

Guide to Developing a Curated Publication

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This Guide introduces the intellectual and practical considerations for initiating and sustaining a collaboratively-edited publication that sources and distributes web content. Based on three years of research, design, testing, analysis, and experimentation in aggregating and curating scholarly content from the open web, this Guide introduces important considerations for aspiring editors. A profile of a successful prototype publication, *Digital Humanities Now*, provides an example of how one publication developed intellectual goals and refined editorial processes. A checklist is provided to assist the development of your own publication.

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I. Introduction

Since 2011 the PressForward project has worked to address a paradox in contemporary scholarly communication: the simultaneous abundance and obscurity of informally published scholarship — in particular the “gray literature” of conference papers, white papers, reports, scholarly blogs, and digital projects — [scattered across the web](http://pressforward.org/discovering-scholarship/) < <http://pressforward.org/discovering-scholarship/>>. These genres of scholarly communication are especially important for communities who coalesce around shared topical interests or methods of praxis. In spite of their value, scholars often miss these works-in-progress or reports on lessons learned due to a lack of formal venues for circulation or evaluation.

Our mission has been to develop methods and technologies that enable communities to source, select, distribute, and value this untapped wealth of scholarly communication on the open web. PressForward, therefore, is a four-pronged project that includes:

- [Research](#) on the [websites](#) and [communities](#) that circulate gray literature
- Developing the [PressForward plugin](#): a publication management tool integrated into WordPress that provides a feed reader and editorial workflow for content collection, discussion, selection, and republication < <https://wordpress.org/plugins/pressforward/>>;
- Prototyping a collaboratively-edited publication that highlights recent scholarship, news, and announcements relevant to a scholarly community (*Digital Humanities Now* < <http://digitalhumanitiesnow.org>>);
- Prototyping an overlay journal that highlights sought-after content originally highlighted on *Digital Humanities Now*, materials from institutional and grant agency repositories, and conference presentations that currently lack scholarly venues for wide circulation (the *Journal of Digital Humanities* < <http://journalofdigitalhumanities.org>>).

We developed the PressForward plugin and our experimental publications concurrently in order to iteratively design features and workflows to suit the needs of community-sourced and collaboratively-edited publications. We thus are able to offer a scalable and reproducible publication model for any scholarly community who wishes to distribute high-quality, open content.

Even as we share our initial findings and suggestions based on these years of work, we recognize that our experimental project is part of an ongoing process both at the [Roy Rosenzweig Center for History and New Media](#) and beyond. We look forward to drawing on and contributing to these efforts to capture and facilitate new forms of scholarly communication.

II. Identify Intellectual Goals

The first step is to consider your intellectual goals by asking the traditional journalist's questions in a particular order: what, why, who, where, how, and when?

- **What** content do I want to curate? Is it material that is topical or interdisciplinary, or focused within a particular field or subfield? Is there a specific genre I want to highlight? Is there work that needs a wider audience? Perhaps materials without formal outlets, such as multimedia, reports or reflections on methodologies. Conference papers or works in progress also may be important to you. Or maybe you would like to highlight formally published works deserving of a wider audience? Would unique content, such as commentary or reviews be useful?
- **Why** do I want to do this? What is the intention behind distribution of this content? To collect valuable work in one place? To highlight a variety of work in the field? To aggregate attention on overlooked material? To gather contributions related to a particular event, conference, or panel? To share announcements and goings on?
- **Who** is my desired audience? Is there an existing community that has expressed the need or desire for a new venue? Or is this readership a dispersed community that doesn't recognize its shared interests yet? Does this audience have an existing outlet already? If so, how does it differ from yours? If there have been failed attempts at creating one, do you know why have they not continued? Can you learn any lessons from those attempts? And do you know how to reach your intended audience to let them know about your publication?
- **Where** is the content you want to distribute? Do you have web feeds for the websites, journals, or repositories you want to include? Can you draw on collaborators or the community at large to assemble or expand the source base?
- **How** will you run this publication? Do you have committed collaborators? Can you draw on the efforts of an existing community or will you need to develop a stable of volunteers or employees? How will your website be hosted, by a paid contract or institutional support? Can you confirm any financial or technical support necessary for a trial period?
- **When** will you do this? How many hours a month do you realistically have to give this publication? For what initial period of time will you commit to this project?

