¹⁵ See Douglas Eyman's body of work on citation practices of webtexts, including his forthcoming book, *Digital Rhetoric*, from University of Michigan Press.

¹⁶ While fixing this problem is outside the scope of EditMe as a journal platform (rather than an research database and index), EditMe does plan to provide better metadata and citation tools to users, which will help with scholarly research and search capabilities.

In addition, we understand that the PPJ platform will already integrate Scalar and already has a collaborative editing feature, so EditMe will not work directly on these two features. Instead, we are eager to work with the PPJ team to determine whether their community-building and networking platform will be compatible with and extensible for our scholarly multimedia workflows. If the projects are compatible, we will be able to offer that team a more robust production-oriented workflow, as described in this section, for their journal platform. In other words, both teams understand that Long and Rehberger's primary focus for the PPJ project is on community building as part of a pre-submission *developmental* workflow that feeds into a light journal platform for distributing mostly-print-like publications, and that this project can be complemented by Ball and Morrison's EditMe's post-submission focus on a more robust journal platform that accommodates a wide range of *production* workflows for print-like and scholarly multimedia publications.

Why EditMe is Needed

The EditMe project was born out of the editorial mission to bridge print and digital scholarly publishing realms. Importantly, EditMe aims to reach scholars across different disciplines and knowledge domains to engage in further building the rhetoric and mediational character of scholarly open-access publishing. Resistance against commercial academic publishers (e.g., Elsevier, Sage) is growing due to these corporations' non-transparent "open-access" author fees and their massively bundled subscription plans, which are negotiated privately on an institution-by-institution basis. These costly negotiations have resulted in major universities calling for renewed interest in open-access publishing, a move that many European universities have already made, some mandated by their country's government.

The slew of journals and institutions that signed up for Open Journal Systems (OJS) are testament to interest in expanding the repertoire of scholarly publishing to online realms. OJS is free to download and install, is open-source and regularly updated, and contains a complete workflow for editor-publishers, to include a submissions tracking system, peer-review processes, copy-editing and layout procedures, publishing and indexing options, and some reader tools that facilitate cross-OJS-publication browsing. It is a free, "turn-key" journal platform, which explains why it is so heavily adopted: In the last decade (since OJS became available in 2002), the number of journals using OJS has risen to over 7,000¹⁷—nearly a quarter of the 28,100 scholarly journals worldwide as of mid-2012¹⁸—and the majority of those 7,000 are new journals started by non-commercial publishers¹⁹. However, OJS has its detractors, who express their dislike primarily along two key points:

- 1) OJS lacks the ability to integrate basic multimedia content into its print-like workflow.
- 2) All OJS journals look the same and customization of the standard template is impossible for the lay editor.

Multimedia publishing: Basic multimedia content (e.g., embedded videos) in OJS journals remains elusive. This is primarily because the platform was built for print-like publishing and integrating multimedia requires significant work-arounds that often require an information-technology

¹⁷ see <https://pkp.sfu.ca/ojs/ojs-usage/ojs-map/>

¹⁸ according to *The STM Report* (Ware & Mabe, 2012)

¹⁹ see Edgar and Willinsky (2010) A Survey of Scholarly Journals Using Open Journal Systems. *Scholarly Communication*, 1(2). Retrieved from <http://src-online.ca/index.php/src/article/view/24/41>

specialist (i.e., not usually an editor) to perform²⁰. Typical workarounds, such as linking out to crucial multimedia content, is not an effective archival and preservation practice for any web-based publishing model—as links degrade, important, primary content becomes wholly inaccessible or even completely lost from the Web²¹. Yet editors using platforms like OJS and WordPress have to link out to this content all the time (see Figure 2). WordPress isn't meant to publish scholarly content and has no editorial workflows built into its turnkey blogging platform. It can be modified enough to act as a front-end interface for print-like scholarship, but fails at publishing rich multimedia scholarship because of its overbranding issue.



Figure 2. As seen in this screenshot from The Fibreculture Journal, which moved to a WordPress installation from a manual HTML set-up a few years after the above webtext was published, readers have to be instructed to “click here to open” the interactive text, which then opens in a completely new window that is not at all connected visually or navigationally to the journal itself.

²⁰ There is no published research on the difficulty of integrating multimedia content into OJS, although one of this project’s co-directors has written a white paper on the difficulty of integrating multimedia-based plug-ins to OJS (see Ball, 2014). Also, through dozens of conversations with journal editors who use OJS or who have created their own ad-hoc publishing systems, the project directors have identified the difficulty of multimedia-integration as a key obstacle for moving in this scholarly publishing direction.

²¹ See Eyman & Ball’s “History of a Broken Thing: The 2002 Multi-Journal Special Issue on Electronic Publishing” forthcoming in *Microhistories of Composition* (McComisky, Ed., Utah State UP).

Journal branding: Editors and publishers who use OJS have, basically, one option for what they want their journal to look like (see Figure 3). The default template in OJS is not customizable in any way that changes what it *looks* like—an editor can change the headers, titles, and background color across the top, but the functions and features of the page all remain in the default position. When OJS was being built in the early 2000s, custom style sheets in the form of CSS weren't part of standard HTML practice. So OJS's template design is written randomly into the codebase, which hasn't been overhauled in the intervening decade. This makes customization of a journal's design nearly impossible even for the most advanced PHP programmer, and it means that every single OJS journal looks the same. OJS overbrands whatever journal content it carries, which is one of the main reasons many of the supporters of *EditMe* are eager to leave that system. In an age of beautiful web design, easily tweaked Web 2.0 publishing templates, and social-media-infused readability, having your journal look exactly like 7,000 other journals does a disservice to your authors and readers and scholarly intellectual brand. *EditMe*'s reader interface will be fully customizable for journal-specific branding.



