Contents

An Ethical Indexing Practice

Summary of keynote speech presented by Sylvia Coates at the 2015 ISC/SCI conference, The Business of Indexing: Doing It Right.

Sylvia Coates, developer of the award-winning University of California Berkeley Extension indexing course, believes that in order to run an ethical indexing practice, you need to live an ethical life—by the time you get to ethical dilemmas, they will take care of themselves. For Sylvia, there are four aspects to ethical living: (1) manage your fears, (2) be teachable, (3) be a problem solver, and (4) be generous.

Manage Your Fears

By the time she was 24, Sylvia was mother to four children under the age of three and a half. She had never had a paying job, but her involvement in her children's soccer teams, managing more than 70 games a weekend, helped develop her organizational skills and taught her to get along with a wide variety of people. As her children approached college age, she wanted to train for a career, preferably one that she could do from home. She became aware of indexing and discovered that a conference was taking place in San Francisco. She arrived during the afternoon session of the last day, and by chance she met Bev Anne Ross, designer of the USDA indexing course, and Nancy Mulvany. The next week she took a three-day seminar on indexing, then enrolled in the USDA course.

Chance again played a role in getting her career started. Sylvia's first job came about because her husband wanted to buy a motorcycle that was owned by a priest who was also a publisher. Her husband happened to mention that she was an indexer, and three weeks later, Sister Lemon called and asked her to write an index. Sylvia turned to Carolyn McGovern, an experienced indexer, who told her the questions she needed to ask.

"Fear can be a positive force."

Though her first job paid only $1.60 per page, it led to a second job and a third, until she had indexed 40 books in her first year. But Sylvia was suffering from "imposter syndrome," thinking of herself as a housewife, not an indexer, and

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Submit unsolicited articles electronically in Word or rich text format (*.rtf). Artwork should be in PDF format, and photographs in TIF or JPG format. Send submissions to Editor, Andrea Hatley, andrea@wordtapestries.com with *"Bulletin"* in subject line.

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Bulletin **Board:** Gillian Watts, François Trahan, Sylvia Siemens, Andrea Hatley.

Editor, comments from . . .

I am thrilled to assume the role of editor of the *Bulletin* and to have the opportunity to follow in the footsteps of Moira Calder. The guidance of the *Bulletin* board team—with copyediting by Gillian Watts, French content by François Trahan, and the proofreading of (freshly volunteered) Sylvia Siemens—will ensure that the *Bulletin* receives the care and attention that make it a publication ISC/SCI continues to be proud of.

"The Business of Indexing: Doing It Right" was my first indexing conference. I met so many people and it was wonderful not only to put faces to names but also to get a feel for the person behind the name. One of the many personal highlights was meeting Maureen MacGlashan, editor of *The Indexer,* and, outside the hotel on a warm Victoria evening, listening in while she and Ruth Pincoe discussed the changing world of indexing.

The conference had an exemplary line-up of presenters, including keynote speaker Sylvia Coates, and plenary sessions meant no difficult choices. And, as you will read in the following articles, the sessions were lively, interesting, and informative. Scattered throughout the conference session summaries are comments taken from the survey of conference participants (watch for the magpie icon).

It is not often that a book gets reviewed twice in the *Bulletin*, but Boyd Holmes has provided a take on Nan Badgett's *The Accidental Indexer* that deemed it worth a second look.

Short self-introductions by new board members have also been included; a name gives us so little, while a photo and something interesting about who we are and what we like gives us a bit more depth. However, there is nothing like attending a conference and actually meeting people face-to-face to feel part of a community. Something that really stood out for me was that we are all so much more than indexers—for example many of us are avid knitters and gardeners, and several of us have home-schooled our children (almost three times the national average)—and that got a few of us wondering what else we share. Fodder for another issue, perhaps.

I welcome submissions or ideas for articles for future editions of the *Bulletin*. So if you have read something interesting, disagree with something, have ideas for articles, or have thoughts you would like to share, feel free to contact me at andrea@wordtapestries.com.

— Andrea Hatley

Upcoming Events, Meetings, and Webinars

Remember, ASI webinars, online learning sessions, and conferences are available to ISC/SCI members at ASI member rates. Visit the member benefit area at http://indexers.ca/members-area/ for details.

Note: ASI is currently working to reschedule Do Mi Stauber's webinar on MACREX—most likely sometime in the late fall. Watch for updates at http://www.asindexing.org/category/webinars/.

September 2015

The **U.K. Society of Indexers (SI)** and Society for Editors and Proofreaders (SfEP) joint conference from **September 5 to 7** at Derwent College, University of York. Visit http://www.indexers.org.uk/index.php?id=664 for details.

ISC/SCI Prairies and Northern Canada informal chat on Saturday, **September 12** at 3 pm at the Second Cup,

8902-149th Street, Edmonton. Contact JoAnne Burek for more information.

ISC/SCI Central Canada is meeting in Toronto on Saturday, **September 19,** 2 pm to 4 pm, in Meeting Room #6 (ground floor), CSI Annex, 720 Bathurst Street. Contact Siusan Moffat for more information.

ASI New England & Western New York Chapter fall meeting on **September 26**, 10 am to 2 pm, at The Black Center, 48 Lebanon St., Hanover, NH. Visit http://goo.gl/forms/Aeb5XakzYL to register or contact michelle@linebylineindexing.com for more information.

ASI Rocky Mountain Chapter fall workshop—Margie Towery, featured presenter—**September 26,** 9:30 am to 5:30 pm, at the Quality Inn Denver Boulder Turnpike, Louisville, CO. Contact Teri Lefever at teri@nimbleindex.com for information.

Co-presidents' Messages :: Message des co-présidentes

Mary Newberry

Co-president (in Transition to past president) :: Co-présidente, en voie de devenir présidente sortante

Toronto 2009 to Victoria 2015, with a number of stops along the way, including Halifax—that's the trajectory of my term as co-president, pretty much across the country. Always I shared the chair, and I feel as though everything I accomplished was done by all of us. See what I mean, with this list of a few highlights:

Magpie pins

Arising as an idea from the June 2009 conference keynote address by Katherine Barber, editor of the *Canadian Oxford Dictionary* (possibly the last Canadian dictionary ever), we now have the most sought-after pin in the world of indexing. Thank you, Heather Ebbs.

Financial responsibility and viability

We have money in the bank. Our membership rates are reasonable. We get enormous value for our money. We spend wisely and transparently. Thank you, Gillian Watts.

The Indexer, Canadian editorship, December 2011

Our industry's international voice, and we contributed one fine issue. Thank you, Heather Ebbs.

Bulletin

Consistent, informative, vital, interesting, and varied. Thank you, Moira Calder.

Conferences

Affordable, well attended, countrywide, informative, and friendly. Thank you, Vivien Cartmell, Christine Jacobs, Linda Lefler, Margaret de Boer, and François Trahan.

ISC/SCI magpie pin

Broches « pie » SCI/ISC

De Toronto en 2009 à Victoria en 2015, avec un certain nombre d'étapes au long du chemin, y compris Halifax, mon parcours pendant mon mandat de co-présidente m'a fait découvrir une grande partie du pays. J'ai rempli mon mandat en partageant les tâches avec ma co-présidente, et j'ai l'impression que nous avons tous contribué au travail accompli. Pour mieux vous faire comprendre ce que je veux dire, voyez la liste suivante de nos plus grandes réalisations.

Broches « pie »

Elles ont été créées à partir d'une idée extraite du discours d'ouverture du congrès de juin 2009 donné par Katherine Barber, éditrice du *Canadian Oxford Dictionary* (probablement le dernier dictionnaire canadien qui sera jamais créé); nous avons maintenant les broches les plus recherchées du monde de l'indexation. Merci, Heather Ebbs.

Responsabilité et viabilité financières

Nous avons de l'argent dans notre compte en banque. Nos tarifs d'inscription sont raisonnables. Nous dépensons notre argent de manière productive, raisonnable et avec transparence. Merci, Gillian Watts.

The Indexer, édition canadienne, décembre 2011

La voix internationale de notre industrie; et nous avons participé à la rédaction d'un numéro de qualité. Merci, Heather Ebbs.

Bulletin

Cohérent, instructif, vital, intéressant et varié. Merci, Moira Calder.

Congrès

Coût raisonnable, bonne participation, se tiennent dans l'ensemble du pays, instructifs et atmosphère chaleureuse. Merci, Vivien Cartmell, Christine Jacobs, Linda Lefler, Margaret de Boer et François Trahan.

Indexers.ca

A brand, spanking new website, easy to navigate, great to look at, with online conference registration and a private members' area. (I love Rayola's revision of Rob Fujimoto's "thinking i" logo.) Thank you, François Trahan.

Archives

We've started. We have a valuable history that needs to be preserved. There's more to come on this, and we'll need more of you to step up, even if it's to take over other responsibilities so we can free up the driving force behind this one. Thank you, Jennifer Hedges.

ISC/SCI Ewart-Daveluy Indexing Award

Wow. This one I can't believe. It's here, we have detailed criteria, and we have a winner we can all be proud of. Thank you, Christine Jacobs.

Add a huge long list of other people's names after each person I've singled out to thank. This is a really great organization. Thank you for standing beside me during the past six years. I look forward to standing beside others for the next six!

Indexers.ca

Un tout nouveau site web, de navigation facile, d'une belle esthétique qui permet de s'inscrire aux congrès en ligne et qui offre une zone privée pour nos membres. (J'adore les changements qu'a faits Rayola au logo "thinking" de Rob Fujimoto.) Merci, François Trahan.

Archives

Nous avons commencé. Nous avons une histoire importante qui mérite d'être préservée. Notre travail dans ce domaine ne fait que commencer et nous avons besoin de votre aide, même si c'est pour assumer d'autres responsabilités, ce qui permettrait de libérer les personnes qui jouent un rôle important dans ce projet. Merci, Jennifer Hedges.

Prix d'indexation Ewart-Daveluy de la SCI/ISC

Je n'arrive pas à y croire! Nous avons réussi. Nous avons établi des critères détaillés et avons un lauréat dont nous pouvons tous être fiers. Merci, Christine Jacobs.

Ajoutez aussi après le nom de chaque personne que j'ai mentionnée pour les remercier une longue liste d'autres noms. La SCI/ISC est vraiment une organisation incroyable. Merci de m'avoir soutenue au cours des six dernières années. Je me réjouis de pouvoir, à mon tour, soutenir d'autres personnes pendant les six prochaines années!

Jennifer Hedges

Co-president :: co-présidente

On behalf of myself and the others who have worked as co-presidents with Mary, I would like to thank her for her leadership, patience, and tact. One of Mary's last tasks as co-president was to suggest a division of duties for the two co-presidents. To my surprise, I seem on the way to becoming "senior" co-president. Mary's example of how to play that role will inspire me. I look forward to working with her in her new position as past president and to working with Margaret de Boer as my "junior" co-president.