After you have thought about these questions then you get to focus on preparing the **source base** and **publication venue**, **establishing editorial criteria**, and **determining workflow**.

III. Establish Sources, Publication Venues, and Editorial Criteria

After you and your collaborators have an initial agreement upon the intellectual goals of your curated publication (namely **what, why, who, where, how, and when**), you will need to **build your source base, develop a web presence** for your publication, and **establish editorial criteria**.

Build Your Source Base

Begin to identify the websites and social media accounts you think will provide valuable content for your publication. By creating a list of the syndicated web feeds (**RSS** or **Atom**) from these sources in an editable spreadsheet such as Excel or Google Docs first, you will be able to adjust and maintain a copy of your subscription list that you can **export as an OPML file** whenever you are ready to set up your feed aggregator. You are not limited to curating content only from these web feeds, however since the PressForward plugin's *Nominate This!* bookmarklet enables user to capture an excerpt and attribution for any content on the open web that gets added to the nomination pool. And as you continue to identify sources that regularly provide content of interest, you can always add to your subscriptions.

Develop Your Web Presence

In order to publish online, you will first need to identify a host for your site and choose a title. You may choose to **pay for hosting** and **buy a web domain** for your publication, or obtain institutional hosting. You should install **WordPress** as the content management system for your site, or choose it from the options provided by your web host. A basic WordPress installation will allow you to create and publish posts, but you can customize your site through the use of **plugins** that provide an easy user interface for additional functionality and control. You will need to install the PressForward plugin to provide the aggregation and review environment.

You can influence the look of your website by choosing a **theme**, and you can either stick with the default setting, or customize it by modifying the layout, fonts, and colors. You can even choose a theme to reflect the intentions of the publication. Perhaps you would like to look like a newspaper, or formal journal? Present a lot of content, or have fewer, larger features? You also can choose ways to build out your site, such as enabling commenting, displaying live feeds from social media, etc.

In addition, you will want to start identifying and creating the social media accounts you wish to use for distribution of your curated content (e.g. Twitter, Facebook, Pinterest, LinkedIn).

As you begin to develop your site you may want to keep the URL private, or have a static homepage, while you practice selecting and publishing contents. You may also choose to keep posts and pages private. Likely you will want to wait until you have established a workflow and confirmed commitment before making a public announcement.

Note: If you are new to WordPress, there are [free resources online](#) and many universities offer training courses.

Establish Editorial Criteria

The best way to develop your editorial criteria is to coordinate a period of time to practice reviewing, discussing, selecting, and republishing content in a private space. Once you have identified your initial source base you can begin to aggregate all your content in the PressForward plugin so your editorial group can review and nominate content for dissemination through your publication. Editors also can suggest additional material they discover on the web via the *Nominate This!* bookmarklet and continue to expand the source base.

As you begin to consider development, you can have editorial conversations using the commenting feature in PressForward or shared documents. In-person or interactive meetings are the most conducive to discussing the selection criteria for the type and quality of material you wish to distribute through your publication. This criteria may include attention to genre, authorship, source, or topic. It also could include consideration of altmetrics (such as number of comments on a piece, number of downloads, or engagement on Twitter).

As you begin to come to some agreement on the desired content for distribution, next consider how you want to [display content on your site](#). Will your readers find a title, snippet, and link? Do you wish to add any additional editorial commentary to contextualize the selections? Will you provide an image, a quote, or something else?

At the same time you practice selecting content, you also should practice [publishing](#) the selections on your private web space to confirm the process. Sometimes seeing material in its published form can help you re-evaluate editorial priorities and determine the best method for presentation. As an added bonus, you will begin to populate your site prior to its public launch.