Figure 3. *OJS's ubiquitous interface, with its sage green header, sidebar full of textboxes and links, and a table of contents that mimics traditional print journals.*

This overbranding also happens in other content-management systems being used for publishing, such as WordPress and Drupal, and is especially noticeable in journals that publish multimedia content. Drupal is often considered a go-to publishing CMS for start-up journals, even though it requires a significant amount of hacking and add-ons to make it a “publishing” platform. Only experienced Drupal users can provide technical support for this work, and even in the most successful cases of hacking the system to meet one’s editorial needs can the journal publish embedded, third-party multimedia from sites like YouTube and Prezi. The use of Drupal in these cases brands the journals with a typical Drupal interface (see Figure 4) that over-directs readers to focus on the linked, bulleted interface (e.g., through the constant presence of the Table of Contents

and the main navigation links) instead of on the multimedia scholarly content that *should* be the focal point for the journal. Put simply: the Drupal platform/interface distracts readers from the content they are there to read.

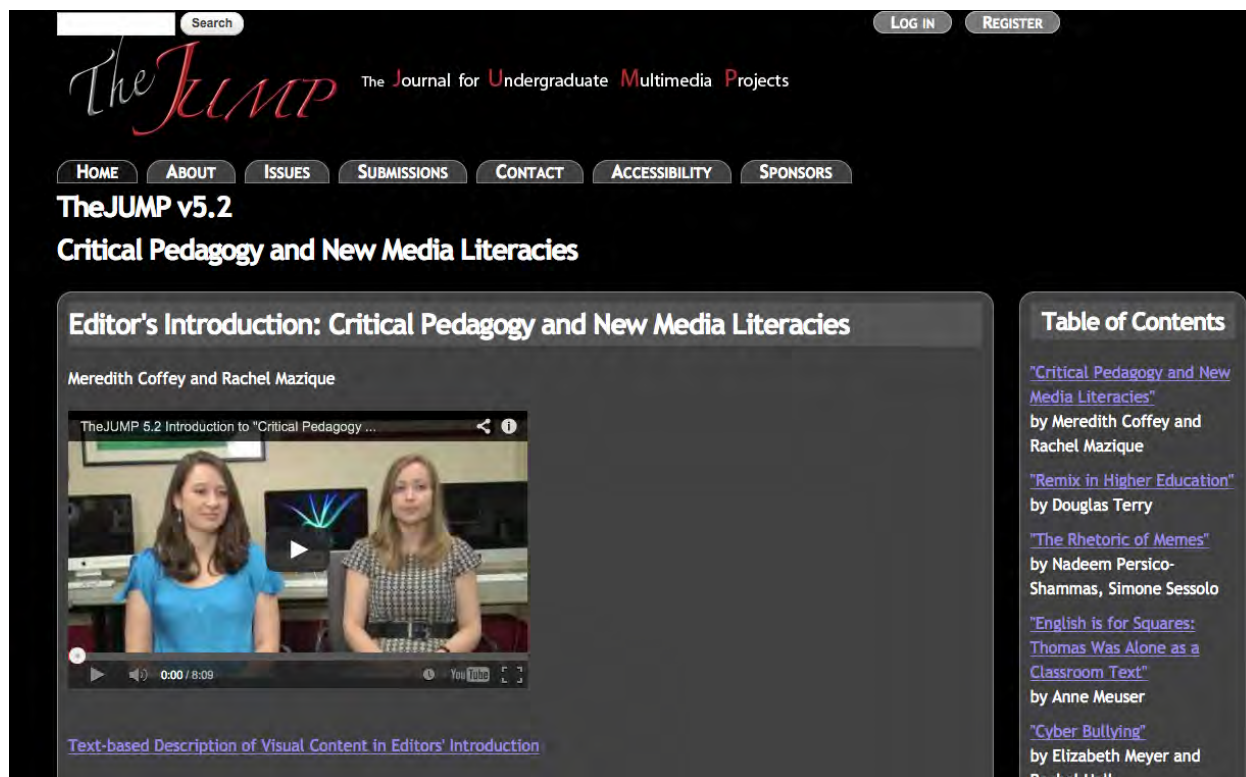


Figure 4. A customized Drupal overlay for a multimedia-based journal still looks like a Drupal overlay, minimizing the designerly aesthetic many journals that want to publish webtexts aim for.

EditMe is not only concerned with the reader interface, but with the back-end publishing system and the workflow issues that are relevant and unique to webtext publishing. This concerns how an editor moves a series of linked files that comprise a webtext through the submission process, adds metadata and complies with accessibility standards, performs peer-review, provides mechanisms for revision, versioning, copy-editing, design-editing, and proofreading, and pushes that content out to readers.

While there are several commercial options for managing these production workflows—such as HighWire’s Bench>Press, bePress, Editorial Manager, ePress, OSPRey, Scholastica, and ScholarOne, which is used by Sage and Taylor & Francis, among other large commercial publishers—these platforms are not open-source, and they have pricing structures that vary from thousands of dollars for installation or hosting to charging authors submission fees for their work. EditMe is wholly opposed to charging either upload or download fees for its use. These commercial platforms also cannot handle multimedia content in the ways we have been describing. So we have chosen not to include more robust reviews of their technical operations in this proposal, as they are not models we espouse.

EditMe Features

EditMe will be built as an infrastructure made from a series of APIs that are modular and re-usable, so that the platform is endlessly flexible. Our goal in developing the infrastructure is to create apps that are re-usable across multiple platforms. Such an API-centric development paradigm not only lends itself to creating ecosystems (instead of monolithic websites, such as OJS) and maximizing use value under unforeseen circumstances, but that other developers can build new front-ends for other contexts and devices — apps. EditMe will include some editorial workflows that are typical for all types of scholarly publication, such as author login, submission upload, metadata inclusion, submission tracking, peer-review, and content publication.

We hope to adopt several of these baseline features from PPJ's journal platform (if they are compatible) and adapt them to multimedia-rich use, if that functionality is not already built in. There is nothing better than working open-source software that we can use: It provides efficiencies when building things. On the other hand, if we use a piece of functionality from another project, it gets incorporated into our platform and we have to do our own maintenance, something which can be a lot more expensive than building it yourself. To avoid this, these services need to have APIs. If there are not complete APIs for an open-source project, stripping out the parts we don't need and creating APIs from the remainder would surpass the amount of work of building it from scratch. There is no appropriate way of reusing code in these cases. If it's not specifically engineered to integrate, it has the same kind of resistance to change as the physical, built environment.