J'aimerais, en mon nom et au nom de toutes celles qui ont co-présidé notre organisation avec Mary, remercier cette dernière pour la manière dont elle a dirigé la SCI/ISC, pour sa patience et son tact. L'une des dernières idées de Mary dans son rôle de co-présidente était de suggérer une division des tâches entre les deux co-présidents. À ma grande surprise, il semblerait que je sois en voie de devenir la co-présidente principale. La manière dont Mary a rempli ce rôle m'inspirera énormément. Je me réjouis à l'idée de travailler avec elle lorsqu'elle occupera le poste de présidente sortante et avec Margaret de Boer dans son rôle de nouvelle co-présidente.

The Ethics of Indexing

Continued from page 1

that everyone else knew so much and she knew so little. Fear, she says, can be a positive force. Be honest and ask for help when you need it.

Be Teachable

Sylvia began this section of her speech by describing her worst learning experience and her best. The worst came in math class, when she was 12 years old. The students were given an assignment to work on in class. Unsure how to proceed, Sylvia approached her teacher, who told her, "Just do it."

The best experience came years later, when she was in college taking physics 101. Taught by the dean of physics, the course comprised lectures, optional study groups, and essay tests. The tests you could do over, again and again, until you got a mark that satisfied you. If you wanted an A, you worked until you got it. This professor taught her that you can learn anything, given the opportunity. And this philosophy is the basis of the Berkeley course: students don't go forward until they achieve success at each level.

"You can learn anything, given the opportunity"

People approach learning with one of two mindsets: a person with a fixed mindset wants to succeed but fears failing and quits when things become too difficult. A person with a growth mindset wants to be challenged and to figure things out. A growth mindset enables indexers to deal with new, often scary, aspects of the job, such as embedded indexing, e-books, and outsourcing.

Be a Problem Solver

Index projects usually come with problems, especially today, when technology enables more last-minute changes. The indexer must identify the problem—for instance, if the author wants to add entries, you may have to cut something. Then identify the goal, which is not to prove that you are right but to do the job as well as you can under the circumstances and get it off your hands. Assemble the information you need to solve the problem. Expand your knowledge even if you have to pay for it. Get a buy-in to the solution from the publisher, the editors, and the author. "It's their book," Sylvia says. "Give them what they want."

Be Generous

The indexers Sylvia hires to instruct in the Berkeley course are good indexers who want to teach—and are nice people. Students are very vulnerable; they need someone who has the required knowledge and who also understands how to convey it. Just as the generosity of established indexers helped Sylvia at the beginning of her career, she urges us to be generous with our fellow indexers.

Generosity to clients is a given. Sylvia gave the example of providing a list of errors noted in the text while indexing as a great help to authors and publishers. And go the extra mile when needed—a number of her anecdotes described emergency situations where she was able to get an index together at the last moment. In one instance, she reached out on Index-L on a Saturday evening for help in writing an index due the following Tuesday. Ten indexers responded, and together they created an index for a 400-page book. It wasn't pretty, she says, but it was done.

And finally, for our own mental health, we must be generous to ourselves.

— Jennifer Hedges

Note

See also Iva Cheung, "Sylvia Coates: An Ethical Indexing Practice (ISC Conference 2015)," June 10, 2015, http://www.ivacheung.com/2015/06/sylvia-coates-an-ethical-indexing-practice-isc-conference-2015/.

Photo credit: Heather Ebbs

Sylvia Coates fielding questions on ethical indexing practices

CINDEX™ Roundtable: ISC/SCI Conference, Victoria, BC

This pre-conference session, held on May 27, 2015, and arranged at the last minute, exceeded my expectations in terms of turnout and topics covered. For those of you able to attend, thank you for joining me. I think we had a lot of fun and we all learned a great deal—me included!

To get the conversation started I had prepared material on some aspects of the program with which users might not be familiar. And even though the two-hour session was billed as a "discussion," it was accompanied by live demonstrations. It also goes without saying that one thing led naturally to another, and although we did indeed cover the prepared material, so much more was addressed, discussed, and demonstrated. In this report I cover only the prepared material, not the digressions, reformatted into a Q&A format. Regrettably, the digressions must stay in that Victoria conference room.

Q1: My eyes are not as young as they used to be. I know I can change the point size of the index display, but the type in the record entry window is still very small. Can I change that too?

A: Yes, you can. Go to the Preferences/View tab (in Windows, Preferences is under the Edit menu; on a Mac it is under the CINDEX menu) and set "Entry view" to your desired size. Should you change the size of the index display via the toolbar at any time during your work, the type size you have set for the record entry window will not change.

Q2: My client requests that page references for figures and tables be followed by *f* and *t* respectively. Can I simply enter them in roman type and have them automatically italicized?

A: Yes, you may designate "f" and "t" as Styled Strings (under the Document menu). CINDEX will italicize only single instances of *f* and *t*. It will not italicize these letters when used within a word.

Q3: I normally enter the start of main headings in lower case, knowing that I can automatically capitalize them in Document/Headings/Style. Sometimes, however, the beginning character needs to remain in lower case. How can I achieve this?

A: To prevent automatic capitalization, insert the tilde character (~) in front of the lead character in the field. The tilde is not displayed in Full Format view.

Q4: What is the best way to enter and format cross-references?

A: Always enter the cross-references in the page field; just one target term per record. For example:

NOT

> Main>Cats
>
> Page> see Lions; Tigers

BUT

> Main>Cats
>
> Page: see Lions

> Main>Cats
>
> Page>see Tigers

Do not add them to a page field that already contains a page reference. If you follow these guidelines, CINDEX will correctly combine, style, format, and position them according to your settings in Document/Cross-References. This also allows CINDEX do its job properly when you use the Tools/Check References/Verify Cross-References feature.

At first glance the options at Document/Cross-References (a grid-like panel or dialogue box that displays punctuation and formatting options and changes depending on the condition—"From Main Heading or "From Subheading") can look daunting, but play with them and see what happens. Remember that nothing is cast in stone. You can change the settings to your heart's content (or confusion)—the data you have inputted will remain unchanged.

Q5: What would you say is the single most useful new feature in CINDEX version 3?

A: It depends on what kind of subject material you index, but I would have to say that the feature many consider worth the upgrade price alone is the horizontal flip. In a record field that contains a word or phrase followed by text in parentheses, you can exchange the contents of the leading text with the text in parentheses (e.g., an acronym and its accompanying spelled-out form, or vice versa). Other scenarios where this is useful is in the inputting of botanical/zoological terms with

Conference Session Summaries
The Business of Indexing: Doing It Right

The conference was attended by about half of the ISC/SCI membership, and close to 90% of attendees completed the follow-up survey. Though all the conference sessions received favourable reviews, five sessions stood out: Lucie Haskins's "Embedded Indexing"; Heather Ebbs and Thérèse Shere's "Making Time"; Julie McClung and Rosalind Guldner's "Ethical Indexing Practices"; JoAnne Burek's "Business Continuity"; and Sylvia Coates's "The Business of Indexing."

The annual general meeting was part of the conference, and there was some interesting feedback:

Quick, well-run, friendly, and astonishingly non-boring!

We should take the opportunity of AGMs—having the whole membership in one room—to do more than just OK reports and actions.

After reading through the survey, I thought it would be fun to share more of the comments:

I appreciated the low-key, informative ambience of the conference. [It] seemed very well organized. Also, the location—a small/medium size hotel in Victoria, a great city—really enhanced the experience.

It was a wonderful conference—I like the fact that our conferences are all plenary sessions—we experience them as a group and this makes a great difference in the conference atmosphere.

I thought the program of this year's conference was the best over all that I have experienced. A good variety of topics and presentation styles.

[What should ISC/SCI add to its conferences?] More alcohol (just kidding).

Make the lunch break a bit longer—I needed/ wanted a bit more of a break between morning and afternoon sessions to stretch my legs and get outside for a bit.

It was my first ISC/SCI conference and I enjoyed being with all the conference attendees for every session. Very intimate setting. Thank you!

Could have used a facilitator to encourage networking/meeting people instead of just sitting at one's table.

I got several ideas on how to improve my business and indexing practices, and made a few more connections with colleagues.

Since most of the attendees have travelled a significant distance, it would be nice to add a tourist component, some sightseeing or an excursion. It would add a social aspect in addition to the banquet, which can be a bit formal.

[Did this conference meet your expectations?] Yes . . . and surpassed them. The more intimate atmosphere was exceptionally conducive to speaking with more of the attendees than I might have if everyone followed a different "track."

I love the mix of practical and more theoretical or research-type topics. I was inspired by the feeling of our group being a tightly knit community. I didn't feel at all as if I had to "get in" to be accepted into a conversation. I found it easy to approach anyone.

So many thanks to all that helped put on an excellent conference.

I love ISC/SCI conferences!

Thanks for another excellent ISC/SCI conference!

On to the session summaries . . .

Making Time: Working Wisely So You Can Play More

Heather Ebbs and Thérèse Shere

Separating work from non-work and enjoying both can be difficult. Especially for freelancers working from home and setting our own hours, it can be easy to let the two bleed into each other, rendering us far less productive than we may think we are. As I sit to reflect and write about Heather Ebbs and Thérèse Shere's joint presentation, "Making Time: Working Wisely So You Can Play More," I also reflect on my own harried past couple of months, of deadlines banging into each other and having to work on weekends and late into the night. Thérèse and Heather's talk was definitely timely. Now I just need to find time to implement their suggestions . . .

For work, Thérèse and Heather emphasized finding a way to track our time. This included keeping a log of all our activities, productive or not. Thérèse also provided a spreadsheet she uses to track each job, its details, and how long it took. As well, she recommends simply reflecting on how we feel about our work, when we feel most productive and pleased, and when we don't. By mapping out what we actually do, when we do it, and how we feel about it, we can identify trouble spots and find ways to adjust our schedules to better utilize our prime working hours.

Heather and Thérèse also discussed ways to find more joy in our work, because it is when we are happy about our work that we are most productive. Their suggestions included insisting on a fair price for our work (resentment is a sure joy- and job-killer), switching back and forth between projects to avoid boredom and getting in a rut, finding music we can work to, using the Pomodoro Technique* to track our time spent on both work and breaks, having a workspace we enjoy being in, and keeping a journal to track what we need to do.

It can also be helpful to recognize that freelancing can have its own unique frustrations, such as the isolation of working alone, a lack of positive feedback, cabin fever from working at home, unstable flow of work, and having to manage finances, marketing, and other business matters beyond our marketable skills. Recognizing these challenges and finding solutions—using apps, hiring someone, connecting with other freelancers, finding a co-working space—can go a long way towards job satisfaction and productivity.

Heather and Thérèse pointed out that our non-work lives need to be managed too. Deadlines and clients may loom large, but we are still ultimately in control. We also don't want to turn our joys into jobs.

What do we really want to do in our downtime? Do we have other obligations besides work, and are those true obligations or something that can be delegated or lived without? If we work at home, do we simply need to—literally and metaphorically—close the door so that we can work during scheduled hours? What small pleasures can we still enjoy on a daily or weekly basis?

Though it can be hard, especially when trying to build a freelance career, to feel in control of work and life, Thérèse and Heather show that it is possible to at least make an effort. My goal is to implement three of their suggestions. That sounds like an achievable start, and if I can get those three down, then I can try three more.

— Stephen Ullstrom

Notes

* The Pomodoro Technique is a simple time management tool using a timer to break work periods into intervals of 20 to 25 minutes, separated by short breaks. See http://pomodorotechnique.com.