While you are having editorial conversations about content selection and presentation, you should also spend some time populating the “About Page” on your website. You can draft a version based on your initial editorial goals now and revisit them throughout the process.

IV. Workflow and Logistics

Now that you have thought about the [intellectual goals](#) of your curated publication, and [collected and selected sources](#) within the context of your own publication, it is time to establish the workflow and logistics of running the publication.

Determine Responsibilities and Workflow

As an editorial group you will need to decide the frequency of publication and assign responsibility for the final selections. Must decisions be made as a group, or can individuals make them on a rotating basis? How frequently do you expect participation from editors in the review and nomination process? Will you open any part of the process to volunteers, and on what timeline? Who will oversee the volunteers? What are the expectations and process for editors to communicate? If you plan to publish original content, who will oversee its preparation? Who will handle the public-facing social media accounts and correspondence for the publication?

Establish Community Involvement with Project

You may wish to involve your community in the development of your source base. You can use Google Docs and Forms to provide a list of your current feeds and accept suggestions for new ones (see, for example the “[Nominate](#)” page on *Digital Humanities Now*). The PressForward plugin also will create a new RSS feed of all your incoming content, should readers wish to read all the content you aggregate (for example [all the posts aggregated by Digital Humanities Now](#)).

You may also consider inviting community participation in the nomination or selection process as volunteer editors. If your goal is to develop a community space for discussion, you may allow comments on your website. You also will want to consider whether your source base and editorial board reflect the intellectual goals of the project: to select the most valuable or provocative work, to show diversity and range, to utilize an existing pool of volunteers, a combination of the above, or something else entirely?

Now is a good time to revisit your publication’s “About Page” and make sure that the text still accurately reflects and articulates your goals.

Before the Launch

Before you launch, you will want to fully review your sources, editorial criteria, responsibilities, and workflows. Make sure that you have defined and agreed-upon roles and responsibilities, timelines for publications, and length of the initial trial period.



You also will want to solicit feedback from trusted colleagues on the source base, the selections, the website, and the editorial workflow.

In addition, your editorial group will need to agree upon the timelines for publication and establish the point at which you will review how the publication is working and discuss long-term strategies.

As you come closer to the public launch, you will want to make sure that you have the site ready, you know the outlets where you want to place the announcement, and have specific people in charge of the site launch, public announcements, and responding to queries. Then you can begin to alert members of your community.

After the Launch

Make sure that you continue to review and refine editorial practices as content and editor availability ebbs and flows. You will need to consider the long-term viability for your existing editorial board and how it might be sustained, as well as sources for technical or financial sustainability.

Now that you have some idea of the steps to plan and structure a curated publication, you may be interested to read how *Digital Humanities Now* went through this process over the past two years.

V. Sample Curated Publication

Now that you are familiar with the intellectual and practical considerations for initiating and sustaining a collaboratively-edited publication that sources and distributes scholarship on the open web, this section provides a reference for the technical and editorial processes behind our weekly curated publication *Digital Humanities Now* (*DHNow*) related to:

- Intellectual Goals;
- Source Base and Publication Venues;
- Establishment of Editorial Criteria; and
- Workflow and Logistics.

For the past three years the [PressForward team](#) has been experimenting with methods for catching and highlighting web-based scholarly communication by concurrently developing our *Digital Humanities Now* (*DHNow*) publication and our [PressForward plugin](#) for WordPress. This brief overview of the development of *DHNow* and the PressForward plugin introduces our approach to issues of scope, scale, and value.

It is important to note that nothing about this scholarly communication problem is specific to the digital humanities, and neither is our solution: we prototyped a generic model for any community who wishes to build a lightweight, collaboratively-edited publication both sourced from, and published on, the open web.