In addition to the baseline editorial needs (mentioned above) that an API-driven academic publishing system will provide, the following scholarly-multimedia-based feature list for EditMe was collaboratively drafted in the second quarter of 2014. The team included EditMe project directors Cheryl Ball and Andrew Morrison; Even Westvang and Simen Svale Skosgrud, both of whom are principals at the software development firm, Bengler; and Jørn Knutsen, an interaction design researcher and developer with Bengler. In addition, the press and journal editors who have written letters indicating their support for and potential adoption of EditMe have read this proposal and endorse the features list below. This full list includes features that may already be part of PPJ, indicated by [PPJ] in the list below. If features are not part of PPJ or PPJ features are not compatible with EditMe's infrastructure, the developers will work from their extensive collection of open-source modules for digital publishing and build new open-source modules for features that can't be modified from existing ones. We look forward to working with the PPJ team and will conduct a technical review of their Kora-based platform at the start of the funding period²².

- Authoring workflows, including templates for new multimedia authors
 - Markdown→HTML converters with multimedia options
 - LaTeX, mathematical, and other formulaic converters
 - Scalar and Omeka (and potentially other database) integration [PPJ]
 - Collaborative textual editing [PPJ]

²² If the technical review of PPJ reveals that a majority of PPJ features are not technically compatible with EditMe, the EditMe team will revisit the features list to re-prioritize which of the [PPJ]-noted items need to be moved into the EditMe project development. Priority will be given to addressing features that are specific to the post-acceptance production workflow that is the key need of EditMe. If additional funding is needed to complete these items, the EditMe team will apply for an NEH Implementation Grant (due March 2015) or a Norwegian Research Council research infrastructure grant (rolling deadlines). Additionally, these grants can be pursued to fund development for integrating multimedia-authoring components—such as Scalar and Omeka—if the PPJ implementation of these programs is not already compatible with EditMe.

- Submission-process upgrades:
 - Robust metadata for media elements [PP] through Kora]
 - Built-in Creative Commons/GNU/copyright licensing
 - Version control systems for scholarly multimedia and database-driven work
- Peer-review workflows:
 - Open-peer-review options: closed, individual reviewing; closed, collaborative reviewing; open/public reviewing; crowdsourcing [PP]
 - Peer-reviewer tracking, voting, and accountability options [PP]
 - Synchronous, collaborative reviewing of a webtext
 - Nondiscursive peer-review options (e.g., sticky notes, pen tools, highlight tools, sharing functions) & capturing this data for editors' use. (We plan to look at MediaThread as one option to adopt and will strive to make the annotation tools Open Annotation standards compliant.)
 - Recursive peer-review options (if venues have multiple levels of review)
- Copy- and Design-editing workflow options:
 - For editors to include design-editing stages in their copy-editing process (e.g., from *none* to robust to *custom*) and to decide *when* in the production workflow this happens.
 - For built-in checklists and links to sustainability, accessibility, and usability standards and checkers.
 - To upload/add a design-based rhetorical appropriateness heuristic based on peer reviews
 - To allow for modular, recursive, or fine-grained copy-editing stages with versioning (e.g., style check, references check, fact check, etc.)
- Publishing and Preservation tools:
 - Robust metadata downloadable for searching, indexing, and accessibility [PP]/Kora]
 - Citation tools for multimedia content (to help authors cite digital media content)
 - Long-term preservation back-ends [PP]/Kora]
 - Pointers in the back-end database for long-term media-hosting or streaming options, and linked to media metadata
 - Flexible front-end/reader interfaces for journals branding

Project Team

The EditMe proposal is grounded in scholarly research and editorial expertise of the co-directors and development team and is located within our fields' practice-based traditions of inquiry and a pragmatics of institutional expertise, locally and internationally, as identified in more detail below.

Co-Directors

Cheryl E. Ball, Associate Professor of Digital Publishing Studies, West Virginia University (Department of English). Qualifications include 25 years of experience in scholarly, literary, and trade publishing and editing across print and digital domains. For the past 15 years, Ball has been editor of the longest-running scholarly multimedia journal, *Kairos: Rhetoric, Technology, and Pedagogy* (<http://kairos.technorhethoric.net>), considered the premier journal in its field. She has also been Associate Editor of *Computers and Composition* and Assistant Editor for *College Composition and Communication*. Her research on digital publishing and multimodal communication has translated into receiving several federally funded grants and a Fulbright award, as well as serving on the board of the Council of Editors of Learned Journals, an international

affiliate of the Modern Language Association. Her disciplinary background combines the praxis-based fields of computers and writing, technical communication, and electronic literature—all of which are grounded in principles of rhetorical making, primarily through written communication practices but also through digital and multimodal means. Prior to her academic career, Ball worked for several types of publishing companies (literary, news, advertising, sports entertainment) and translated that production-based knowledge into pedagogical training for publishing students. She combines pedagogical mentoring in the teaching of writing, multimedia authoring, editing, and publishing into an editorial pedagogy through which she trains authors, editors, teachers, and designers into scholarly publishing methods and academic and multimodal literacies. Due to her extensive experience in these areas, she has been invited to lecture and lead workshops across North America and Europe, and in Brazil.

Andrew Morrison, Professor of Interdisciplinary Design, is Director of Design Research at the Oslo School of Architecture and Design (<http://www.designresearch.no>). In directing the Centre for Design Research, he has built a leading European center for transdisciplinary inquiry that melds theory with practice, process with publication. He has led and been a major contributor to AHO's cross-institutional doctoral school and publishes on this as well as on multimodal rhetoric, design-centered inquiry, interaction design and Human Computer Interaction (HCI). Morrison's experience and success in securing large-funded research projects and producing transdisciplinary research that is both computational and communicative has garnered him recognition as a flagship project leader by the Research Council of Norway. Practice based inquiry is central to Morrison's research. He has consistently collaborated with university-based media and computing labs, for example in Norway and South Africa, as well as a long term collaboration with Bengler in Oslo, on projects such as multimodal discourse (MULTIMO project)²³ and social media and the network city (YOUrban Project)²⁴. This has informed related teaching and public events so as to translate and communicate the developmental, formative, and experimental nature of inquiry between culture, technology, and communication that design-based discovery and critique support. Morrison has published widely including multimodal academic communication in print journals in computers and rhetoric as well as online ones in design²⁵. Morrison has worked with hypermedia since its inception, with wikis, social media platforms, and app development, all with diverse commercial partners.