Visit http://indexers.ca/members-area/conference-videos-papers/ to download the conference handouts for this presentation.

See also Iva Cheung, "Heather Ebbs & Thérèse Shere—Making Time: Working Wisely So You Can Play More (ISC Conference 2015)," June 10, 2015, http://www.ivacheung.com/2015/06/heather-ebbs-therese-shere-making-time-working-wisely-so-you-can-play-more-isc-conference-2015/.

Photo credit: Heather Ebbs

Indexers playing wisely at the pre-conference social gathering

Conference Session Summaries

Building Our Houses of Memory—The Ida Halpern Project: Culture, Identity, and the Archival Legacy

Raymond Frogner

Raymond Frogner, an archivist at the Royal British Columbia Museum and Archives, presented his work on the Ida Halpern records, and the challenges presented by them, particularly the sound recordings. Ida Halpern was an ethnomusicologist who conducted research into the arts and culture of BC's coastal aboriginal communities, recording hereditary songs and ceremonies from the late 1940s to the 1970s. She transcribed the music, conducted extensive musical analysis, and disseminated her findings. Her records (both textual and sound recordings) were donated to the Archives in the 1980s. Because of both researcher demand and conservation issues, the recordings are now being digitized.

Frogner stressed the need to move beyond traditional archival arrangement and description when dealing with the records of different cultures, especially where there is a difficult colonial legacy to navigate. As he stated,

> we strive to present records in their original, complex contexts so that others may pursue their own truths. We must nevertheless recognize our standards are those of Western civilization. We catalogue, arrange, and index; we use textual models to organize oral histories . . . To describe another is to potentially limit, co-opt, embed, and even demean. This conceptual dilemma represents the greatest archival challenge the Halpern records pose.

Frogner provided an overview of the digitization project, of the open-source database—ICA-AtoM[1]— that the Archives will be using (which can handle diacritics and other special characters used in indigenous languages), of Ida Halpern's life and work, and of the records at the Archives, which he described as "the most difficult and complex aggregation of records" he has ever dealt with. He also discussed their cultural and legal significance.

Aside from the conservation and access considerations, Frogner sees the "theoretical goal of the project [as] to further refine an interpretive archival method for the description of colonial records of Aboriginal peoples." The text-based "descriptive approach applies poorly to the traditional memory

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[1] ICA-AtoM is web-based archival description software that is based on International Council on Archives ('ICA') standards. 'AtoM' is an acronym for 'Access to Memory'. https://www.ica-atom.org/

practices of non-textual societies." Critical context is most often lost.

In both description and indexing, correct terminology is essential. Frogner gave the example of what anthropologists such as Franz Boas called "Winter Ceremonials" and the Kwakwaka-wakw call the Cedar Bark Dance. He also explained mistakes made by early colonial officials and ethnographers in the case of the people now known as the Kwakwaka-wakw. The name Kwakiutl, which actually applied only to a group that lived at Fort Rupert, was used for a number of other groups that spoke the same language, Kwakwala (formerly called Kwakiutl). As well, there are different English and Kwakwala names for each tribe and different orthography for the English rendering of Kwakwala names. Halpern provided English names for the songs she recorded, but they also have Kwakwala names, which need to be included in the descriptions.

One of the approaches taken by the Archives to deal with the issues of providing and retaining indigenous context and cultural knowledge within the archival framework, as well as the language issue, has been to involve members of the Aboriginal communities in listening to, translating, and commenting on the content and meaning of the songs. This commentary is being added to Halpern's descriptions and used to provide access points meaningful to the communities where the songs originated.

— Frederike Verspoor

Business Continuity and Resiliency for the Freelancer

JoAnne Burek

JoAnne Burek gave a presentation based on her paper "Business Continuity and Resiliency for the Freelancer." Drawing on her 34 years of experience at IBM, she outlined the process that large companies use to prepare for any disaster that could lead to financial loss or irreparable damage, adding her own original research to adapt those methods for a freelance business.

Any business that relies heavily on computer technologies is vulnerable to a variety of threats, such as hardware failure, cyber attack, or even fire or natural disaster. JoAnne detailed the measures we all can take to protect ourselves from preventable loss, in four easy-to-follow steps: business impact analysis; plans, measures,

and arrangements; readiness procedures; and quality assurance.

The first step to take is the business impact analysis, in which you take stock of both critical and non-critical aspects of running your business. How long could you manage without any of them before missing commitments? Consider the financial implications of downtime and the regulations regarding safekeeping of vital records.

Using insight from her own experiences, along with many examples, resources, and specific websites, JoAnne provided plans, measures, and arrangements to organize your important records. Start simply by separating them into permanent and dynamic files, and continue with concrete mitigations. Use an electronic file-backup system, she stressed, along with encryption and anti-malware software, a password manager, and, last but not least, good practices. By doing so you will have all the building blocks to design your own disaster-recovery plan.

> [How did you benefit from attending this conference?] *Re-energized in general; specifically, I've upgraded my business continuity processes.*
>
> *—Survey respondent*

Once you have outlined your plan, testing your readiness procedures will ensure that the plan will actually work in case of an emergency. Test every step, going through the process as deeply as possible. Are you actually able to restore from a backup? How long did it take you? What would it take to replace equipment, and where would you go if your home (i.e., your office) became unavailable?

Finally, quality assurance maintains the validity and effectiveness of your plan over time—test it at least one a year. Upgrades to your hardware, a new service, evolving threats, or changes in your setup require continued adjustments and testing on a scheduled basis.

For more information, you may contact JoAnne through her website, www.jburekindexing.com.

— Isabel Steurer

Notes

Visit http://indexers.ca/members-area/conference-videos-papers/ to download the conference handouts for this presentation.

See also Iva Cheung, "JoAnne Burek—Business Continuity and Disaster Preparedness for Freelancers (ISC Conference 2015)," June 10, 2015, http://www.ivacheung.com/2015/06/joanne-burek-business-continuity-and-disaster-preparedness-for-freelancers-isc-conference-2015/.

Cross-Border Indexing

Stephen Ullstrom, with Mary Newberry

Stephen Ullstrom began his session with a presentation of results from the survey he conducted earlier this year, asking ISC/SCI members about their work for clients outside Canada. Of the 19 people who responded to the survey, 18 said they had worked for international clients, most of them in the United States and Asia, though jobs had also come from the UK, the European Union, Australia, New Zealand, and the West Indies. Only two people said more than half their work came from non-Canadian clients. Most said they did not seek out cross-border jobs, often because they didn't want to deal with the paperwork or the exchange rate, or because they found foreign clients paid less or more slowly than Canadian clients.

From the survey, Stephen moved on to a discussion of tax considerations. He noted that any foreign income must be reported to the Canada Revenue Agency (CRA), in Canadian currency, and that Canadian citizens generally pay tax on it along with their Canadian income. If for some reason you have to pay taxes in the foreign country, you should still report the full amount to the CRA as income, as it may be possible to claim federal and provincial tax credits for taxes paid in other countries. You should check to see if Canada has a tax treaty with the country in which you paid tax. A tax treaty would explain your tax obligations in that country and might provide a way for you to receive a refund—though it could also affect your eligibility for the federal and provincial tax credits.

If you have American clients, your US income is not taxable by the US Internal Revenue Service (IRS) if you live and do the work in Canada. However, if you earn more than US$10,000, you are required to disclose that income to the IRS. US clients may request that Canadian freelancers provide an Individual Taxpayer Identification Number (ITIN). The process of applying for an ITIN can be expensive and time-consuming, and Mary Newberry's advice was to push back if asked for one: tell your client, "Canada has a tax treaty with the United States, and I pay taxes in Canada. I don't need an ITIN." Usually clients will do the research and find that in fact you don't need this number. If you do work for US clients, you may need to fill out form W-8BEN, which tells clients not to withhold tax on their payment to you. Unfortunately, you will likely need an ITIN to complete the W-8BEN

Cross-border Indexing

form, which puts you back in the situation of spending time and money to get an ITIN.

There were no specific tax considerations mentioned for the UK, Australia, or New Zealand, but Stephen noted that the indexing and editing conventions may differ from those used in North America. Alan Walker of Australia and Maureen MacGlashan of the UK commented that publishers are not likely to provide in-house guidelines to freelancers.

India was the only other country with specific tax considerations discussed at the session, in part because some North American and European publishers are outsourcing their editing to Indian companies. Canada does have a tax treaty with India, and freelancers who work for Indian companies do not have to pay taxes in that country. However, 20% of your income will be withheld unless you have applied for and received a Permanent Account Number (PAN) card. With the PAN card in hand, only 10% will be withheld. There are agencies that will handle the paperwork for getting the card, which costs about $50. And it is possible to hire someone after March 31 (Indian year-end) to retrieve the withheld money.

> ***Indexing for foreign clients can be an interesting and lucrative addition to your Canadian income.***

Stephen ended the session by speaking about some general issues to keep in mind when working with foreign clients. You should research the going rate for indexes in their country and decide whether you need to adjust your rate to compete with home-grown indexers. You also want to keep an eye on the exchange rate—if it's in your favour, the rate could turn an okay or even poor price into a great price. For example, doing a job for US dollars at your regular Canadian rate would be more lucrative right now than doing the same job for loonies and toonies. You might even consider dropping your regular rate if you will be paid in US funds, as the exchange rate could make up the difference.

In the survey mentioned earlier, most indexers said they hadn't changed their rates, but some did drop their price to be more competitive or to allow for differences in the exchange rate. Bear in mind, though, that the rate can fluctuate. Only a few years ago, the loonie was at par with the US dollar, and a change in rate could turn a profitable job into a dud. (Keep in mind that the rate

might change between the time you start a project and the time you are paid for it.) Be sure that you are clear about what currency you are to be paid in—Canadian, US, or the client's currency—and factor in any fees you will be paying for bank transfers, PayPal, or other payment services.

There are potential pitfalls to watch out for, but Stephen made the case that indexing for foreign clients can also be an interesting and lucrative addition to your Canadian income.

— Audrey McClellan

Note

Visit http://indexers.ca/members-area/conference-videos-papers/ to download the conference handouts for this presentation.

Watching the Pennies—Finances for Freelancers

Gillian Watts

The last thing on an indexer's mind as a deadline approaches might be: What is the GST/HST rate for my client? What expenses are allowable? You may understand your indexing software but it's equally important to understand your bottom line and what it means to the success of your business. Gillian Watts, a member of ISC/SCI, has been a freelance editor and indexer for 18 years and treasurer of ISC/SCI for many years. She knows a thing or two about finances!

Gillian emphasized the importance of good financial management for the self-employed indexer and outlined sound and practical advice in eight specific areas:

1. Have a financial plan in place. Determine if your plan is realistic. Ask yourself some questions: How much do I need? What are my living and business expenses?

2. Watch the bottom line. Maintain both a balance sheet to show you a clear picture of your assets, liabilities, and equity and an income statement to track your income and expenses and keep you aware of your net income (or loss).

