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### **Digitizing *Studies in the Age of Chaucer***

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# Digitizing *Studies in the Age of Chaucer*

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## Abstract

Ruth Evans, Executive Director of the New Chaucer Society from 2012 to 2018, describes the challenges and successes during the long process of digitizing *Studies in the Age of Chaucer*. Using *Studies in the Age of Chaucer* as a case study, this article considers more widely the future of print publications of journals and analyzes the overall impact of digitization on scholarly societies.

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The digitizing of the complete run of the New Chaucer Society's annual journal *Studies in the Age of Chaucer* (SAC) took nearly fifteen years. In July 2012, when I took over from David Lawton as Executive Director (ED) of the New Chaucer Society (NCS) after the NCS Portland Congress, SAC appeared in both print and digital format, but the online version was only partial. Volumes 30 (2008) to the then-current volume were online with Project MUSE, a non-profit, online database of peer-reviewed academic journals and electronic books that – according to its website – was founded in 1993 and which is “produced” (their publisher’s term) by Johns Hopkins University Press (JHUP). The revenue that Project MUSE receives when readers download articles from academic journals is paid to the journal owner (in this case, NCS) as royalties.

It was MUSE’s call, not NCS’s, to only digitize the volumes from 2000 onwards. MUSE did not offer to go back beyond 2000 when the agreement with NCS was made in 2007, but it promised that it would do so in the near future. In June 2009, David Matthews, the editor of SAC from 2008 to 2012, reported to then-President Richard Firth Green and to ED David Lawton that MUSE had announced plans to add back issues of SAC to MUSE. Each back volume would cost NCS \$100 (as they then estimated) to be put online. It was decided at the Trustees’ meetings in 2006 and 2008 (and also reported in 2010) that the Society would meet these costs as MUSE worked back to get those issues online, with MUSE deducting that cost from their royalty payments to NCS.

It was David Lawton that in 2007 drew up the agreement to have the journal appear in digital format with Project MUSE when he was ED of NCS, and it was under his aegis that volumes 30 onwards started to appear online. But the planning for the journal’s online presence had been laid by Frank Grady and David Matthews, two previous editors of SAC. I say more about their contributions below. As a result of the 2007 agreement with MUSE, SAC’s digital future was secure, at least until the date of the renewal of the agreement. It had always been the Society’s intention to digitize the complete run of the journal. My task was to complete that process.

Important groundwork for that completion had already been done when I took over in 2012. Under Matthews’s editorship, volumes 23-29 of SAC (2001-2007) had been scanned by MUSE and were available in useable PDFs for digitization, thereby fulfilling the plan originally put in place by Grady. They were projected to appear online in either 2015 or 2016, in accordance with MUSE’s schedule. The delay was to avoid diluting royalties for all MUSE journals. Once volumes 23-29 had appeared online, the Society’s intention was that the remaining volumes of SAC (1-22, up to 2000), and the two volumes of Proceedings (from 1984 and 1986), would then appear on MUSE.<sup>1</sup> One major

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<sup>1</sup> The two *Proceedings* volumes, produced under the aegis of then SAC editor Thomas J. Heffernan, are anomalous. Published as additions to the regular journal volumes for 1984 and 1986, they are: *Studies in the Age of Chaucer, Proceedings, No. 1, 1984: Reconstructing Chaucer*, edited by Paul Strohm and Thomas J. Heffernan, U of Tennessee, Knoxville: 1984, and *Studies in the Age of Chaucer, Proceedings, No. 2, 1986: Fifth International Congress 20-23 March 1986, Philadelphia, Pennsylvania*, edited by John V. Fleming and Thomas J. Heffernan, U of Tennessee, Knoxville: 1987. These volumes contain papers delivered at the Biennial Chaucer Congresses for 1984 (held in York) and 1986 (held in Philadelphia) respectively. They are not regular – or even supplementary – volumes of the journal, but rather represent a new but temporary venture: to publish papers from the Congresses in journal form. In the absence of any extant records – such as minutes from the Trustees meetings or Thomas Heffernan’s biennial SAC Editor’s reports – that would help to determine either the rationale for what must have been projected as the biennial publication of Congress proceedings in tandem with issues of

reason for doing that was that editors of *SAC* had several times noted to the Trustees that NCS was losing out financially to other journals, such as *The Chaucer Review*, which had its complete run online.

The Publisher's Licensing Agreement that Lawton, on behalf of the New Chaucer Society, signed on January 17, 2007 with Johns Hopkins University Press, the marketers, sellers, distributors, and supporters of the Project MUSE Database, brings in a substantial annual income for NCS, just as it does for JHUP. In 2011, the year before I took over, the royalty payment from MUSE was \$16,308.51. In 2012 that figure had jumped to \$22,506.82. In 2017, the year before I ended my term as Executive Director (and before the 2018 royalties had been calculated and sent out), the payment to NCS was \$29,501.10. In 2020, the *SAC* editorial team (Sebastian Sobeki and Michelle Karnes) noted that the Society's revenue from Project MUSE for 2020 would likely rise by 7-8%, according to their forecast, and that our ranking among MUSE journals had also gone up. On June 10, 2014, MUSE made an amendment to the Licensing Agreement to change their royalty calculations. The agreement was non-exclusive, which meant that NCS could, if we wanted, put the journal on other electronic databases. Although NCS had been approached several times by EBSCO, JSTOR, and ProQuest from 2007 onwards, the Trustees declined to go with an additional platform because they were uncertain about whether this would bring in extra income. EBSCO, for example, conceded that their royalty model would not give NCS as much income as JSTOR's.