²³ Morrison, A. (2010). *Inside Multimodal Composition*. Hampton Press: Cresskill, NJ; Morrison, A., Westvang, E. & Skøgrud, S. (2010). 'Whisperings in the undergrowth: performativity, collaborative design and online social networking'. In (Eds). Wagner, I., Bratteteig, T. & Stuedahl, D. (Eds.). *Exploring Digital Design*. Vienna: Springer. 221-259.

²⁴ Morrison, A. et al. (2014 in press). 'Breathing life into research mediation'. In Carlin, D. & Vaughan, L. (Eds). *Performing Digital: multiple perspectives on a living archive*. London: Ashgate; Liestøl, G. & Morrison, A. (2014 in press). 'The power of place and perspective: sensory media and situated simulations in urban design'. In de Souza e Silva, A. & Scheller, M. (Eds). *Local and Mobile: Linking Mobilities, Mobile Communication and Locative Media*. London: Routledge.

²⁵ Hansen, L. & Morrison, A. (2014). 'Materializing movement: designing for movement-based digital interaction'. *International Journal of Design*. Vol. 8, No. 1. 29-42; Morrison, A. Tronstad, R. & Martinussen, E. (2013). 'Design notes on a lonely drone'. Special Issue on Design Fiction. *Digital Creativity*. Vol. 24, No. 1. 1-14; Knutsen, J., Martinussen, E., Arnall, T. & Morrison, A. (2011). 'Investigating Hybrid Products. Towards an 'Internet of Products''. *Computers and Composition*. Vol. 28, No.3. 195-204; Mainsah, H. & Morrison, A. (2011). 'African clouds over the Oslo opera'. Special issue in Interaction and Communication Design. *Computers and Composition*. Vol. 28, No.3. 235-245.

Research Assistant

Research Assistant (RA) for Cheryl Ball, filled every academic year by a graduate student in the professional writing and editing program in the English Department at West Virginia University. EditMe responsibilities include creating training and promotional materials in print- and web-based media. This position is paid for by the WVU English department during the academic year and funding is requested from Mellon to pay this position half time during the summers of 2016 and 2017. The job description is attached in Appendix B.

Subcontractors

Bengler: Bengler (<http://bengler.no>) is the software development firm that, with the project co-directors, has begun initial work on designing the infrastructure and interface of EditMe. Morrison and Ball chose Bengler because of their extensive expertise in building publishing platforms that are modular and open-source, and because they understand academic publishing processes and academics' research needs and were able to contribute new ideas and concepts to EditMe during early discussion stages. For over a decade, EditMe project co-director Morrison has been an advisor to Bengler's ongoing work. They have partnered on Norwegian and European-Union-funded research projects such as MULTIMO (on multimodal composition) and YOUrban (on urban youth, social media, and the networked city), as well as on Bengler's massively used platform for local newspapers in Norway and its related commission to provide support for several political parties in the social democratic context of Norway. Amidst a lack of software development talent in Norway, with many companies there and in the US outsourcing development to Central and Eastern Europe,²⁶ Bengler has proven themselves to be the onshore choice when it comes to developing nimble publishing platforms.

Bengler has been building social media software since the early 2000s, have revenue around 10 million Norwegian kroner a year, with financial records dating back 20 years. As one of many social media projects they've completed, they built an online community for the Norwegian cultural fringe called *Underskog*²⁷, which is used by over 20,000 Norwegians. Bengler's primary business the past 6 years has been building social publishing platforms for Norway's largest conglomerate of 70 local newspapers as well as the 400 local chapters of the Norwegian Labour Party. They have 10 employees and have built a comprehensive suite of modular open-source collaboration and content-management components suitable for integrating into large and small scale CMSes for non-profits and corporations.

One example of Bengler's modular design thinking is PebbleStack, which is a "rich toolset and a simple discipline for building applications by composing reusable, distributed, and RESTful services" (see pebblestack.org). PebbleStack was built with the intention to make web-based services reusable, composable, and shareable across any kind of application, and delivered in a public API. Some of the "pebbles" in their toolset include authentication, document storage, messaging, content ranking and media upload, and transcoding, and they have hundreds of others. The idea of Pebbles—or small, modular, and nimble tools on which a developer can build—is one of

²⁶ See <http://www.ciklum.com/best-practices-in-it/how-companies-in-sweden-and-norway-approach-software-development-outsourcing/>

²⁷ For more about this pre-Facebook community, see Morrison, A., Westvang, E. & Skøgsrud, S. 2010. 'Whisperings in the undergrowth: performativity, collaborative design and online social networking'. In (Eds.) Wagner, I., Bratteteig, T. & Stuedahl, D. (Eds.). *Exploring Digital Design*. Vienna: Springer

the main reasons why Bengler was chosen to participate in this project. The major publishing platforms (like those mentioned in the Why We Need EditMe section above) are either closed or, if open-source, they are monolithic (like OJS's codebase), ossified around less-flexible programming languages (PHP and derivatives), and built on software engineering paradigms that privilege the machine over the human. Ball has been discussing building a version of EditMe with programmers in the US for nearly a decade, and each has suggested a programming language or paradigm based on "what they know" rather than on what the project needs and what would be best to sustain such a platform.

Bengler's development approach is radically different in a good way. As they say on their website: "We invent unlikely and interesting uses for technology," *not* "We invent technology." As interaction designers, product designers, software architects, teachers, and novelists, the Bengler principals (Even Westvang and Simen Svale Skosgrud) share a humanistic philosophy that puts the people using their software first. They draw on interactive and collaborative design processes to solve problems for people, which is why Morrison and Ball involved them early on to help sketch out the concept as much as what any literal design might be. Bengler has proven they can learn from previous projects and change strategy when it is needed. They described Origo—a massive social media-publishing platform they created for 400 local newspapers and in use by 10% of the Norwegian population—as a "boundary object" replete with power structures at play for the different parties using it (see <http://bengler.no/origo>). Their use of terms like "boundary objects" are indicative of their academic backgrounds, which is another asset to their working on this project—they can easily reflect on a project, assess it, and change directions before the thought is complete, if needed. That flexibility and timeliness is crucial in a project of this magnitude and this budget. Plus, they are communicative, helpful, friendly, and imaginative, and Morrison's long working relationship with them speaks to their ability to innovate and complete this project. None of these are qualities we have been able to find in other programmers, which is why we have chosen to use Bengler for this project.