3. Manage your income. Track all estimates and rates that you send clients. Keep an accurate accounts receivable record of all your invoices, and monitor payments. Are you being paid in a timely manner or do you need to query a late payment? Do you need to consider charging interest on overdue accounts? Sometimes bad debts may need to be written off.

4. Use your bank. Set up a business account that will separate your indexing activities from your personal finances. Take advantage of online banking to reconcile monthly bank statements. Consider establishing a line of credit for dry periods.

5. Keep track of expenses. Stay organized and pay the bills on time. Take advantage of automatic payments and online banking. A separate credit card for business expenses is a good idea.

6. Learn basic bookkeeping. Use online tutorials to learn your software, take a course, or check the resources suggested by the Business Development Bank of Canada (http://www.bdc.ca), which provides information on free or low-cost accounting software. Alternatively, hire a bookkeeper or an accountant.

7. Know your taxes. For your Canadian clients, realize that some provinces charge only 5% GST, while other provinces charge HST, at rates varying from 13% to 15%. Check the details at http://www.cra-arc.gc.ca/tx/bsnss/tpcs/gst-tps/rts-eng.html.

8. Take ample time to prepare your income tax return. Ensure that you have money set aside and save all your records for seven years. Claim all your legitimate expenses: home office, transportation, entertainment, professional development, bank fees, etc.

9. Plan for the long term. Consider signing up for disability or critical illness insurance, and liability insurance. Make contributing to retirement savings a priority—before the fun things—even if it's only a small amount per month.

So, watch the pennies and the dollars will take care of themselves. Thank you for showing us the way, Gillian!

— Margaret de Boer

Notes

Visit http://indexers.ca/members-area/conference-videos-papers/ to download the conference handouts for this presentation.

Photo credit: Heather Ebbs

Gillian Watts with some financial tips for freelancers

Conference Session Summaries

Jumping on the Embedded Indexing Bandwagon . . . or Should I?

Lucie Haskins

Lucie Haskins became an indexer in 2000 after a long career in corporate America. Her background in computer science made embedded indexing a natural fit for her.

Lucie's presentation began with an overview of the current state of embedded indexing—it is not a single practice but covers a variety of techniques. Indexers may be working natively (directly) in the book files or may work in other software and then import the resulting index into the book files. Because of the number of possible techniques and software packages (and versions) available, it is very useful for the indexer to track these details with a preferences file or cheat sheet for each client.

The evolution of the e-book has been somewhat chaotic. This state of flux makes it difficult for the indexer to know which practices to adopt and which ones will survive. Many clients know little about the issues and it is important to educate them beyond a few buzzwords. Lucie mentioned the Digital Trends Task Force (DTTF) of the ASI as a leader and a resource in this field.

For the back-of-the-book (BoB) indexer, embedded indexing can seem daunting. Everything from the way files are received to the software used to create the index to the delivery of the index itself is done differently. The indexing process can be clunkier than when using dedicated indexing software, and editing is often quite difficult. It can take 50 to 100% longer to create an embedded index than a BoB index, and the indexer should take this into account when providing a quote.

There are benefits to embedded indexing. The workflow can be more efficient: large books can be sent to the indexer in portions while other people work on different sections; revised editions may be able to use much of the same text and index.

Because the indexer is often working natively in the book files, everything from document version to software version must be controlled. Lucie discussed the various software packages and add-ons that are being used: Word with DexEmbed or WordEmbed, FrameMaker, and InDesign. The indexer also needs to work with editors, version-control systems, FTP clients, and other tools that make the indexing job more efficient in non-dedicated software.

Lucie Haskins poses the question, "Should I, or shouldn't I?"

Jumping on the Embedded Indexing Bandwagon . . . or Should I?
Continued from page 13

The question is, why should anyone learn to embed indexes? Lucie's feeling is that there are three main considerations for adding these skills to your repertoire. First, are your clients asking for these skills? Next, have you received enquiries about embedded indexes from potential clients? And finally, does any of this interest you? In her case, all three factors played a role in the decision.

— Frances Curry

Notes

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See also Iva Cheung, "Lucie Haskins—Jumping on the Embedded Indexing Bandwagon—or Should I? (ISC Conference 2015)," June 10, 2015, http://www.ivacheung.com/2015/06/lucie-haskins-jumping-on-the-embedded-indexing-bandwagon-or-should-i-isc-conference-2015/.

Photo credit: Heather Ebbs

The Business of Indexing—Indexing Efficiency, Speed, and Earnings

Sylvia Coates

Conference participants were treated to a second session by keynote speaker Sylvia Coates, this time focused on increasing the efficiency, speed, and earnings of your indexing practice. She started with general reflections on the nature of the indexing process, highlighting that indexers use different approaches to their work and gradually develop their own styles and habits. These habits often become second nature and can be difficult to change. There are, however, methods and practices that can be adopted by any indexers to increase productivity and improve the quality of their work. Some of these are concerned with the work process, while others deal with business relations.

Successful indexing is heavily dependent on indexing skills and the ability to write an index quickly without loss of quality. An important indexing skill, Sylvia maintains, is reading comprehension. Here, subject familiarity usually plays an important role. Most indexers do a better job when they work in their area of expertise, where they can easily navigate among familiar topics. Looking for topics in the text is part of comprehension process. It involves thoughtful reading, which is different from reading for pleasure. It requires deep concentration and active listening to the author. Asking simple questions—who?, what?, where?, when?, why?, and under what circumstances?—may increase the efficiency of term selection during reading. Clustering main headings by breaking down one topic into several topics improves the readability of index.

In addition to good reading-comprehension skills, indexers must possess the ability to conceptualize thematically. Sylvia elaborated on building thematic relationships among concepts by organizing them around events, or themes. Thematic conceptualization is natural for children, but in most cases that skill disappears in adulthood. Learning to summarize thematically may be challenging for new indexers who are just entering the profession. Non-native speakers of English may have an advantage, since learning a foreign language is built on thematic conceptualization.

Running an indexing business is a reputable occupation for an intellectual mind and can potentially generate a substantial income.

Sylvia also suggested simple techniques designed to increase indexing speed. She advocated the OHIO ("only handle it once") method, which focuses on creating index structure and multiple access points as you go. This approach almost eliminates the editing process, boosts indexing speed, and, as a consequence, increases earnings.

Good business relationships with clients, Sylvia stressed, are built on trust and mutual respect. Readiness to go above and beyond for your client, responsiveness,

and willingness to help are highly valued in the publishing world. Every project counts. One poorly written index may seriously damage your relationship with a publisher.

Summarizing her presentation, Sylvia stated that in recent years, working from home has become not only acceptable but respectable. Running an indexing business is a reputable occupation for an intellectual mind and can potentially generate a substantial income. At the end of the presentation, the audience plunged into a lively discussion about indexing methods and practices.
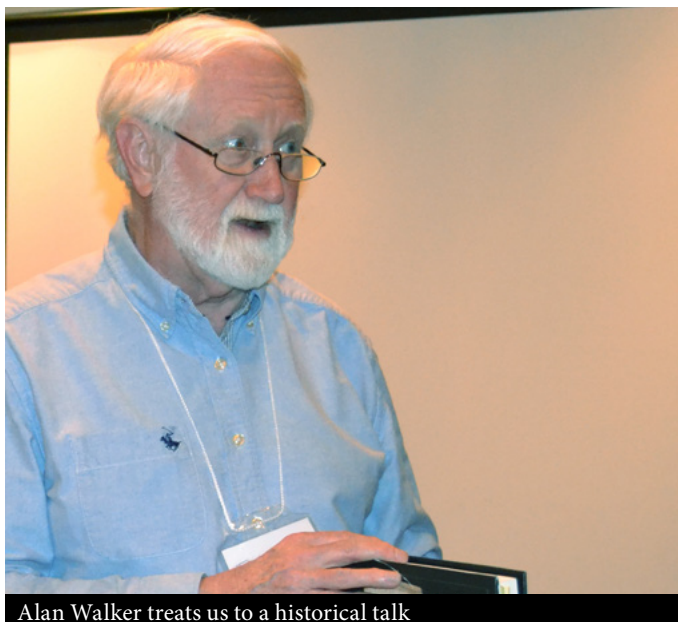
— Sergey Lobachev

Notes

Visit http://indexers.ca/members-area/conference-videos-papers/ to download the conference handouts for this presentation.

See also Iva Cheung, "Sylvia Coates—The Business of Indexing: Indexing Efficiency, Speed, and Earnings," July 10, 2015, http://www.ivacheung.com/2015/06/sylvia-coates-the-business-of-indexing-indexing-efficiency-speed-and-earnings-isc-conference-2015/.

Order and Chaos in Early Modern Indexing, Editing, and Publishing

Alan Walker

Alan Walker treated us to an entertaining and informative overview of the approach that 17th-century virtuosi took in organizing their notebooks and

Alan Walker treats us to a historical talk

creating indexes. The virtuosi, whom we would now call scientists, were interested in intellectual pursuits and experimental and observational science. They recorded their observations and thoughts in notebooks known as "commonplace books." John Foxe, John Locke, Francis Bacon, Robert Boyle, and J.A. Comenius are among the virtuosi whom Walker discussed.

With the consent of the author, Alan provided the audience with handouts taken from *Notebooks, English Virtuosi and Early Modern Science*, by science historian Richard Yeo (University of Chicago Press, 2014). Having indexed one of Yeo's previous books, *Encyclopaedic Visions* (Cambridge University Press, 2001), Alan was already familiar with John Locke's system of indexing his notes.

The commonplace books had heads at the tops of the pages or down the margins, to provide what we would now call keywords or headings. In printed commonplace books, a string of related keywords (akin to related terms) could be printed across the tops of pages that could then be filled in with handwritten notes; these were in turn gathered into indexes with page references. The alphabetical order might not be as rigorous as we would use today, but it was sufficient for the user to find the information. Interestingly, although the heads tended to be in Latin, the notes/entries themselves tended to be in English or French; spellings were inconsistent.

Alan also included some examples of periodical and book indexes of the time. He intends to develop this presentation into a more comprehensive article or series of articles.

— Christine Jacobs

Photo credit: Heather Ebbs

Mindful Marketing

Kendra Millis

Over the past eight years Kendra Millis has grown Millis Indexing Services into a thriving full-time indexing business. She credits her initial marketing blitz for most of her success: landing a few jobs within the first six months, doing all right during the first full year, doubling her projects during the second year, doubling her projects again during the third year, hitting a plateau for short while, and then again doubling projects. And the work keeps coming.

Conference Session Summaries

Mindful Marketing

Marketing your business should not be done haphazardly. The key for Kendra is to be proactive in creating a plan that reflects clearly outlined goals and a professional identity and builds a business reputation. Be mindful of both the explicit (written) and implicit (design) components of your messages.

Kendra outlined two marketing strategies, a hard-copy campaign and an e-campaign—the cost of doing either or both is easily recouped by one 250-page project at US$3 per page. A hard-copy campaign with 500 recipients, including professionally designed letterhead, two business cards, and postage stamps (70% of the total cost), can be had for just under US$350 (C$450). The method is tangible and traditional, but it can take time to get replies; often your information is simply kept on file and it may be years before you hear anything.