Intellectual Goals

What: *Digital Humanities Now* disseminates scholarship and news announcements of interest to the broad, interdisciplinary “digital humanities” community. The topics, approaches, practitioners, genres, formats all vary. All material, however, is informally released. Rather than curating works formally published in journal articles, manuscripts, or association newsletters, *DHNow* curates content that is essentially self-published on the open web. These materials project reports and white papers; reports on research methodologies or results; conference presentations, multimedia productions, working papers, and news announcements. Occasionally there is an editor-curated “round-up” that highlights a group of related works on a particular topic.

Why: The intention behind *DHNow* is to aggregate attention on dispersed, often overlooked material. By highlighting the variety of work and practitioners in the field, *DHNow* aims to help colleagues find each other and share resources.

Who: The audience for *DHNow* includes researchers, practitioners, and students working at the intersection of humanities and technology in educational and cultural heritage spaces. Often these folks are interested in the work of each other (even if they don’t know it yet). Other venues

exist specifically to support community engagement with [questions and assistance](#), [pedagogy](#), or [resources](#), but *DHNow* is meant to be a weekly newsletter that curates work in one place, rather than a discussion forum.

Where: Twitter, blogs, and personal networks are the main forms of communication for our digital humanities audience. The [web feeds followed by *DHNow*](#) are [open for self-inclusion through a web form](#), but since 2011 the subscriptions have been vetted and managed by *DHNow* staff.

When: An integral part of the PressForward Project since 2011, in its current iteration it is supported by the [Alfred P. Sloan Foundation](#). *DHNow* is committed to the time necessary to prototype this publication for the duration of the PressForward grant, through October 2014. This three-year grant period allows for experimenting with sources, processes, and methods in order to produce recommendations and guides such as this one.

How: *DHNow* is an experimental publication that is a testing venue and prototype for aggregation and curation of scholarly work from the open web. The internal [staff](#) of faculty and graduate research assistants (GRAs) are responsible for the sourcing, curation, and publication of the materials. The broad digital humanities community nominates content for inclusion by [volunteering as editors-at-large](#), and by supplying the source base — as well as the work itself — that is disseminated on the front page.

In May 2014, approximately 5 volunteer editors-at-large volunteer for 5 hours/person for 25 total volunteer hours each week, but it often is closer to 15 hours total. A rotating staff of GRAs spend approximately 8 hours selecting and publishing content, as well as administrative responsibilities. Research faculty staff provide approximately 2 hours/week of oversight and sometimes as much as 6 hours a week doing weekly duties.

Technical Setup

Source Base

The initial source base for *DHNow* began with a self-identified [registry](#) of people working in digital humanities, who provided their name, Twitter handle, and web feed into a open Google document started by Dan Cohen in 2009. This list grew through personal additions until the dedication of staff time to expand the number of RSS feeds in Fall 2011. This registry has always been open for self-inclusion through a web form, but since 2011 the web feeds followed by *DHNow* have been vetted and managed by staff GRAs.

The list of [all the feeds followed by *DHNow*](#) is published via Google Docs and [linked from the *DHNow* website](#):

Any feed can be [suggested for inclusion through a web form](#). In addition, ad hoc nominations of



a particular piece, rather than a feed, can be added by any volunteer editor-at-large using the *Nominate This!* bookmarklet.

Web Presence

The same <digitalhumanitiesnow.org> web presence has been maintained since 2009, and amplified through [Twitter](#). The site was offline and we used a workspace during the redevelopment period in Fall 2011. In November 2011 we relaunched the website and added publication on Facebook.

Over the past five years the site has had several looks, determined by the WordPress theme. [Roy Rosenzweig Center for History and New Media](#) staff designer [Kim Nguyen](#) helped to customize the site for the [Fall 2011 relaunch](#), after which Graduate Research Assistant [Sasha Hoffman](#) customized a [new theme](#) to improve the publication process and visibility of various types of content.

In its current iteration, the site priorities are to feature [Editors' Choice](#) pieces with an image and long snippets of text, and to simply list [news items](#). The site does not allow commenting because our goal is to send readers back to original content.