The primary employees of Bengler involved with EditMe include

- Even Westvang, principal of Bengler, primary development contact on EditMe project
- Simen Svale Skosgrud, principal of Bengler
- Jørn Knutsen, interaction designer and researcher (PhD in design, AHO)

As indicated in the Schedule of Activities, Bengler will begin developing EditMe immediately upon funding (and have already done a significant amount of research in the preparation of this proposal).

Supporting Journals and Presses [not included in Project Team]

Although the supporting journals and presses will not be employed as part of this funding request, and are not directly working on the project (with the exception of Douglas Eyman, editor and publisher of *Kairos*), their feedback will be solicited at key points in the project (as needed), and user testers will be requested from this group. These supporters have agreed to implement the first working version of EditMe and have written support letters, which are appended.

1. Sandy Baldwin, *ebr: electronic book review*
(<http://www.electronicbookreview.com/>)
2. Kris Blair, C&C Online (<http://www.bgsu.edu/cconline/>)
3. Katherine Ellison and Holly Wills, *Digital Defoe*
(<http://english.illinoisstate.edu/digitaldefoe/>)

4. Doug Eyman, *Kairos* (<http://kairos.technorhetoric.net>)
5. Lisa Ganobcsik-Williams and Magnus Gustafson, *Journal of Academic Writing* (<http://e-learning.coventry.ac.uk/ojs/index.php/joaw>)
6. Byron Hawk, Casey Boyle, and Jim Brown Jr., *Enculturation* (<http://enculturation.net/>)
7. Justin Hodgson, *TheJUMP* (<http://jump.dwrl.utexas.edu/>)
8. Kimon Kerimedes, *Journal of Interactive Technology and Pedagogy*
9. Jeremy Morse, University of Michigan Press, Digital Publishing
10. Carrie Mullen, West Virginia University Press
11. Mike Palmquist, WAC Clearinghouse Press (<http://wac.colostate.edu/>)
12. Cynthia Selfe and Gail Hawisher, C&C Digital Press (<http://ccdigitalpress.org/>)
13. Jesse Stommel, *Hybrid Pedagogy* (<http://hybridpedagogy.com/>)

Institutional Affiliation

EditMe will be supported through West Virginia University (in Ball's capacity as a faculty member employed there). West Virginia University was founded in 1867 and is the flagship institution of the state of West Virginia. In fiscal year 2013, it enrolled 32,348 students across its system. The WVU Board of Governors and the West Virginia Higher Education Policy Commission govern the university. It is classified by the Carnegie Foundation as a doctoral high research university and attracts over \$174 million in externally funded projects annually. WVU is the primary land-grant institution in West Virginia, and one of only 11 schools in the country that are land-grant, doctoral research universities with a comprehensive medical school. There are 13 colleges and schools offering 191 bachelor's, master's, doctoral, and professional degree programs in the arts and sciences; business and economics; creative arts; engineering and mineral resources; human resources and education; journalism; law; agriculture, natural resources and design; dentistry; medicine; nursing; pharmacy; physical activity and sport sciences; plus WVU hosts an Honors College and programs at its two-year affiliate, Potomac State College.

The Eberly College of Arts & Sciences (<http://eberly.wvu.edu>), in which Dr. Ball is located, is the largest college at West Virginia University. The college has 356 full-time faculty and 99 classified staff in 30 academic departments, programs, and centers in the humanities, social sciences, and natural sciences. Some of those centers related to the disciplinary work of this proposal include the Center for Writing Excellence, which sponsors pedagogical initiatives for writing across the curriculum, and the Center for Literary Computing, which hosts interdisciplinary research projects focused on digital innovations in literary studies and new media. Dr. Sandy Baldwin, who directs the CLC, has written a letter of support for this proposal. In addition, the WVU Dean of Libraries, Dr. Jon Cawthorne, has expressed support (in an attached letter) for EditMe and for integrating a new center for digital publishing into the library as a sustainability measure for EditMe (see the Sustainability Plans section for more information.)

WVU will act as the legal grantee to this Mellon award, and, if awarded, the WVU Research Corporation (WVURC) will act as the fiduciary agent for the EditMe project. The WVURC was created as a not-for-profit corporation in 1985 to foster and support research at West Virginia University, and provide evaluation, development, patenting, management, and marketing services for inventions of the faculty, staff, and students of the University. The WVURC receives and administers funds awarded by external agencies for research and other activities and is responsible for helping protect intellectual property through patents, copyrights and licensing agreements for start-up companies based on University research. The WVURC—through the Office of Sponsored Programs—will manage funds issued to WVU and handle subcontracts and consulting contracts

with Bengler and Douglas Eyman (who is consulting on the grant, as outlined in the budget narrative), in accordance with the terms and conditions of the Mellon award. The subcontract serves as the legal, binding document stating the rights and responsibilities of both parties; protects the interest of Mellon as sponsor and WVU as the prime recipient of the award by identifying all necessary requirements, certifications, and assurances required by the sponsor; and demonstrates to Mellon that the prime recipient (WVU) has acted on its behalf in demonstrating proper stewardship. Examples of the subcontract forms and consultant forms (for Douglas Eyman) are included in Appendix C.

Project History

EditMe was born out of ongoing research between Morrison, Ball, and Douglas Eyman (Senior Editor and Publisher of *Kairos*) as well as discussions among a dozen multimedia journal editors (listed above; see letters of support). These discussions made it evident that a new, open-source platform was needed that could accommodate workflows for authoring, submitting, copy- and design-editing, publishing, and reading/citing/remixing of webtext content. These discussions and projects trace the history of working toward EditMe as well as why and how the project co-directors, working with technology developers *Bengler*, can effectively fulfill the mission of building this platform. This background information on the project team's collaborations speaks to their ability to deliver EditMe.