An e-campaign using a website (which involves web hosting and site maintenance fees) and relying on email can cost as little as US$255 (C$330), but some of the costs recur annually. It is faster and can have a quicker response time, but not only can your email be easily spammed, ignored, or deleted, it can also get buried in an overwhelmingly full inbox. Keep in mind that the return rate for any campaign is very low—a 2% return is good.

I got all fired up to do more marketing.

—Survey respondent

Take time to craft your introductory letter and your website; get colleagues to review them and provide feedback. What do you want to highlight about your experience or expertise? What might you not want known (perhaps that you completed your course only yesterday)? Make sure not to highlight that. "There is a difference between being honest and divulging absolutely everything," Kendra said, to audience laughter.

Tailor your message to your market. Each segment has its own needs—if a quick turnaround is important, stress that aspect of your skill set. Include a call to action, telling people what you want them to do, for example, "Please feel free to contact me about any upcoming indexing projects." Use a standard business format for your one-page introductory letter, and save it as an updatable template.

Pay close attention to the design and style of your message: use a legible font, add colour (it can seem more professional), and use good-quality paper. Personal elements—a photograph, a motif, or a tagline or quotation—can set you apart, but make sure they are in line with your professional image.

Kendra used a one-week subscription (approx. C$30) to the Literary Marketplace (www.literarymarketplace.com) to source and download an initial set of contacts. She has had similar success with generic and personally addressed letters. Personal touches on a generic letter—your signature, professional letterhead, individual stamps—can make it look as though it is not part of a marketing blitz.

She was provocative!

—Survey respondent

Keep a database (use your indexing software) of contact information, date sent, response received, and any comments. Kendra suggests following up with a postcard campaign three to six months after the initial contact, and periodically thereafter. Postcards can be used to remind contacts that you exist; to highlight changes to your services, experience, or education; if your contact information has changed; or (to chuckles from the audience) that you "still have room in your fall schedule." Postcards purchased in bulk with a fall/winter or spring/summer theme and a generic message can be used any time.

Kendra gets most of her work from repeat clients. Maintaining these relationships is important to her bottom line. Little things—such as hand-signed secular holiday cards (without a business card), calendars, magnets, and thank-you or congratulations cards—show that you appreciate their business.

An updated listing on professional indexer-locator websites is part of an ongoing marketing strategy. It is often the first responder who gets the work from a list posting. Have an up-to-date email response template ready, with a list of qualifications and a link to your website.

With every contact you make—client, potential client, or peer—you are building your reputation. Always have your business cards and an elevator speech (quick, simple, and no more than two minutes) available.

When asked about marketing using social media, Kendra replied that though she maintains a LinkedIn profile, she has been too busy to use it as a marketing tool or to explore other social media options. She has never purchased advertising.

Contact Kendra if you have questions or for more information at www.millisindexing.com.

— Andrea Hatley

Ethical Indexing Practices

Julie McClung and Rosalind Guldner

What kinds of ethical issues do we face as indexers? Julie McClung, senior Hansard indexer at the Legislative Assembly of British Columbia, and Rosalind Guldner, supervisor of indexing and reference for Hansard at the Legislative Assembly of Ontario, delved into ethical indexing practices and gave us a taste of the challenges that arise when indexing political debates, which, as McClung said, "provides a lot of food for ethical thought."

Ethics in indexing

Information ethics as a field looks at the life of information, from storage and retrieval to dissemination. Practices should be fair, equitable, and value neutral, but gatekeepers, including indexers, have the ability to bias or even outright censor information. "If we make indexes without thinking," said McClung, "our indexing choices can magnify, distort, or omit information." Indexers have a responsibility not only to the profession but also to the public interest.

> *It was extremely interesting to get a behind-the-scenes peek into indexing parliamentary materials. I never thought of the issues indexers had to wade through. Eye-opening!*
>
> *—Survey respondent*

Ethics aren't codified for indexers, but some guidelines for indexing practice do exist, including the Society for Indexing's code of conduct and ISC/SCI's awards criteria. As Hansard indexers, McClung and Guldner also follow codes of ethics for government employees: they must be nonpartisan and avoid conflicts of interest, real or perceived.

Indexing the Hansard

Political debates are transcribed verbatim into the Hansard, which is edited for ease of reading and then published late that same night. Transcripts typically run between 20 and 100 pages and are essentially multi-authored serial publications, with each member of the legislature (85 in BC and 107 in Ontario) serving as an author. Every author has a unique idiolect, which makes synonym control challenging, especially because the governing party and the opposition will often use different polarized, emotion-laden words to describe the same topic—for example, backroom deal versus

contract negotiation. The indexers must find a third language—one that's general and nonpartisan—to bridge that polarized content, keeping the public interest and universal access to coverage topmost in their minds. While choosing unbiased headings, they also have to be careful not to inadvertently sanitize the index with euphemisms.

Because the Hansard is a transcript of speech, which is inherently less organized than a well-thought-out piece of written work, McClung and Guldner also face problems such as digressions, ambiguities, mangled metaphors, and deliberate attempts to confuse. "If the text is ambiguous, we preserve the ambiguity in the index entry," said Guldner. "At least then we're not misleading people about the content." The indexers also have to evaluate whether the content in a digression is substantive enough to index and evaluate whether omitting a mention may be interpreted as censorship.

To do their jobs effectively, McClung and Guldner have to keep on top of the topics in the debates. Thorough knowledge of the subject matter helps ensure that the index is comprehensive. During some debates, said Guldner, the project or policy name is never mentioned, so it's up to the indexer to provide that context, not only for the citizens of today but also the historians of tomorrow. Said McClung, "Our job is to index what was said, not make value judgments about it."

For more information about ethical indexing practice, McClung and Guldner recommend Ana and Donald Cleveland's Introduction to Indexing and Abstracting and Heather Ebbs's ASI webinar on ethics in indexing (http://www.asindexing.org/webinars/ethics-ebbs/).

— Iva Cheung

Photo credit: Heather Ebbs

The Hansard indexers (and a tech!): Robin Rohrmoser, Julie McClung, Dan Kerr (technical and publishing specialist), Rosalind Guldner, Shannon Ash, Trine Schioldan

ISC/SCI 2015 Awards :: Prix de la SCI/ISC 2015

François Trahan: Recipient of the Ewart-Daveluy Award

Congratulations to François Trahan of Sooke, BC, the first recipient of the newly created Ewart-Daveluy Award for Excellence in Indexing. François received the award for his indexes to *Ancient Pathways, Ancestral Knowledge* by Nancy J. Turner (Montréal: McGill-Queen's University Press, 2014). The award was presented at the ISC/SCI annual banquet in Victoria, BC, on May 28, 2015.

The chair of the 2015 adjudicating panel, Christine Jacobs, presented the award to François for his indexes to this "monumental work." She said, "As the panel noted, despite serious space restrictions, you were able to manage the painstaking processes of analyzing the very dense text and creating two indexes to do the work justice. Your close cooperation with author and publisher is evident and shows an above-average level of care and extra work. The overall index is respectfully comprehensive and carefully developed."

François produced two indexes for this two-volume, 1,000-page work—the culmination of the author's 45

François Trahan accepting the Ewart-Daveluy Award from committee chair, Christine Jacobs.

François Trahan, lauréat du prix Ewart-Daveluy

Nous tenons à offrir nos sincères félicitations à François Trahan de Sooke, en C.-B., le premier lauréat du nouveau prix d'excellence en indexation Ewart-Daveluy. Ce prix lui a été attribué pour la qualité de son travail d'indexation pour *Ancient Pathways, Ancestral Knowledge* de Nancy J. Turner (Montréal : McGill-Queen's University Press, 2014). Il lui a été présenté lors du banquet annuel de la SCI/ISC, le 28 mai 2015 à Victoria, en C.-B.

Christine Jacobs, la présidente du comité d'arbitrage 2015 a présenté le prix à François pour son travail d'indexation pour cet « ouvrage monumental ». Elle a déclaré : « Comme l'a remarqué le comité, malgré de grandes restrictions en matière d'espace, vous avez été en mesure de gérer les difficiles processus d'analyse d'un texte extrêmement dense et de créer deux index pour rendre justice à cette œuvre. Votre travail montre clairement que vous avez coopéré de près avec l'auteure et l'éditeur et dénote un niveau de qualité et de travail bien supérieurs à la moyenne. L'index, dans son ensemble, est extrêmement fidèle et précis et a été conçu avec grand soin. »

François a créé deux index pour cet ouvrage de 1000 pages en deux volumes, qui représente le point culminant des recherches ethnobotaniques faites par l'auteure pendant 45 ans sur les peuples autochtones du nord-ouest de l'Amérique du Nord. Le premier index répertorie les noms botaniques de plus de 400 plantes qui apparaissent dans le livre; le deuxième index est un index général qui répertorie le nom commun de ces plantes, les lieux, les noms ainsi que les autres sujets.

François suivait déjà auparavant le travail de Nancy Turner et il avait donc une bonne connaissance préalable du sujet, mais il s'est encore mieux préparé en lisant d'autres livres de l'auteure et en consultant les publications et les meilleures pratiques sur le thème de l'indexation. Ce projet d'indexation a posé des défis particuliers à François, dont, entre autres, l'envergure de l'ouvrage, le nombre de noms communs de chaque plante, l'utilisation de langues autochtones dans le texte et, non le moindre des défis, les restrictions en matière d'espace : les index combinés pouvaient, au maximum,

years of ethnobotanical research on the indigenous peoples of northwestern North America. The first was an index of botanical names for the 400-plus plants in the book; the second was a general index of common plant names, places, names, and other topics.

Although François was familiar with some of Turner's work and had a good knowledge of the subject matter, he prepared by reading more of the author's books and reviewing indexing literature and best practices. Special challenges to indexing this work included the scale of the book, the variety of common names for each plant, the use of First Nations language in the text, and, not least, the space restriction: the combined indexes were allowed just 50 pages. The author was generous with her time and François valued her collaboration and support.

François thanked the award panel, the author, and those who write on best practices, including indexers who write articles, books, websites, and other resources to promote indexing standards and guidelines. About the new ISC/SCI award, he noted, "It's great that we have recognition for indexing work and for special projects. It tells of the importance we give to standards and criteria, and I hope that goes beyond the Indexing Society—to publishers, to authors, and to others, to help them understand what we do and how important it is."

When asked whether he has any tips for newer indexers who may hope to one day to submit their own indexes for award consideration, François advised, "Read widely and reread regularly: indexing books (Mulvany, Wellisch, the ASI series, etc.), journals and articles (*The Indexer,* newsletters by societies and chapters), and best practices. The websites of some experienced indexers have great information, too. Study other indexes—great, good and bad—not only prize-winning ones, but also those by established indexers and even by beginners. They're a great source of ideas and things to avoid. Finally, go to conferences; it's amazing what people share."

The panellists for the 2015 Ewart-Daveluy Indexing Award were Christine Jacobs, Ruth Pincoe, and Heather Ebbs.

— Sylvia Siemens

Note

Visit François's award-winning indexes at http://indexers.ca/isc-awards-prix-de-la-sci/.

Photo credit: Heather Ebbs

prendre 50 pages. L'auteure a contribué généreusement de son temps et François a beaucoup apprécié sa collaboration et son soutien.

