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TO: Western History Association Next 50 Years Committee

RE: *Western Historical Quarterly* Future Plans

Dear Colleagues:

Colleen O'Neill and I welcome the opportunity to participate in WHA's effort to rethink the future of our association, and to discuss our visions for the *WHQ* in the next five to ten years. We are ushering in cutting edge scholarship at a pivotal moment in both the field of western history and in the realm of technological change. Our ideas for the future include the transition to a more innovative publishing platform as well as planning for new ways to support editorial staffing needs. Before I describe those goals, let me offer a bit of background about the *WHQ*'s place in the WHA and the parameters within which we must operate. It's important to recognize that any discussion of the journal's future is circumscribed by three related factors:

1. **The Western History Association's Constitution** which designates the *WHQ* as the organization's official journal, outlines the editor's responsibilities, and establishes the structure of the editorial board.¹
2. **The Memo of Understanding between WHA and Utah State University** signed in 1969 and renewed/amended every five years since.² The MOU specifies the journal's editorial mission and content ("will reflect the interests and research of serious scholars of Western North America"); its format (size, pages, layout) and content (three to four "learned articles" and book review, notices, and bibliography of recent articles); print runs, copyrights, and WHA payments; and the professional requirements for *WHQ* editors who, in consultation with their boards, determine final editorial policies. The MOU also spells out USU's responsibilities: support for two half-time editors, copy editor, secretary, and two graduate editorial fellows; office space, supplies, and travel; and manage printing contracts, institutional subscriptions, and accounting.

¹ <http://www.westernhistoryassociation.org/wp-content/uploads/WHA-Constitution-and-Bylaws2.pdf>.

² Copies of the MOU are available to the committee upon request.

3. **The financial situation of WHA, USU, and the *WHQ* itself.** This is a constantly moving target: fluctuating membership numbers alter the per member payments from WHA to *WHQ* while printing costs remain relatively fixed; national and state economic trends impact Utah State University's budget and ability to subsidize non-teaching salaries and operations; those same factors affect *WHQ*'s production costs, postage, advertizing, and institutional subscription revenues; and new online digital delivery systems alter *WHQ*'s revenues as well as labor and technology costs.

The *WHQ* is an organic part of the WHA. As the official journal of the WHA, our mission statement is the mission of the WHA: *"Its purpose shall be to promote the study of the North American West in its varied aspects and broadest sense."*

As Colleen and I look forward to the near future and imagine where we're headed, we recognize that all decisions about the future of the *WHQ*—as a journal and in terms of content—are contingent on USU and WHA budgets and *WHQ* revenues. We can (and do) imagine all sorts of possibilities, projects, and features, but money and labor impose tangible limits. That doesn't mean we can't be inventive within those constraints. We've increase our efficiency with technology, secured outside grants for special projects, and we've simply worked unpaid overtime to make projects happen. But in this particular visioning exercise, for ourselves and your committee, we want to carefully define our visions by (1) what we can accommodate in the next decade given static resources, and (2) what we would like to imagine given the additional time, staff, financial support, and journal space to accomplish those goals.

Electronic Journal. The most significant challenge and opportunity we face is the electronic future of the *WHQ*, both physically and financially. *WHQ* has been involved in online journal delivery since 2001 when we became one of the five original journals of the History Cooperative. In 2003 we took our journal back issues online with JSTOR, and have since added subscription access to parts of our holdings through H.W. Wilson and EbscoHost. Each has returned small annual royalty payments. Even with this online presence, *WHQ* institutional subscriptions declined slowly in the 2000s as libraries cut back. When it became clear in 2009 that the History Coop as a content hosting platform would cease operations in 2010 (the result of increasing technology costs, an inadequate fee structure, and the loss of subsidies in the economic recession of 2008-10), we faced the possibility of our current content disappearing from the web—a death sentence for any serious journal. We explored other online publishing partners, including Oxford and Cambridge presses, as well as JSTOR's new Current Scholarship Program (CSP), which we joined in March 2010.