(1) In 2009, project co-director Ball attended a *Vectors Journal* four-week institute, under Tara McPherson's instruction, to build scholarly multimedia using early versions of the Mellon-funded project *Scalar*, which was being built to replace the unsustainable economic model of paying graphic designers to make beautiful (but inaccessible) Flash-based webtexts for humanities scholars. Ball and McPherson had several conversations there discussing the difficulties of using OJS for multimedia work. These conversations also confirmed that webtextual journals such as *Kairos* and *Vectors* as well as journals that occasionally published multimedia content, such as the *International Journal of Learning and Media* which McPherson also edits, were all hand-coding their multimedia issues. These conversations prompted #3 and #4 below.

(2) In October 2009, project co-director Andrew Morrison invited Ball to the Oslo School of Architecture and Design (AHO) to discuss *Kairos* as a creative-scholarly publishing endeavor during an EU-funded research mediation symposium. In the last five years, Morrison and Ball have collaborated on several research mediation projects, culminating most recently in #6, and, in turn, this proposal for EditMe. Our collaborative working relationship crosses time zones and is driven by our shared vision for the future of scholarly publishing and our individual expertise as editors, scholars, technology innovators, and project managers.

(3) With start-up funds (\$50,000) awarded by the National Endowment for the Humanities (NEH) in 2010, project co-director Ball learned (with collaborator and consultant Douglas Eyman) that despite the open nature of Open Journal Systems, the codebase for that platform didn't allow for significant enough modification to make it compatible with multimedia publishing²⁸. One outcome of the NEH grant was a robust set of metadata guidelines for webtext publishing, which will be implemented into EditMe to aid in searchability, accessibility, and sustainability for scholarly multimedia.

²⁸ See Ball's white paper for the grant at <http://ceball.com/2014/07/17/building-a-better-back-end-neh-dh-white-paper/>

(4) Through her role as founder of the Digital Media Editors consortium²⁹ in 2010, Ball renewed ongoing conversations regarding webtextual editorial practices, instigating virtual conversations and conference presentations on webtext accessibility and sustainability, which resulted in best practices shared among editors and, by extension, readers and authors. These editors included Tara McPherson (*Vectors*), Doug Eyman (*Kairos*), Kris Blair (*C&C Online*), Cynthia Selfe and Gail Hawisher (*Computers and Composition* and *Computers and Composition Digital Press*), Bump Halbritter (*CCC Online*), Andrew Murphie and Mat Wall-Smith (*FibreCulture*), and Justin Hodgson (*TheJUMP*). (Since 2010, the majority of Ball's research has been focused on best-practice processes regarding the preservation, access, and sustainability of webtext-based publishing.) These best practices are incorporated into the design plans for EditMe via both large- and small-scale features. On the largest scale, EditMe will provide an editorial platform that makes it possible to sustain and transfer editorial practices among staff and generations of editors--something not managed by most webtext journals currently. As well, the authorial tools built into EditMe will make multimedia publication more accessible to more authors.

(5) In 2012, Ball participated in the Mellon-funded "Open Peer Review" advisory group with *mediaCommons*, which produced a white paper³⁰ outlining current open-review practices and possibilities. One recommendation the group had for building open-review systems included thinking of open review as a door, instead of an on-off switch: a door can be closed (as in traditional, anonymous review), opened by degrees (signifying partially open-review processes, such as *Kairos'* collaborative editorial-board reviews and non-blind review policies), or swung wide open (signifying crowd-sourced reviews, etc.). As part of that recommendation, it was noted that open-review needs to be built around a discourse community, which means it needs to be a choice made between editors, editorial board members, and authors. So, instead of only offering the (traditional) absolute-closed-review process that OJS models through individual, anonymous, and offline reviews performed by chosen editorial board members, EditMe will offer a sliding scale of review options as explained in the EditMe Features list above. This is one example of how we will implement the recommendations from the white paper.

(6) In 2013-14, Morrison supported Ball's Fulbright award to research at AHO, with a focus on building a webtext journal for design-based research called *Designing*--a type of publication venue that doesn't yet exist within design studies. During the year, the project co-directors collaborated on several local research projects which are ongoing: DesDoc (designing doctoral education: a study of pedagogical practices in design PhD programs) and Design Research Mediation (a study of webtextual scholarly practices, including--as a crossover to DesDoc--implementations of electronic theses and dissertations [ETDs] at design- and architecture-based graduate programs). The initial outcome of these Fulbright projects concluded that although a university like AHO has the innovative pedagogical and research practices to envision a journal like *Designing* or ETDs for its students, it didn't have the technological or social infrastructures to support such start-ups. This is the same conclusion scholarly innovation stakeholders worldwide³¹ come to when considering whether or how to include multimedia elements in articles/books, start webtextual journals, or

²⁹ The consortium began in the summer of 2010 as an informal collection of editors from 15 webtextual journals around the world. It was started as a way to share knowledge and best practices specific to media-rich journal publication. Although uptake was minimal over the years, roughly the same group of editors have become supporters of the EditMe project.

³⁰ See <http://mcpres.media-commons.org/open-review/>

³¹ Morrison and Ball have had this conversation with editors and authors about the lack of resources--be it personnel, technology, or motivation to innovate in this scholarly way--in their travels throughout North and South America, Africa, Europe, Australia, and Asia.

incorporate media-rich ETDs into their scholarly workflows. This is where Ball and Morrison decided to pursue EditMe, to build such an infrastructure for academic publishing.

(7) In Spring 2014, Morrison and Ball met with Bengler co-principal Even Westvang, to run the idea of EditMe by him and to see what feedback he had for the co-directors. We confirmed Bengler's interest in the project, began exchanging ideas about the scope of the project, and began writing a proposal for the Norwegian Research Council. The Council deemed building a CMS for a publication like *Designing* to be too experimental for the scope of that award (the innovative extent of which has been used to transfer print-based journals to OJS). We then discovered the Mellon Foundation would fund international collaborations and moved in that direction.