François a remercié le comité d'attribution du prix, l'auteure et tous ceux qui participent à la rédaction des meilleures pratiques, y compris les indexeurs qui rédigent des articles, des livres, des sites web et d'autres ressources pour aider à promouvoir les normes et lignes directrices en matière d'indexation. Lorsqu'on lui a attribué le nouveau prix de la SCI/ISC, François a déclaré : « C'est excellent que nous ayons une façon de reconnaître le travail d'indexation et d'autres projets particuliers. Cela montre l'importance que nous attachons aux normes et aux critères et j'espère que cela aura un impact au-delà de la Société, à savoir sur les éditeurs, les auteurs et bien d'autres encore, et que cela les aidera à comprendre ce que nous faisons et combien cela est important. »

« *François a beaucoup apprécié la collaboration et le soutien de l'auteure.* »

Lorsqu'on lui a demandé s'il avait des conseils pour les nouveaux indexeurs qui espèrent un jour soumettre leur index dans l'espoir de recevoir ce prix, François a répondu : « Lisez des ouvrages variés et relisez-les régulièrement : des livres sur l'indexation (Mulvany, Wellisch, la série ASI, etc.), des revues et des articles (*The Indexer*, les bulletins d'information de sociétés et de divers chapitres) et les meilleures pratiques. Les sites web de certains indexeurs expérimentés contiennent également des renseignements précieux. Étudiez également d'autres index, les meilleurs, les bons et les moins bons, pas seulement ceux qui ont obtenu des prix, mais aussi ceux qui ont été créés par des indexeurs expérimentés et même par des débutants. Toutes ces sources peuvent vous donner de nombreuses idées et vous montrer ce qu'il faut éviter. Et finalement, allez aux congrès; c'est incroyable ce que l'on peut apprendre des autres. »

Les membres du comité d'attribution du prix Ewart-Daveluy 2015 étaient Christine Jacobs, Ruth Pincoe et Heather Ebbs.

— Sylvia Siemens

Remarque :

Vous pouvez consulter les index pour lequel François a obtenu ce prix en allant à http://indexers.ca/isc-awards-prix-de-la-sci/.

Christine Jacobs: Receipent of the Tamarack Award

Choosing a recipient for the Tamarack award is always a challenge, but not because there is a lack of choice. It's the wide array of worthy candidates that makes this pleasurable task so difficult. When we considered Christine Jacobs, we felt sure she must have received this award in the past, and we don't like to give it twice to the same person. To our astonishment, she had never received it.

We knew, then, that this year it was hers. But as is often our practice, we asked a number of people for their thoughts on our choice. It received a resounding endorsement. In particular we want to quote in length the comments made by Heather Ebbs, and strongly echoed by Ruth Pincoe, Noeline Bridge, and Mary Sue Stephenson. Heather wrote,

In October 2007 I wrote to Christine to ask her about her possible interest in chairing a committee to explore the idea of an indexing award for ISC/SCI. The idea had been kicking around for a long time, but the executive of the day decided it was finally time to start doing something about it. Christine was just back from a five-month sabbatical in Ghana, volunteering in libraries, and although she immediately accepted the challenge of putting together a committee, she warned us that she had to get caught up with life back home in Canada again, first.

Nonetheless, by the following summer Christine had her committee in place (Mary Sue Stephenson,

Christine Jacobs : lauréate du prix Tamarack

Il n'est jamais facile de choisir un lauréat pour le prix Tamarack, mais ce n'est pas par manque de choix. C'est, au contraire, le nombre imposant de candidats dignes de recevoir ce prix qui rend cette tâche plaisante si difficile. Lorsque nous avons envisagé Christine Jacobs, nous étions presque sûres qu'elle avait reçu ce prix dans le passé et nous n'aimons pas attribuer ce prix deux fois au même candidat. Mais, à notre grande surprise, elle n'en avait jamais été récipiendaire.

Nous avons alors compris que c'est elle qui recevrait le prix cette année. Mais, comme il est de coutume, nous avons demandé à un certain nombre de personnes ce qu'elles pensaient de notre choix. L'approbation a été unanime. Nous tenons, en particulier, à répéter les commentaires de Heather Ebbs, qui ont été confirmés par Ruth Pincoe, Noeline Bridge et Mary Sue Stephenson. Heather a écrit :

En octobre 2007, j'ai écrit à Christine pour lui demander si cela l'intéresserait de diriger un comité pour explorer l'idée de créer un prix d'indexation pour la SCI/ISC. Cette idée était « en veilleuse » depuis longtemps, mais les présidents élus ont décidé qu'il était finalement temps de passer à l'action. Christine revenait tout juste d'un congé sabbatique de cinq mois au Ghana (elle y a fait du bénévolat dans les bibliothèques) et, bien qu'elle ait immédiatement accepté la dure tâche d'assembler un comité, elle nous a également averti qu'elle devrait avant tout s'assurer de pouvoir organiser sa vie quotidienne au Canada.

Néanmoins, à l'été suivant, Christine avait établi ce comité (Mary Sue Stephenson, Ruth Pincoe et

Christine Jacobs (right) accepting the Tamarack Award from co-presidents Jennifer Hedges (left) and Mary Newberry (centre).

ISC/SCI 2015 Awards :: Prix de la SCI/ISC 2015

Ruth Pincoe and Noeline Bridge) and they had begun gathering data. Work continued moving forward, gradually and thoroughly, and at each annual meeting for the next couple of years they reported on their progress. During that time, Christine also did a fantastic job as coordinator of our 2010 annual conference, held in Montréal.

By early 2011 the committee had a draft in place describing the award: criteria, judging, name, and so on. After executive review and discussion, Christine's committee fine-tuned the award process over the next year or so and put everything in place to solicit submissions for the first-ever Ewart-Daveluy Award.

Finally, this past winter and spring, Christine served as the coordinator of the first award solicitation and judging process. Really, she made the job for Ruth and me very easy, as she circulated the submissions to us and developed a rigorous rubric to help us analyze them. Christine then wrote gracious letters to all of the submitters, including the winner.

Thus, from inception through to the design of the award certificate itself, Christine provided wise, graceful and steady leadership in bringing about an indexing award for our society.

We can't believe our indexing society finally has an indexing award with excellent criteria and a beautiful certificate. Thank you. Thank you for all your hard work and dedication—such a cliché! But applied to Christine in this situation it is the only appropriate and sincere comment.

Thank you. Thank you for all your hard work and dedication

It was with the greatest of pleasure that we presented the Tamarack Award to Christine as a small token of our appreciation for everything she has put into making the Ewart-Daveluy Award a reality and for all the work she's done for the Indexing Society of Canada :: Société canadienne d'indexation.

— Jennifer Hedges and Mary Newberry

Note

For more information on the Tamarack Award visit http://indexers. ca/isc-awards-prix-de-la-sci/#tamarack

Photo credit: Heather Ebbs

Noeline Bridge) et les membres avaient commencé à rassembler des données. Le travail a progressé de manière régulière et précise et lors des deux réunions annuelles suivantes, elles nous ont fait part de leurs progrès. À la même époque, Christine a également fait un travail fantastique en tant que coordonnatrice de notre congrès annuel de 2010 qui s'est tenu à Montréal.

Au début de l'année 2011, le comité avait rédigé la version préliminaire de la description du prix : les critères, le mode d'adjudication, le nom, et ainsi de suite. Après avoir présenté cette version préliminaire à la direction, le comité de Christine a affiné le processus pendant l'année qui a suivi et a organisé le processus de demande de soumissions pour la première attribution du prix Ewart-Daveluy.

Et finalement, au cours de l'hiver et du printemps derniers, Christine a joué le rôle de coordonnatrice du processus de soumission et d'adjudication de ce prix. Elle nous a vraiment facilité la tâche, à Ruth et à moi, car elle nous a transmis les soumissions et a développé une rubrique rigoureuse pour nous aider à les analyser. Christine a écrit des lettres très courtoises à tous les soumissionnaires, y compris au gagnant.

Et donc, de la toute première étape jusqu'à la conception du certificat d'attribution du prix, Christine a dirigé ce projet avec sagesse, courtoisie, mais aussi constance, ce qui a permis de donner naissance au premier prix d'indexation pour notre société.

Il est difficile de croire que notre société attribue maintenant un prix d'indexation qui comprend d'excellents critères et qui est reconnu par un superbe certificat. Merci. Merci à tous pour votre dur travail et votre dévouement – quel cliché! Mais, dans le cas de Christine, dans cette situation, c'est le seul commentaire approprié et sincère qui convienne.

C'est avec grand plaisir que nous avons attribué le prix Tamarack à Christine, bien que ce ne soit qu'un petit gage de notre reconnaissance pour tous les efforts qu'elle a accomplis pour faire du prix Ewart-Daveluy une réalité et pour tout le travail qu'elle a fait pour la SCI/ISC pendant toutes ces années.

— Jennifer Hedges et Mary Newberry

Certificate of Recognition

A small society such as ours relies heavily on the volunteer efforts of members. Since 2004 we have had the Tamarack Award for outstanding service, but it is always a difficult task to choose just one winner. This year the executive instituted the Certificate of Recognition, to honour volunteers who have made a notable contribution. The 2015 recipients are:

Audrey McLellan

In her previous role as membership secretary, Audrey made an invaluable contribution to setting up the new website.

Gillian Watts

Gillian revamped our accounting system, which should ease the transition for her successor as Treasurer.

Margaret de Boer

While serving as regional representative for Central Canada, Margaret worked with Stephanie Watt, then Eastern Canada representative, to organize members' meetings in Ottawa, and she also inspired meetings in the Maritimes.

Mary Newberry

Mary's contributions are almost too numerous to list. In addition to her work on the executive for many years, she stepped in to help coordinate the Victoria conference when no one was able to take on the role of conference chair.