Prior to the development of the PressForward plugin a [combination of Google products](#) (Reader and Google+) were used to aggregate and discuss potential content. Since 2013 the site utilizes the [PressForward plugin](#) for the aggregation, nomination, discussion, curation, and publication workflow.

Establishment of Editorial Criteria

For the [Fall 2011 relaunch of DHNow](#), the four-member editorial group reviewed all incoming content for eight weeks, during which we had regular in-person discussions about the criteria for selection. We determined the categories and formats to use for the disseminated content and how to present each item with a title, snippet, and link back to the original. During this period we also practiced the nomination, review, discussion, and publication workflow to populate the site before public release.

Responsibilities and Workflow

During the initial trial period of Fall 2011 and Spring 2012, *DHNow* published materials five days a week. After several months of jointly deciding the content distributed by *DHNow*, we began to rotate among the editorial group the responsibility for a particular day or week.

After this initial period, we reduced publication to twice weekly in Summer 2012. This decision

reflected the curatorial goals of the publication and accommodated the real constraints of editor availability. At this point the editors began to rotate weeks and work mostly independently.

After eight months of internal editorial work we were ready to open the process to additional volunteers, who began to sign up for weekly rotations reviewing and nominating content from the pool of all content. We continue to rely on volunteers to provide the first round of review and filtering, while internal editors who have regular commitments to *DHNow* and the PressForward project make the final selections and prepare content for dissemination.

Community Involvement

DHNow makes its selection process visible at several stages: the source base is viewable as a [spreadsheet](#) or via [RSS feed](#); the public can [add themselves to the source base](#); and the nomination process is [open to volunteers](#).

You can read detailed explanations of previous iterations of our process here:

- [Introducing *Digital Humanities Now* – November 2009](#)
- [Digital Humanities Now 2.0: Bigger and Better, with a New Review Process – November 2011](#)
- [Six Month Review of *DHNow* 2.0 – May 2012](#)
- [Sixteen Month Review of *DHNow* 2.0 – February 2013](#)
- [Four Year Review of *DHNow* – November 2013](#)

Additional Resources

- [Overview of *Digital Humanities Now* as a Prototype for Curated Publications](#)
 - [“Discovering Scholarship on the Open Web: Communities and Methods” White Paper \(April 2013\) < <http://pressforward.org/discovering-scholarship-on-the-open-web-communities-and-methods/>>](#)

Appendix: Checklist for Creating a Curated Publication

Previous parts of this Guide introduced considerations for establishing intellectual goals, a source base and venue for publication, a workflow, and an approach to sustainability when curating scholarship from the open web. This Appendix provides a checklist of steps and questions for reference.

Editorial requirements

- defined intellectual goals
- committed collaborators (to expand curatorial interests, labor, reach)
- set period to experiment and develop editorial guidelines and workflow
- shared criteria and strategies for selection
- detailed workflow and logistics
- approach to financial and labor sustainability

Technical requirements

- web sources (RSS feeds from blogs, repositories, or journals, Twitter accounts, etc.)
- website running WordPress, with any desired social media integrated
- established editorial guidelines, assigned responsibilities, and processes

Step 1: Identify Intellectual Goals

The first step is to consider your intellectual goals for a curated publication by asking the traditional journalist's questions in a particular order: what, why, who, where, how, and when?

- **What** is the scope of content you want to distribute?
 - focused on a topic or methodology? represent a subfield, discipline, or interdisciplinary concern?
 - any particular genre?
 - formally published articles or informally published works such as reports, white papers, conference presentations?
 - news items?
 - any unique content or editorial commentary?
- **Why** distribute this content? What is your intention?
 - highlight variety of work in the field?
 - collect valuable work in one place?
 - aggregate attention on overlooked material?