CSP is a new effort, initiated by JSTOR and University of California Press, to make current and historical scholarly content available on a single, integrated online platform, to provide a single point for librarians and end users around the world to access this content, and to ensure this content's long-term preservation through Portico. CSP transforms JSTOR from a journal archive to a research platform, bringing new functionalities, such as the inclusion of multimedia content and full-text HTML presentation as well as the current PDFs. Beginning with the 2011 subscription year, *WHQ* will be part of an initial offering of 174 titles from 19 publishers with both current and historical content from their published journals available on this redesigned JSTOR platform. We have joined good company, including journals from the university presses

of California, Illinois, Indiana, Nebraska, Chicago, and Penn State, as well as other History Coop journals like *Oregon Historical Quarterly*, *Massachusetts Historical Review*, *Pennsylvania Magazine of History and Biography*, and *Michigan Historical Review*. We are even more heartened that *William and Mary Quarterly*, a journal that parallels *WHQ* in its independent publishing status, decided JSTOR's CSP was the best option.³

JSTOR's CSP offers us a way to remain online with the leader in online academic content, to increase institutional subscriptions, and still provide individual access to WHA members. We've also taken the initiative of increasing our own institutional subscription fees 10 percent. But the costs of the CSP to *WHQ* are substantial, including 25 percent of our online institutional subscription revenues plus other technology fees and changes in our production process and labor. While this shift requires an initial short-term investment, we're banking on the power of JSTOR's marketing and its positive relationship with librarians to broaden our institutional subscription base, particularly internationally. In our studied opinion, this is the best way forward for the *WHQ* and for WHA. Other university presses made us similar offers, but in the long term we see JSTOR as the better partner, offering us the greatest independence, growth potential, and leadership in a rapidly changing electronic publishing environment.

Let there be no misunderstanding, electronic publishing is not a cost-free panacea for associations or journals looking to cut budgets. In fact, as we've discovered (as have American newspapers and the music industry), electronic delivery can create just the opposite effect—increased technology and labor costs paired with a concurrent public expectation that online electronic media are free (the “Why subscribe/become a member when I can get it for free online?” or “Advertizing will cover the cost”-mentality of the modern age). Indeed, the online environment reduces paper, print, and postage costs, and can even alleviate traditional limits on the size and scope of scholarly articles/presentations. But labor costs—the largest part of our budget—will remain the same or increase, especially if we expand the size and scope of the journal. Online or in print, if members want a quality journal with a sophisticated look, human beings will still have to process, edit, fact-check, proof-read, design, layout, transfer, host, and maintain materials on the web. Given that the largest cost of printing is in the labor of print setup, there is little cost savings in reducing the number of journals printed until you eliminate ALL print. Until we (as individuals and as an association) are ready to do that, we will bear the simultaneous costs of both a print and electronic journal. This is in part why university and commercial publishers charge so much for their journal services, both to associations and to institutional subscribers—they recognize the bottom line costs and the profits of selling technological expertise. Developing new scholarship, evaluating manuscripts, coordinating the peer review process, and physical editing will continue to be labor intensive, in either electronic or print format.

The proactive leadership of *WHQ* editors, past and present, helped move us into the digital age in a controlled and thoughtful manner, and has earned the respect of our professional colleagues. Based in part on our History Coop leadership and our integration of graduate education and scholarship, the AHA highlighted *WHQ* and the USU History Department in its second season of

³ On the CSP and journal participants see <http://about.jstor.org/participate-jstor/libraries/current-scholarship-program> and <http://about.jstor.org/content-collections/journals/current-scholarship-program/2011-title-list>. On Portico and digital preservation see <http://www.portico.org/digital-preservation/>.

HistoriansTV promotions.⁴ We are also part of an NEH startup grant (“Sustaining Digital History”) secured by the Center for Research in the Digital Humanities at University of Nebraska-Lincoln to explore born-digital scholarship (collaboration, evaluation, publishing, and accreditation) with a select group of five journal editors at a conference in Lincoln this September 2010. Building from conversations at that conference, we foresee in the next five years evaluating born-digital articles (through peer-review and editorial), and publishing a précis in the *WHQ* of digital material that will be hosted entirely online.⁵

Recruiting Scholarship. As part of our MOU contractual mandate, we actively solicit papers presented at the WHA conference (and by WHA members) for publication in the *WHQ*. We also spend significant time attending other conferences (something we would increase given additional support) and perusing state and national conference programs, then contacting individuals to consider the *WHQ* as a venue for their work and the WHA as an organization reflecting their interests. Each year we send out hundreds of personalized emails. In the process we attract some great essays, raise the visibility of the journal, and promote membership in our parent organization.

One of our challenges is finding, recruiting, and then developing essays each year that speak to the range of different interests in the WHA, and doing so within the bounds of peer review (discussed below). As topics rise and fall in academic activity, so do submissions of those topics. We also face competition for the best work from newer specialized journals, or journals expanding their focus to include the West. Successful recruiting also has a down-side—we end up saying “no” more than “yes” with an acceptance rate of one in six. Our mission and vision is to reflect the excitement of that current scholarly activity yet still remain a “big tent” journal, bringing the best work in these subfields to a broader western audience, watching for emerging fields and modes of inquiry, but always minding traditional western history topics.