A minor obstacle to the completion of *SAC*'s digitization was that NCS did not own a complete run of print copies of the journal. So my first step, in 2014, was to buy, on behalf of the Society, volumes 1-22 and the two volumes of Proceedings from Abe Books, which offered the best prices for back issues of *SAC*. In 2016, volumes 23-29 appeared online, as scheduled. In February 2017 I sent the hard copies of volumes 1-22 and the Proceedings to Johns Hopkins University Press to be scanned. MUSE told me they would appear online in Jan 2018. Their fee for scanning was \$100 per issue, as they had previously estimated, so the cost to NCS would be \$100 x 22 (\$2,200) for those volumes. But by a happy coincidence, NCS did not have to pay anything. Wendy McMillen, of the University of Notre Dame Press (UNDP), the publishers of the print copies of *SAC*, emailed me in late February 2017 to ask if NCS would like to make all the back issues of *SAC* available via Print on Demand and a digital version (webPDF). For that, UNDP would scan all the back copies of the journal for free. I agreed. This saved the Society \$2,200.

I then asked MUSE to send volumes 1-22 and the Proceedings to Wendy McMillen at UNDP. She scanned them in May 2017 and sent the PDFs back to MUSE to be digitized. In turn, UNDP then made all individual back issues of *SAC* available for members to buy for \$60. NCS had fortunately bought enough ISBNs before I became ED to make that possible. UNDP agreed to supply back copies of the journal and distribute them to members on behalf of NCS. Although they would deduct

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the journal or if the intention was to continue to publish them, I draw on the brief introductions to these volumes by guest editors Paul Strohm and John Fleming respectively. Strohm observes that the first volume of Proceedings was produced by an editorial committee consisting of himself, Thomas Heffernan, Derek Pearsall, and Florence Ridley (1984, viii), and that the papers represent the "truly international character" of the Congress (1984, vii). Fleming, however, notes not only the "unpleasant constraints" (vii) that required him to both select and exclude papers from the 1986 Congress but also asserts that the papers indicate the "intellectual climate of the congress" (vii): what he describes as "the happy memorial of a happy event" (viii). Both volumes contain their respective congress's Bicentennial Lecture and Presidential Address, both of which are now published every other year in the annual *SAC* volumes. For whatever reasons, the publication of Congress proceedings did not continue past 1986.

warehousing, print, and other fees, the profit would go to NCS. Wendy McMillen then returned to me, unbound, the print copies of the journal that I had sent her for scanning. The launch of the remaining volumes of *SAC* on Project MUSE – which completed the digitization of the entire run of the journal – took place in late January 2018.

Although I oversaw the final steps of the process, *SAC*'s digitization owes a great deal to the pioneering work of Grady, the editor of *SAC* from 2002 to 2007, and the efforts of Matthews, the editor from 2008 to 2012. Grady's assistant Matt McGraw made the first inquiries to Project MUSE in July 2006. MUSE approached Lawton and Grady with a proposal, and they may have chosen MUSE rather than another database because at that time MUSE was the only platform publishing current volumes, as opposed to archived issues, and because they did not work moving-window style (i.e., they did not embargo the current issue for 12 months). An unintended but welcome consequence of the journal's electronic existence is that compositing costs fell by 30%. When Grady switched to electronic copyediting in 2004, Coghill, the *SAC* compositors, were able to work from the digital copies rather than having to typeset the corrected manuscript pages. That, and Grady's switch to a different paper stock at UNDP, saved *SAC* significant expenses. Matthews continued to shepherd the process of digitization through by arranging for the scanning of the remaining back issues of *SAC*.

It hardly needs to be said that an academic journal's digital presence is important for many reasons. Electronic access to academic journals is now the norm, at least in the US, the UK, and Australia, although only for those academics, writers, and students that belong to libraries that can afford the subscriptions to databases such as Project MUSE and JSTOR. Like many other academic journals in the humanities, *Studies in the Age of Chaucer* is available in both print and online format. Members of the New Chaucer Society receive a hard copy of the journal as part of their annual subscription. The cost of printing physical copies of *SAC* runs to approximately \$10,000 per year. Taking all costs into consideration (which includes administration and postage), the total can run closer to \$17,000. Given these costs, and the administrative effort involved in sending out hard copies (which are mailed from UNDP), together with the delivery and distributional hold-ups that are inherent in the international postal system, the journal's past editors and the Trustees, together with *SAC*'s editors, have several times proposed that the journal be moved to a digital-only format, with proposals for widening access by providing links so that all paid-up members can have digital access. Some Trustees, however, have continued to advocate for the continued provision of print copies of the journal. As *SAC*'s current editors, Sebastian Sobocki and Michelle Karnes, have acknowledged, although many academic journals are moving closer to online-only publications, this process is uneven and in flux.

The history of *SAC*'s appearance online with Project MUSE is of interest to members of the Society not only because it illustrates the dramatic impact of digitization on revenue generation for scholarly societies and on facilitating access to the journal for a wider group of users but also because it changed the nature of the journal's appearance. It became more professional. As Matthews noted in his report to the Trustees in 2012, when he asked them to approve payments to external copyeditors, proofreaders and indexers – payments that would, incidentally, be offset by earnings from MUSE: “Our readership used to be primarily the members of the Society; it is now anybody who wants to download an article on the age of Chaucer.” In other words, the impetus to improve the copyediting

standards of the journal was a result of its electronic presence. The Trustees agreed to Matthews' request.

**The author would like to thank Frank Grady, David Lawton, and David Matthews for their help in gathering information for this essay.**