- gather contributions related to a particular event (conference, panel, etc.)?
- share announcements and goings on?
- other?
- **Who** is your desired audience?
 - has an existing community expressed the need or desire for a new venue?
 - is there a dispersed community that doesn't recognize its shared interests yet?
 - do any similar outlets already exist for this audience?
 - have there been attempts and why have they not continued?
 - what differentiates your publication from others?
 - do you know how to reach this audience?
- **Where** is the content you want to distribute?
 - do you have RSS feeds for the websites, journals, or repositories you want to include?
 - can you draw on collaborators or the community at large to assemble or expand the source base?
- **How** will you run this publication?
 - do you have committed collaborators or employees?
 - can you draw on a community effort?
 - where will your website be hosted?
 - do you have any financial or technical support for a trial period?
- **When** will you do this?
 - how many hours do you realistically have to give this publication?
 - for what initial period of time will you commit to this project?

*After you have thought about these questions then you get to focus on preparing the **source base** and **publication venue**, establishing editorial criteria, and determining workflow.*

Step 2: Build Sources and Web Publication

- Create your source base of [RSS feeds](#) in editable spreadsheet
- Choose a name for your publication
- Arrange for a website running [WordPress](#)
 - [pay for hosting](#) and [buy a web domain](#) or obtain institutional hosting?
- Install the [PressForward plugin](#) and subscribe to feeds
- Create social media accounts you wish to use for distribution (e.g. [Twitter](#), [Facebook](#), [Pinterest](#), [LinkedIn](#))
- Choose the look of the website using a [theme](#) (off-the-shelf or customized) to best reflect the intentions of the publication



- Make sure to practice selecting and publishing content in a private webspace

If you are new to WordPress, there are [free resources online](#) and many universities offer training courses.

Step 3: Establish Editorial Criteria

- Choose a period (for example, 6 weeks) to have all editors review all incoming content in PressForward Plugin
- Have all editors nominate items for consideration
- Have all editors add any additional content via *Nominate This!* bookmarklet
- Have discussion among editors about which materials to select for distribution
- Determine the selection criteria for all types or categories of content you wish to circulate
- Determine the amount of content to republish on your site:
 - title, snippet, and link?
 - title and link?
 - any additional commentary or editor’s note as well?
- Establish your mission statement and populate “About Page” on your website

You may want to wait until you have an established workflow and confirmed commitment before publicly announcing your website and forthcoming publication.

Step 4: Determine Responsibilities and Workflow

- How frequently will you publish content on your site?
- Who will make the final editorial selections: e.g., on a rotating basis or as a group?
- How frequently do you expect participation in the review and nomination process?
- Will you open any part of the process to community volunteers?
 - on what timeline?
 - who will oversee volunteers?
- What are the expectations and process for editors to communicate?
- Who will handle the soliciting and vetting of original content?
- Who will organize editorial statements?
- Who will handle public-facing social media accounts?

Practice publishing content in a private webspace to confirm process and populate site before for the public launch.

Step 5: Outline Community Involvement in Project

- Will you reveal your source base or all your incoming content?



- Will you allow community participation in the nomination or selection process as volunteer editors?
- Will you allow open commenting or public feedback on your website?
- Does your source base and editorial board reflect your intellectual goals?

Make sure to revisit your publication's "About Page" and adjust the text as needed to reflect and articulate your goals.

Step 6: Prepare for Launch

- Have defined and agreed-upon roles, responsibilities, and timelines for publication for a specific period of time
- Establish the point in the future at which you will discuss long-term strategies
- Enable your own RSS feed out of your own publication
- Ask trusted colleagues to review the sources, preliminary selections, and editorial workflow
- Determine plan for public announcement and launch
 - have material ready
 - know outlets
 - have person in charge of rollout and responding

Once you have a plan and know the timing of your publication launch you can begin to alert members of your targeted community.

Step 7: Consider Sustainability and Viability

- Continue to review and refine editorial practices as content and editor availability ebbs and flows
- Evaluate community response to the publication
- Assess long-term prospects for editor and volunteer involvement
- Consider sources for long-term technical or financial sustainability

After launch you should continually reassess the scope, processes, reach, and objectives of your curated publication as your community and intellectual goals change over time.