(8) In Summer 2014, the project co-directors met with Bengler co-principals Westvang and Simen Svale Skosgrud, and Jørn Knutsen to further discuss the scope of the project, refine a features list, and create a ballpark development budget. It was Bengler's suggestion to extend EditMe's capabilities to include a full range of publishing options such as multimedia authoring tools and print-to-multimedia conversion tools (including LaTeX converters) that would assist scholars new to incorporating nonlinear elements, thus opening the door to more authors interested in this kind of scholarship. (While PPJ may cover some of these features, this project will retain the ones not covered by that other project.) In addition, their recommendation to make the system usable for print-like publications pushes EditMe into being a usable option for current OJS users. Throughout the second and third quarters of this year, Bengler has collaborated significantly with the project directors to refine and complete the proposal for Mellon.

(9) In preparation for the Mellon grant, we have coordinated proposals with the PPJ team and MATRIX. The EditMe project and development teams have reviewed KORA and the software suggestions the Mellon program officers suggested earlier in the process (MediaThread, etc.) to see which open-source programs might be viable to wrap into EditMe. After discussions with PPJ, we have planned to coordinate a technical review of the PPJ platform, and we will meet in East Lansing or State College at the beginning of the grant period to review individual features needed between both platforms.

Intellectual Property

In accordance with The Andrew W. Mellon Foundation's "Policy on Intellectual Property," the project team for EditMe agrees to adhere to the foundation's goals for advancing scholarship and work in the humanities by offering the EditMe platform as a free, open-source digital tool with an MIT open-source license, for download and use by anyone. Further, the project co-directors

- Represent and warrant that EditMe will solely own all intellectual property created with grant funds, as a result of a contractual agreement;
- Represent and warrant that we have obtained the necessary licenses for third-party content and that the project will not infringe on third-party rights;
- Will make EditMe available according to the terms of an MIT open source license and in open source repositories, and will publicize its creations;
- Provide the Mellon Foundation the right to review the pricing and distribution of any software services, content, and digital products developed with Foundation funds;
- Will maintain any software created for a number of years beyond the term of the grant; and
- Grant the Mellon Foundation a nonexclusive, royalty-free, worldwide, perpetual, irrevocable license to distribute any Foundation-funded software and/or digital

products for scholarly and educational purposes, in the event the grantee cannot complete or sustain the project.

Delivery Options

EditMe will be available to users through two mechanisms: as a free download for self-hosting through the EditMe website and as a paid, hosted version through third-party companies.

Free download option: Following the model of Open Journal Systems and WordPress.org, EditMe will be free for anyone to download a full version of the platform, which they can install on their own servers for web delivery or on third-party hosted servers that they manage. This option requires publishers using EditMe to have some technical knowledge of installing software on their own servers, or to partner with someone (e.g., IT or library staff on their campus) who can manage this technical work for them. Publishers may be paying for self-managed web-hosting through a third-party company (e.g., Dreamhost, BlueHost, 1&1, etc.), but that cost is not affiliated with downloading EditMe for use.

Paid hosting option: Because EditMe will be free, any web-hosting or IT support company that wants to offer hosting of EditMe, for a fee, can do so. This is akin to how WordPress.org works, in that users can download the full version of WP themselves or they can pay for web-hosting in which one-click installations for the full version of WP are offered. We do note that, **unlike** the two versions of WordPress offered (the full version available as a download on Wordpress.org and the more limited package available through hosting directly on Wordpress.com), the EditMe website will only offer a single download, with all available features, not a smaller, lesser version for community or third-party hosting. This is also how Open Journal Systems runs its paid hosting option.

While any third-party hosting and software support company can offer paid hosting for the free software, Bengler has agreed to offer hosting services and technical support for EditMe immediately upon its release. Having this option in place will mean we can better market the software and support users who need immediate assistance in moving to this platform. Bengler's expertise from having developed the platform can be put to immediate use in the service of editors and publishers new to the system, providing a more seamless transition. The free-market economy ensures their hosting rates will be competitive with other companies that decide to host EditMe.

Marketing Plans

Marketing will take a two-pronged approach during the funding period: promotional materials and presentations.

Web- and print-based promotional materials will include creation of an informational EditMe website that will share development updates, expected release dates, educational/training materials including a knowledge base (after release), research related to EditMe, software downloads, links to user journals, links to hosting companies, as well as creation of traditional press releases (for mailing and emailing), stickers, flyers for conference tables, etc. This cost will be taken up after the initial funding period by WVU. Social media (Twitter, Facebook, etc.) will also be used to promote the software, website, and training materials. Personnel for managing these items is covered by in-kind work performed by Ball's students from West Virginia University (in the professional writing and editing program), including a contractually dedicated research assistant who will be responsible for maintaining EditMe's web-based presence.

Conference presentations will reach audiences and send them to EditMe's website for more information, downloads, and tutorials. The conferences that EditMe co-directors will plan to attend (with support from this grant) include:

- American Association of University Presses
- Association of Learned and Professional Society Publishers (ALPSP) International Conference
- SPARC's biennial open-access conference
- ITHAKA
- Conference on Open Access Scholarly Publishing
- Digital Preservation

Sustainability Plans & Future Goals

Although the Project Team sees EditMe as an international endeavor, we recognize that WVU has a better research infrastructure than the Oslo School of Architecture and Design (AHO, project co-director Morrison's university) to host EditMe. Our moving forward under WVU's non-profit banner and research-intensive resource pool is our first step towards preparing a sustainability plan for EditMe that will help it outlast the three-year funding cycle from Mellon. Sustainability of EditMe is our top priority, and the Project Team has discussed several options for ensuring the platform's continuity and relevance over the next decade. We will refine a plan of action throughout the grant period, but here are some details about how that course of action is coming together as we write this proposal.