Recruiting graduate students and recent PhDs is one of our ongoing imperatives and success stories. Young scholars represent the future of our organization and profession, and produce some of the very best work we publish. The Bert Fireman Award for the best student essay published in the *WHQ* has become a real competition every year, with as many as four of twelve authors eligible for that prize (and several also winning the Winther Award for best *WHQ* article). A list of past Fireman winners is also a who’s who of the WHA.⁶

Along those same lines, we’re committed to increasing funding for our **Graduate Editorial Fellowships** in order to recruit the very best students to our graduate program. Our goal is to expand the number of fellowships from two to three by fully funding the Milner/Butler Fellowship. While a third fellow would increase our production labor, a quick perusal of the names of former fellows also demonstrates the impact of this fellowship within the WHA and history profession.⁷

⁴ See <http://www.historianstv.com/index.php?id=2&vid=170> or <http://www.youtube.com/watch?v=hsEn513tQT4>.

⁵ See <http://cdrh.unl.edu/> and <http://www.neh.gov/ODH/Default.aspx?tabid=111&id=164>. “Born-digital” (in the simplest sense) refers to scholarship that is conceived and produced entirely with an electronic/online platform in mind, rather than scholarship that is adapted to or dressed up with electronic media.

⁶ <http://www.usu.edu/whq/fireman.htm> .

⁷ <http://www.usu.edu/whq/prevfellows.htm> .

Field Notes and Public History. In the last five years we have expanded (from 2 to 3) the number of Field Notes published annually. Field Notes are essays directed toward the art of doing history in a public setting. They are written by people working in public venues, reflecting on their professional experience with, assessment of, or advocacy for a particular subject, place, or resource. We see public history as a growth field, both in terms of the number of jobs available for historians, and in the significance of its role in creating, transmitting, and preserving historic materials and ideas.⁸ This is also reflected in the number of WHA members who identify as public historians—from curators and librarians, to federal employees, to college/university faculty.⁹ While interest in having the *WHQ* publish public history stories is high, we still have to recruit and develop most Field Notes rather than receiving them as unsolicited submissions. In the next five years (given additional resources and journal pages) our goal is to be able to put Field Notes on self-filling submission basis, double the space allocated, and accommodate full length public history articles.

K-12 Outreach. The AHA and OAH (in particular) have identified K-12 teachers as an underserved and underrepresented population by our profession, and TAH Grants have generated renewed conversations between professional historians and K-12 teachers about content and approaches. The “magazine” publications of the AHA (*Perspectives*) and the OAH (*OAH Magazine of History*) are already publishing such information. Given that the WHA lacks such a magazine vehicle (besides the *WHA Newsletter*), we have been approached by and have tried recruiting authors to publish such materials (lesson plans, discussions, research and teaching materials) for K-12 teachers. While the enthusiasm has been high, so far the production reaching us has been nil. Given currents within the profession and WHA, we’re committed to recruiting smart pieces that highlight K-12 materials and methods as regular articles or as Field Notes. Even then, expansion beyond the occasional piece would necessitate additional space.

Special Articles or Theme Issues, particularly ones that develop out of WHA conference sessions, create an academic synergy between the WHA and *WHQ* as well as between and among scholars. Special features in the recent past include the WHA session turned roundtable on Howard Lamar (Summer 2005), the WHA Survey roundtable discussion (Autumn 2007), and the “Gender and Women’s History in the West” issue (Winter 2005), the latter two conceived and initiated by *WHQ* editors. Going back further there are regular examples of published conference roundtables, sessions, and special essays commissioned by *WHQ* editors: for example, our Winter 1999 issue featuring WHA past-presidents reflecting on the meaning of the 1849 California gold rush.

Our editorial experience (going back to every editor since S. George Ellsworth) is that special issues present significant publishing challenges. Some are practical: for example the logistics of organizing multiple individuals and their scholarship through review and revision on a production deadline. Special projects simply take more time, from inception through the

⁸ See the latest statements about the relationship between public history and the academy by the Organization of American Historians, the American Historical Association, and the National Council on Public History, <http://blog.historians.org/news/1073/public-history-recognition-and-reward-in-promotion-and-tenure>.