    For me, the best part—and the most difficult—was keeping Mary from knowing that her fellow executive members had nominated her. This became a greater challenge when she volunteered to print out the certificates and to ask Gus, her partner, to fill in the names in calligraphy. Thank you to Christine Jacobs, who not only designed the colourful certificate but developed a modified version that didn't require Mary's signature as co-president, and to Carol Hamill, who arranged for a friend in a medieval society to fill in Mary's name.
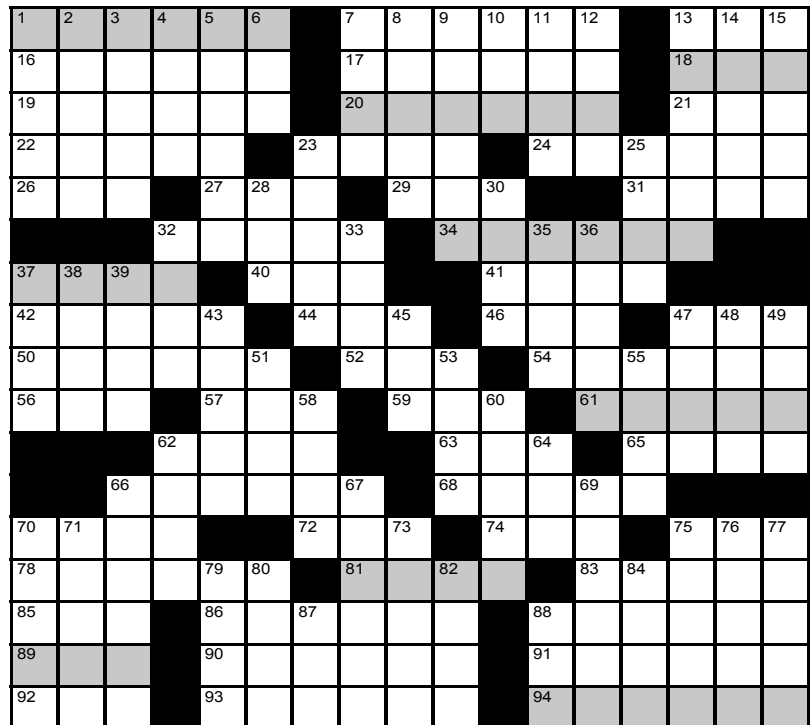
— Jennifer Hedges

Audrey McLellan

Gillian Watts

Margaret de Boer

Mary Newberry

Crossword

Camus Quotation
by Heather Ebbs

Across

1. START OF TIMELY QUOTE
7. Fitting fall title: The Iceman _____
13. Tavern
16. Music player
17. Slow tempo, in music
18. PART TWO OF QUOTE
19. Having more conifers
20. PART THREE OF QUOTE
21. Greek god of wild nature
22. Choose by vote
23. Norse god of thunder
24. Attribute
26. Mesh
27. Epoch
29. Disagreements
31. Singles
32. Diving bird
34. PART FOUR OF QUOTE
37. PART FIVE OF QUOTE
40. Neckwear
41. Gollum's Precious
42. Haloes
44. Sphere
46. Second person
47. Line
50. Reviewer
52. Québec lake
54. Channel
56. Juan's hurrah
57. Nightmarish tree?
59. Ohs' companions
61. PART SIX OF QUOTE
62. Acute chills
63. Chef Garten
65. Greek god of war
66. Contemptuous looks
68. Monitor spot
70. Bag
72. Sound organ
74. Marsh
75. Brazilian city, for short
78. First winner of Ewart-Daveluy Indexing Award
81. PART SEVEN OF QUOTE
83. Artefact fragment
85. Light music
86. Quit
88. Awakened
89. PART EIGHT OF QUOTE
90. Neckwear
91. Stauber's home town
92. Small society novice
93. African
94. END OF QUOTE

Down

1. Trembling tree
2. Serviceable
3. Belief
4. Acid
5. More fitting
6. Neither
7. Johnny or money
8. Music theatre
9. Berson's are useful
10. Self
11. *30 Rock*'s Fey
12. Coal scuttles
13. Tubing
14. Accepted practice
15. Marriage announcement
23. Forbidden
25. Words and music
28. Confed. soldier
30. Agile
32. Flying irritant
33. Peer
35. Hilarious joke
36. Harden
37. Texas city of mammoth fame
38. Throw
39. Ontario lake
43. Isolating attack
45. Ewe said it
47. Regretful sort
48. Nasty giant
49. Causes
51. This is one
53. Short shot
55. Elliptical
58. Simple
60. Inhale
62. Egyptian symbol of life
64. Tin Man's tool
66. Egyptian beetle
67. Spit
69. Endow with spirit
70. Dignified
71. Originate
73. Majestic
75. Stitch again
76. Goodnight girl
77. More peculiar
79. Curves
80. Roman fiddler
82. Against
84. *Les Misérables* author
87. American uncle
88. Ump

(Solution on page 28)

Crossword

Book Review
The Accidental Indexer

Nan Badgett, (Medford, NJ: Information Today, 2015), 215 pp.

In 2009 Sarah Palin released her autobiography, *Going Rogue*. It had no index. Consequently the American Society for Indexing gave the book a scorching honour—its first Golden Turkey Award. "Scholars of the political history of the early 21st century will have to consult this book, a task which the lack of an index has made nearly impossible." Nan Badgett concurs, and in her guide to the novice indexer she says so—conclusively. Years before Palin became famous, the *New York Times* ran an anonymous essay that attacked a gap in a collection, then just published, of the correspondence between Wagner and Liszt. "Here are two large volumes of matter bearing on the life and artistic development of one of the world's acknowledged geniuses, and they have no index!" Badgett's book was released earlier this year. The *Times* article ran on April 28, 1900.

Plus ça change. On my desk is Badgett's guidebook. It is called *The Accidental Indexer* and it rests next to Nancy Mulvany's *Indexing Books* (2nd ed., 2005) and Glenda Browne and Jon Jermey's *The Indexing Companion* (2007). All three tomes can stand as introductory guides, though only Badgett claims to have written largely for the novice. Each book describes how indexes are made, why they are needed, how indexers are trained, their tools, their marketing strategies, and the problems unique to the job. But Badgett adds just a bit to what we already know. She lacks the crucial details so well supplied by Mulvany and Browne and Jermey. And other writers surpass her on specific concerns. Hazel Bell is better at indexer bias and the history of indexing. F. W. Lancaster is brilliant with both technology and indexing concepts.

This guide is part of a series on information management, each by a different author and with its own unique topic. The series began in 2003 with *The Accidental Webmaster* and *The Accidental Systems Librarian.* Eleven more volumes have since come out; this year alone has also seen *The Accidental Data Librarian* (the title pattern should now be apparent). The topics are always valid but the series font is dull and the design facile. This entry is no exception.

Badgett's own strengths are solid. She shows strong common sense And a sub-chapter and appendices on contract solicitation and management provide good advice and excellent samples. She outlines with clear understanding the lone psyche of the archetypical indexer. She has wit and projects intelligence.

But the faults still snowball. The style is only competent. Contractions and exclamation points are overused. Chapter epigraphs could have given the guide some sparkle. Topical references are too numerous and will work to date the book fast. Descriptions of the principal software—CINDEX, MACREX, SKY—are each far too brief to be of use. An otherwise informative chapter on entrepreneurial indexing clocks in at only 10 pages, including endnotes. The (mild) breeziness and (relative) brevity of the book compare poorly with the density and length of *The Accidental Taxonomist* (2010), which ran to a necessary 442 pages.

I know I sound churlish. I do not question the quality of Badgett's professional mind—no reader would. Where she falls short is in how she *conveys* her expertise. The book is a failure, in the end, of size and of detail. It's all just not *enough*.

It must be said, however, that Badgett *can* spot, cut, and pin those requirements eternal to her life job. "The successful indexer must possess good taste, good judgment, the faculty of discrimination in the weighing of facts and in their proper presentation, and the habit of concise, accurate, and comprehensive thought. These qualities have been happily summed up by a writer on the subject as an eighth sense—the index sense—the faculty of feeling instinctively at a glance what subjects should be indexed and how they should be treated." That quotation is not actually from Badgett, though her declared thoughts do indeed match it. It is, in fact, from an older document, an essay also printed in the *Times*. It too rests on my desk. The author is John Denison Champlin. The publication date is January 4, 1902.

— Boyd Holmes

Executive Reports, May 2015

Membership Report

As of May 25, 2015, we have 119 members. Seven new members have joined since February's report and several members renewed late. The breakdown of the membership for location, type, and renewal period is:

WITHIN CANADA			MEMBERSHIP TYPE			EMERITUS MEMBERS:
British Columbia	29		Individual Basic	41		Chris Blackburn
Alberta	7		Individual Listed	65		Jean Wheeler
Saskatchewan	2		Student	3		
Manitoba	1		Emeritus	2		
Ontario	58		Institutional	8		NEW MEMBERS (SINCE FEBRUARY 2015):
Québec	9					
New Brunswick	1		INSTITUTIONAL MEMBERS			Joanna Bandziorowski, Kitchener, ON
Prince Edward Island	1		British Columbia	1		Rita Bates, Oakville, ON
Nova Scotia	2		Alberta	1		Sonia Hector, Oshawa, ON
Total	110		Ontario	3		Gale Rhoades, Woodland, California
			Québec	2		
OUTSIDE CANADA			United States	1		Emily Sugerman, London, ON
United States	7					Frederike Verspoor, Victoria, BC
Italy	1		RENEWAL DATE			Patti Welsh, Toronto, ON
Latvia	1		June	46		
Total	9		December	73		

Grand Total   **119**

— Frances Robinson

Treasurer's Report

We had a significant surplus (almost $4,000) this year, in spite of budgeting for an approximately equal loss. The higher-than-expected income was a result of the very successful Toronto conference, which offset slightly lower-than-expected membership and Find an Indexer fees received. Underspending in expense categories was also responsible, although that should be attributed to the executive's insistence on conservative estimates during the budgeting process. (That lesson learned, this year's budget exercise took a more realistic approach.)

No travel expenses were incurred for international liaison, as this was not a triennial meeting year and the international representatives were able to meet at the Toronto conference. Our main expenditures, besides the conference, were for *The Indexer* and our various Internet services, the mailing lists, and the website. Development of an online conference registration form was an unplanned-for expense, but now that it has been designed and implemented, the form can be used over and over.

Our reserves remain healthy, with $10,000 invested in short-term GICs, which earned $107 in interest. The current bank account remains healthy, with a balance at year-end of about $14,500. Nevertheless, the executive decided to budget for a deficit of about $1,500 in 2015 in order to accommodate unplanned expenditures.

BALANCE SHEET (as of December 31, 2014)

ASSETS		
Current		
Chequing account	14,447	
Short term		
GICs	10,369	
TOTAL ASSETS		**24,816**
LIABILITIES		
Current		
Accounts payable	-	
Equity		
Retained earnings	20,825	
Net profit/loss	3,991	
TOTAL LIABILITIES		**24,816**

Treasurer's Report
Continued from page 25

Appended to this report is a mini-report on revenues and expenditures for January to March 2015, as well as the usual full report for January to December 2014. The reason for this is that I have recommended that we change the end of the fiscal year from December 31 to March 31, for the following reasons.

Membership income for those who renew in December usually ends up spilling into the new year, with some fees arriving as late as March. Members' cheques are written in December but not banked until January, for example. I have been reluctant to use accrual reporting for membership and Find an Indexer fees

because these are not accounts receivable in the usual sense of the word—that is, people may or may not choose to renew. Reporting this income on a cash basis means that significant (apparent) variability in membership income can occur when it is split over two fiscal years. So one big reason was to consolidate the year's income more meaningfully.

Some conference expenses (usually venue deposits) are incurred across two financial years (whether December or March), which is one of the reasons I also do a separate mini-report on the conference. But my other main reason for changing the year-end is that executive changeovers occur in June—halfway through the calendar year. This leaves the executive (and especially the treasurer) to deal with a budget set by a different group of people more than half a year earlier, with a significant chunk of expenditures already incurred. A March 31 year-end allows enough time for a much more timely year-end report to be compiled and presented to the executive and at the AGM, and it leaves more room for incoming executives to implement desired changes to the society's agenda.