Since arriving at West Virginia University in July 2014, project co-director Ball has met with stakeholders around campus to discuss several, related digital publishing projects and ideas, including EditMe. These campus stakeholders have included

- Carrie Mullen, WVU Press Director
- Molly Dolan, Digital Scholarship Librarian
- Matt Harbaugh, director of the LaunchLab, an entrepreneurial think-tank on campus
- Jim Watson, WVU Foundation Director
- Janet Boyles, Pre-Award Manager at Office of Sponsored Research
- Katie Stores, Assistant Dean for Research, Eberly College of Arts and Sciences
- Leamarie Herron, Grants Administrator, Eberly College of Arts and Sciences
- Jim Harms, English Department Chair (and Ball's supervisor)
- Jon Cawthorne, Dean of Libraries
- Melanie Page, Assistant Vice President for Creative & Scholarly Activity
- Sandy Baldwin, Director of Center for Literary Computing
- Laura Brady, Director of Center for Writing Excellence

There are now additional persons and groups to meet, including faculty directors of interdisciplinary digital media and publishing programs in the College of Creative Arts and the Reed College of Media (was Journalism). So far, each of the WVU stakeholders she has met with has shown a tremendous amount of support for EditMe, offering suggestions and support for the project as well as possibilities for its sustainability plan.

Details for this plan will be worked out over the course of the grant, but will likely begin with starting a Digital Publishing Institute (DPI) under WVU's banner, which is a goal Ball brought with her to WVU. She has received verbal support from all of the above stakeholders to pursue this

option, and Jon Cawthorne, Dean of Libraries at WVU has supplied a letter indicating his support for hosting such a center in the libraries. The center would house EditMe, among several related digital publishing projects. Further research on this process and potential on-campus and international collaborations will be pursued during the first year of the Mellon funding, to see whether starting this center is the most viable sustainability option.

Grant-seeking and entrepreneurship would be a primary goal of this center, to continue funding research, service, and teaching opportunities. For instance, Ball plans to pursue NEH funding for an Institute in Advanced Topics in the Digital Humanities grant (due March 2015) to sponsor a kick-off workshop that would bring editors to DPI to train on EditMe, but she will also offer tuition-driven workshops for authors interested in learning how to compose scholarly multimedia and digital humanities projects (something Ball has been consulting on for a decade), so that tuition monies can return to the center to support its projects, such as EditMe. Tuition for similar, pedagogical workshops around the country regularly run \$2,000 for a two-week seminar, with long waiting lists every year³².

EditMe would be a funded research project that has service (hosting) and teaching (workshops on it) outreach opportunities, some of which could bring in additional funding for the center and, thus, for continuing technical support on EditMe. The center’s governing organization (to be determined) would take over marketing, promotion, and continuity of the platform after the Mellon funding ends. Likely board members for the center would include the Project Team as well as the editors supporting this proposal and others we discover during the development process, including more international scholars. Morrison has additional contacts in UK, Italy, Spain, Australia, and Hong Kong we can tap to serve on the board. The board would solicit commentary from the community of users and vote on feature suggestions for future versions of EditMe, and the center would be responsible for securing additional funding to upgrade the platform and fix bugs as necessary, and to continue marketing the product through its website and other media. Additional funding may come from NEH’s Digital Humanities Implementation grants, the Norwegian Research Council’s research infrastructure grants, other foundation awards, private partnerships, and from any profits made from the center’s publishing endeavors. Although the continued cost for maintaining and supporting growth in any open-source software is difficult to estimate—depending on uptake (more users, more edge cases discovered, more demands for maintenance, more institutions to cover costs) and external integrations (dependencies tie a platform into other people’s release cycles)—the advisory board for DPI would ultimately have to prioritize maintenance.

Schedule of Activities

The editorial workflow of EditMe will be researched and developed over a three-year period.

2015	Year of Research & Development [responsible party]
1st quarter	Kick-off meeting in Morgantown combined with technical review of PPJ project @ MATRIX [Project Team] Create technical specifications and requirements [Project Team]

³² These intensive, project-driven, and hands-on workshops are modeled on a digital composition and pedagogy institute Ball helped staff for a decade, under the leadership of Dr. Cynthia Selfe, called Digital Media and Composition (at The Ohio State University). They are also similar in concept to the Digital Humanities Summer and Winter Institutes, which cost \$1250 for one-week of instruction.

	Begin design phase (research, data models, frameworks, etc.) [Bengler] Set up promotional website [Ball/Morrison with Bengler]
2nd quarter	Conclude design phase [Bengler] Milestone meeting in Oslo [Project Team]
3rd quarter	Begin document backend development [Bengler] Begin research publications about dev [Project Team]
4th quarter	Complete user, publication, and “blob” backend dev [Bengler] Explore options for starting a Center for Digital Publishing at WVU
2016	Year of Development
1st quarter	Milestone meeting in Oslo [Project Team] Complete switchboard/workflows [Bengler] Begin editorial office dev [Bengler]
2nd quarter	Begin marketing materials design [Project Team + RA] Complete editorial office dev [Bengler] Begin to set up Center
3rd quarter	Begin Article workbench dev [Bengler] Submit to conferences for 2017 [Morrison, Ball]
4th quarter	Milestone meeting in Oslo [Project Team] Continue Article workbench dev [Bengler]
2017	Year of Marketing & Release
1st quarter	Complete Article workbench dev [Bengler] Example journal designs [Bengler, Morrison, Eyman] Begin populating knowledge base [Ball, RA]
2nd quarter	Milestone meeting in Oslo [Project Team] Complete marketing materials design [Ball, RA] User-testing focus group in Morgantown [Project Team & 5 supporting editors] Begin implementation outreach to other supporting editors Continue KB population [Morrison, Ball, RA]
3rd quarter	Begin training video/demos for website [Bengler, RA] Begin conference push [Morrison, Ball] Begin social media coverage [RA] Continue implementation outreach to supporting editors
4th quarter	Continue conference push [Morrison, Ball] Conclude implementation outreach to supporting editors Release [Project Team]

Reporting

Project reporting will be conducted jointly by co-directors Morrison and Ball, with Ball submitting reports to the Mellon Foundation through WVU, according to the schedule as outlined in the project award letter. Working from Mellon's "Grant Reporting Guidelines" document, the co-directors will provide interim reports after the conclusion of each fourth quarter of the grant period, for the first two years, and a final report after conclusion of the fourth quarter of the final year. Assessments for these progress reports will be made in accordance with completion of the Schedule of Activities as listed above. Financial reporting will be conducted on the same time schedule and submitted by WVU in consultation with WVURC, which will act as the fiduciary agent on this project.