⁹ See statistics included in “Surveying the Western History Association,” *WHQ* 38 (Autumn 2007): 348, 350-52. Statistics also available at <http://www.westernhistoryassociation.org/archives/>.

editorial process—time that scholar-editors need to weigh against their own research and the reality that editing isn't always valued as “scholarly activity” by administrators or in the profession. Another consideration is how setting aside special issues interrupts the timely publication of independently-submitted cutting-edge research, the heart of our professional endeavor. Double-blind peer review is scholarly best-practice and the hallmark of top-ranked academic journals. When editors begin “creating” essays or setting aside privileged space for individuals or special issues they run the risk of subverting peer review. Too many “packaged” issues can convey the impression that an editorial staff is looking for easy publishing, rather than capturing the latest scholarship. That ultimately diminishes a journal's reputation and scholarly status—we're all familiar with journals where this has happened. Larger journals do have more room to maintain multiple layers and a variety of features. State journals are increasingly short-cutting peer review and scholarly citation for local and popular audiences. But journals of the *WHQ* size and mission have less room to maneuver before risking scholarly reputation.

Taking these professional considerations very seriously, we will continue to initiate special issues and WHA forums as they seem appropriate, while encouraging others to help us organize special projects. Forthcoming examples of these two related activities include:

1. Our initiative to celebrate 50 years of the WHA with a series of essays written by scholars (nominated by our Board of Editors) exploring eleven different fields within the umbrella of western history. Tentatively titled “The Past and Future of Western History: Multiple Strands of Inquiry in a Still Contested Region,” our authors are thinking about the past and future of western history from the perspective of their particular research specialties, how those fields have changed western history, even splintered the field, but also what continues to unify us and make western history and the WHA such a dynamic discipline and association. These essays will appear in the Autumn 2011 issue of the *WHQ* and provide the starting point for a larger conversation in an open session at the October 2011 WHA Conference in Oakland.
2. WHA 2011 program committee member Julianna Maiorana (a UC Santa Cruz grad student) is organizing several conference sessions of young scholars exploring borderlands histories (national and transnational), that we will work with through rigorous peer review to create a special “New Scholars/New Perspectives on the Borderlands” issue of the *WHQ*.

In the longer term, one of our editorial special initiatives is to recruit scholars to produce “state and future of the field” essays that trace historiographic currents and map out directions for future research—something similar to what *WHQ* editors organized with the “New Significance” conference and essays of 1992-1994. Revisiting that touchstone moment with the next generation of young scholars is something we have discussed with former participants, and will pursue as we are able to fund the project. As always, we count on our Board and WHA members for advice, recommendations, and direction in such projects.

Physical Appearance of the Journal. The first *WHQ* redesign appeared in 1994 with our 25th volume. While it seemed appropriate to update the look of the journal after 25 years, the decision was driven by practical factors: the cost of paper and technical problems we had printing that stock; the desire to increase content space without losing the look of the journal,

particularly the “white space” around borders and between lines that makes print easier to read and the page more attractive than dense edge-to-edge printing in smaller, darker leaded fonts. The redesign involved all aspects of the journal, not simply the cover. Quality, continuity, and the dignity of a classic look guided those decisions.

Looking forward, the 50th volume might be another moment to re-imagine our design and logo. Given the substantial costs involved in any redesign, any move must be deliberate and serve functional as well as aesthetic goals.¹⁰ In particular, we must carefully consider how any redesign will work in both paper and digital formats as we transition that direction. Ultimately we will approach these decisions holistically and in consultation with graphic professionals, our editorial board, and WHA officers and members.

Longer Term Planning and Miscellaneous *WHQ* Initiatives. The following is a broader road map for the future, one wholly tied to our second definition of visioning: what we would like to imagine given additional time, staff, financial support, and journal space to accomplish those goals.

1. Restoring full-benefited state funding for our copy editor position, lost to retirement and state budget cuts in 2009.
2. Establish an endowed professorship in western American history tied to the *WHQ* editorship. Development efforts by USU’s Department of History and College of Humanities and Social Sciences are currently underway.
3. Create an integrated reviewer database, manuscript/book review tracking, and editing/production software system, with email functionality. Over the last five years we’ve explored several commercial programs, hired programmers to develop our own, and worked with the History Cooperative and *Journal of American History* to develop and test systems capable of handling the volume and complexity of the multiple elements we track and with the number of simultaneous individual access points needed—this latter point has been the biggest stumbling block. So far (like the *JAH*) we continue to use parallel un-integrated programs because of our concerns about losing track of circulating materials and data.
4. Expanding the number of book reviews we publish per issue. Increasing the size/length, quality, and timeliness of reviews. A related initiative would be accommodating extended Review Essays.
5. Part time position for a dedicated Book Review Editor. Engaging another USU faculty member or collaborating with another university to subsidize that editor. Sending this out of house poses some practical and organizational challenges, but is possible.
6. Part time position for a dedicated Multimedia Editor with advance technical skills, to coordinate our electronic operations, develop new online materials for articles, and work with born-digital projects. Depending on the individual and skills, it might be possible to combine #5 and #6 in a single part time position.
7. A visual arts feature (eg. *Environmental History*’s “Gallery Essay”) or an “Interview with X” feature (eg. *Agricultural History* and *Environmental History*) which could be arranged/produced in-house (as part of the above position) or by contract with an outside special features editor.

¹⁰ The graphic redesign work alone in 1993 cost the *WHQ* \$1600, not including the fiscal and labor costs (and savings) of implementing those changes.

8. Expand our use of color printing/images. A single color signature (16 pages) currently adds \$1500 to \$1800 (an 18-22% premium) to our printing bill for color setup, print, and tip-in. As in all printing, most of that cost is setup and labor, so at a certain point if we pursued full color we would reach an economy of scale (but at a much higher total printing cost).¹¹
9. Expand our use of embedded online multi-media and color presentation—something our JSTOR CSP will allow us to do much more readily.
10. Fund a “*WHQ* Editors’ Choice” Award, to recognize professionalism and scholarly excellence among our authors, including authors of Field Notes and other special issues.

Maintain the WHA-USU-*WHQ* Relationship. This is perhaps the most important matter we attend to on a regular basis, particularly in these difficult budget times. Our goal and firm commitment is to sustain and nurture that mutually-beneficial relationship into the far-future, especially as universities grow less willing to subsidize academic organizations and their journals the way they did 40 or 50 years ago.

As we report to the WHA Council every year, USU’s financial commitment to the *WHQ*/WHA is substantial: approximately \$158,000 in wages (plus 47% benefits), plus space and overhead, with *WHQ* revenues of approximately \$60,000, against the roughly \$26,000 subsidy provided by the WHA each year. As a percentage of *WHQ* support averaged over the last four years (not counting USU benefits and space), USU provides approximately 63%, the *WHQ* 25%, and the WHA 12%. It’s important to note that the WHA subsidy currently falls roughly \$14,000 short of covering basic printing and postage costs; the difference is covered out of *WHQ* institutional subscription, advertizing, and copyright revenues intended by MOU to underwrite editorial operations at USU.¹² At the same time the WHA subsidizes a non-association journal at the same rate it does its own. We look to the WHA to help us nurture our relationship with USU and assure USU that the association is a fully contributing teammate. As recent budget difficulties have demonstrated, there is a limit to the support our university can provide. In that light, it becomes even more important for the WHA to offer concrete acknowledgements of USU’s important contributions to the past and future of the association and the *WHQ*.

Conclusion.

While change is the only certainty, consistency and stability have been hallmarks of the *WHQ*’s forty-one years in print. As the official journal of the WHA established to ensure and support the association’s scholarly status, and as the second most important factor in members’ decisions to belong to the WHA, we take our responsibilities to the organization and membership very

¹¹ Since July we have entered into a contract with a different printer. We estimate a total printing/binding cost savings of 30% over the former contract, with color signatures at a similar savings. We’re aware that this printing savings might be short term—a function of printers desperately bidding for work in this economic downturn—and we are proceeding cautiously, basing our budget projections on the assumption of higher printing costs in the near future.

¹² Copies of our last annual report with detailed financial statement and budget statistics are available to the committee upon request. Costs savings from our new 2010-11 printer contact (see fn. 11 above) should change that subsidy deficit to near break-even in 2010-11 or 2011-12, depending on fluctuating membership numbers and paper/postage costs.

seriously.¹³ Since 1969, *WHQ* editors and staff have shepherded the journal's financial resources and carefully guided it into the electronic future. At the same time we have spotlighted the historiographic revolutions in our field and produced nationally prize-winning articles that bring credit to their authors and to the WHA.¹⁴ As the economics of academic book publishing become more difficult, we foresee articles published in well-established top-rated journals becoming increasingly important for faculty tenure and promotion. We intend to serve that function in both traditional and innovative ways. Our vision for the *WHQ*'s future rests on the solid academic foundations our predecessors established and on our continuing commitment to scholarly and technological innovation.

All best wishes, and thank you for your service to the WHA.



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¹³ "Surveying the Western History Association," *WHQ* 38 (Autumn 2007): 361. Statistics also available at <http://www.westernhistoryassociation.org/archives/>.

¹⁴ See <http://www.usu.edu/whq/awards.htm>.