This is my final report as treasurer, after having served for longer than I care to remember (with one two-year break). It has been difficult to recruit new treasurers because of the perception that the incumbent should be familiar with accounting procedures. To help alleviate

ISC/SCI INCOME STATEMENT 2014

	Budget	Actual
Income		
Membership dues	11,000	9,900
Conference	10,000	14,482
Find an Indexer fees	3,200	3,080
Interest income	150	107
Miscellaneous income	100	60
Total Income	**24,450**	**27,629**
Expenses		
Membership (including directory)	50	-
Conference	11,000	11,273
Executive expenses:		
Meeting costs & telephone	300	1,310
Executive travel	1,500	-
International liaison travel	2,000	-
Bulletin	750	314
The Indexer	5,500	5,894
Website and mailing lists	3,000	3,093
Operating expenses:		
Office supplies	50	-
Mail forwarding	200	-
Postage & delivery	500	16
Bank charges	200	34
PayPal fees	600	626
Regional groups	400	25
Volunteers, honours & awards	200	-
Outside services	500	-
Translation	750	703
Promotion	500	350
Miscellaneous	500	-
Total Expenses	**28,500**	**23,638**
Income less Expenses	**–4,050**	**3,991**

2014 CONFERENCE BREAKDOWN

Revenue		
Registrations	11,392	
Banquet	1,800	
CINDEX workshops	1,290	
Total Revenue		**14,482**
Expenses		
Banquet	2,200	
Accommodation and food	7,492	
CINDEX workshops	337	
Speaker expenses	431	
Thank-you gifts	392	
Badges and program kits	160	
After-party	194	
Evaluation	58	
Total Expenses		**11,273**
Income less Expenses		**3,209**

this difficulty, I have also proposed division of the position into two roles: treasurer and bookkeeper.

Removing the bookkeeping responsibility from the treasurer's job description should make the position more attractive to people interested in joining the executive. The treasurer will be responsible for reviewing monthly reports from the bookkeeper, setting the budget, reporting to the executive and membership on financial affairs, and, of course, making financial recommendations and decisions (such as whether to continue to invest in GICs).

The bookkeeper will be responsible for banking, paying the bills, issuing receipts, and providing monthly reports to the treasurer. An additional responsibility will be to prepare revenue and expenditure reports and balance sheets for the treasurer to use in budgeting and year-end reporting, as well as to provide other financial information when required by members of the executive. I have agreed to stay on as bookkeeper to shepherd in these new procedures.

The executive's response to these proposals was positive, and it is my hope that the general membership will also be in agreement.

— Gillian Watts

ISC/SCI PARTIAL-YEAR INCOME STATEMENT, Jan 1 to Mar 31, 2015

INCOME		
Membership dues	3,160	
Conference	-	
Find an Indexer fees	895	
Interest income	150	
Miscellaneous income	90	
TOTAL INCOME		4,295
EXPENSES		
Membership (including directory)	-	
Conference	1,437	
Executive expenses:		
Meeting costs & telephone	-	
Executive travel	-	
International liaison travel	-	
Bulletin	104	
The Indexer	-	
Website and mailing lists	-	
Operating expenses:		
Office supplies	-	
Mail Forwarding	-	
Postage & delivery	-	
Bank charges	17	
PayPal fees	212	
Regional groups	25	
Volunteers, honours & awards	-	
Outside services	-	
Translation	167	
Promotion	150	
Miscellaneous	-	
TOTAL EXPENSES		2,112

ISC/SCI BUDGET, 2015

INCOME		
Membership dues	11,500	
Conference	12,000	
Find an Indexer fees	3,200	
Interest income	125	
Miscellaneous income	50	
TOTAL INCOME		26,875
EXPENSES		
Membership (including directory)	50	
Conference	12,000	
Executive expenses:		
Meeting costs & telephone	500	
Executive travel	1,000	
International liaison travel	2,000	
Bulletin	350	
The Indexer	6,000	
Website and mailing lists	3,000	
Operating expenses:		
Office supplies	50	
Mail Forwarding	-	
Postage & delivery	50	
Bank charges	150	
PayPal fees	750	
Regional groups	400	
Volunteers, honours & awards	500	
Outside services	300	
Translation	1,000	
Promotion	250	
Miscellaneous	50	
TOTAL EXPENSES		28,400
INCOME LESS EXPENSES		−1,525

International Liaison Report

American Society for Indexing (ASI)

At the ASI conference held in Seattle in late April, ISC/SCI was ably represented by François Trahan. He reported the following from that meeting:

ASI's membership is down from years past, sitting at just over 450; they are working to increase that number through membership drives. The ASI Best Indexing Practices document was recently finalized and approved by the Board; it will be posted on the ASI website within a couple of months. ASI is considering setting up SIG (special interest group) awards. Two new book titles will be released later this year, by Janet Perlman and Margie Towery, in addition to the recently released *The Accidental Indexer* by Nan Badgett. The ASI/EIS Award was won by Kate Mertes and the Hines Award was given to Carolyn Weaver. ASI is a member of a number of associations, aiming for more visibility in the publishing and related industries. Its 2016 conference will be held in Chicago.

In addition to François, five other Canadians attended the ASI conference: Judy Dunlop, Moira Calder, Julie McClung, and Joy Tataryn.

Australia and New Zealand Society of Indexers (ANZSI)

The ANZSI biennial conference, "Write, Edit, Index!" was held in early May in Canberra.

At a special general meeting on May 7, 2015, ANZSI members voted unanimously in favour of three resolutions. The most important was for a number of actions that will enable restructuring of ANZSI. Branches will be dissolved and funds centralized in an ANZSI Council account. Members will be able to create informal regional and special interest groups; some branches may morph into regional groups, but this will not necessarily happen. No formal proposals have yet been made, but there are plans to form a Melbourne group at least. The other resolutions will give ANZSI Council the choice of different time periods for officeholders (staggered two-year terms rather than annual terms) and will allow electronic general meetings, with electronic attendees counted in the quorum. This will relieve the stress of trying to get a quorum of 12 for a society with members spread over two countries.

ANZSI is unsure where its next conference will be held, and what shape it will take.

Other Society and Network News

The Netherlands Indexing Network (NIN) is planning a joint meeting with the German Network of Indexers (DNI) during the Frankfurt Book Fair, 2016.

The next conference of the China Society of Indexing and Database Management (CSIDM) will be in Chengdu, Sichuan province.

International Committee of Representatives of Indexing Societies (ICRIS)

The next triennial ICRIS meeting will be held in York, England, this September. We will be discussing small changes in wording in the ICRIS terms of reference and possibly in the international agreement between the societies.

— Heather Ebbs

ISC/SCI Archives

The archives project continues, but in fits and starts. In the fall of 2014, Gillian Watts, Stéphanie Bilodeau, and I exchanged a series of emails, detailing what we hoped to do next, but life, in the form of family responsibilities and work obligations, slowed us down. In the end we find ourselves with a slightly revised second draft of the Collection Policy, which isn't ready to distribute for review, and more questions, such as "Do we store electronic publications, such as previous editions of the Membership Directory and Find an Indexer, and if so, how and where?"

I have agreed to stay on as co-president for one more year. Over the next 12 months we may be taking only small steps towards our goals, but once I am available to devote more time to them, the archives will be my first priority. Gillian and Stéphanie have given me much to think about.

Incidentally, the first of the small steps referred to above is to collect archival materials from those who are leaving executive positions. This we hope to do over the summer.

— Jennifer Hedges

Website Administrator Report

Since the February executive meeting much work has been done and many changes have been made to the website.

Members' Section

We changed the members' logins for 2015 and, most significantly, created a "Member Benefits" section within the Members' Area. This section includes the ASI discount codes and online login access to The Indexer and the Publishing Technology Group of the Society of Indexers (PTG). ISC/SCI logo(s) for members' use will also fit well there.

Membership Payments

On May 31 or June 1, 2015, I will change the fee structure to match the agreed-upon fee increase but leave the notice of increase for another month or two. I can do all the changes—including the amounts on the registration and renewal forms and the PayPal page—but Clint at Rayola will have to do the graphic bar on the Become-a-Member page. He will prepare it for a switch on June 1.

Conference Section:

I adapted the 2014 registration databases and form to create the 2015 registration form for the conference. I also created a banquet-only attendance and payment form for the presenters. On the conference page we added text, the program, and descriptions, as well as a French version in PDF format (to avoid making the page too long to scroll).

Web Indexing SIG

Cheryl Lemmens had been the official ISC/SCI contact for many years; it's now the ISC/SCI website administrator. There's not much to do other than answer queries, and there haven't been any for a long time. So it's mainly as a contact, just in case.

Backups

Things have improved since the last report, but it's not over yet. With all the updates and new plug-ins over time, the website's functions may not work properly anymore. As a result, the backups in WordPress (WP) contain errors and at times are not completed. We also have backups at Webnames (our hosting provider), but the WP errors carry over at times, so we have to check and sometimes create a backup manually. I worked with Webnames to solve things on their side and it's better now, but not fully solved. They've been very helpful. Clint is planning to do an audit of the site to see what's not working as it used to; he didn't give a timeline. In the meantime, one of them tried to solve the issue by trying other backup plug-ins, but as of May 25 it was not fixed.

Plugin Updates in WordPress

There were a number of updates to be done as the conference registration form was uploaded, so to avoid potential issues I asked Clint to delay this. These were completed during the May 16–18 long weekend. There are a few minor issues with the membership registration form, but not with the renewal or the update-your-listing form. They solved some issues this weekend, but there are still a couple of things to fix.

Other

In late February, malware was deposited in a website folder via FTP (not the WordPress admin site). Clint changed all the logins immediately. On occasions when people/hackers try to get into the admin site, we get security notices, but there's nothing we can do other than make sure passwords are complicated and contain all sorts of characters.

— François Trahan

Bulletin Report

I just want to say thank you to everyone who has helped get the *Bulletin* back on track over the past three and a half years:

- the executive, for their wisdom and guidance;
- the writers, for submitting articles, conference reports, and crossword puzzles, both solicited and unsolicited;
- the members, for being an appreciative audience; and
- the *Bulletin* board for their support, direction, time, and effort in the midst of busy schedules.

— Marnie Lamb

I echo Marnie's sentiments. I will also underscore my appreciation for Marnie and the amazing work she's done.

— Moira Calder

ISC/SCI Ewart-Daveluy Indexing Award

This past year has seen the inauguration of the new ISC/SCI Ewart-Daveluy Indexing Award.

- Following the 2014 AGM, the panel was finalized for the 2015 award: Christine Jacobs (chair), Heather Ebbs, and Ruth Pincoe.

- English text for the website was created and translated into French.

- The awards section of the website went live in mid-November and was announced on November 18, 2014, with a deadline for nominations of January 15, 2015.

- Announcements went out as individual emails to members, on ISC-L, and through ICRIS. There was also an article in the Winter 2014 issue of the *Bulletin*.

- A reminder was sent out on January 12 via ISC-L and ICRIS.

- We received a number of submissions. We would have liked more, but there were sufficient that the panel was able to test its initial assessment rubric and come up with a clear choice of award recipient.

- The process went smoothly. We were lucky in that most recipients submitted PDF versions of the indexes and books, so we did not have to worry about exchanging physical books.

- Some sample certificates were designed and presented for approval. The "winning" certificate was finalized and printed.

- A congratulatory letter was sent from the award chair to the recipient, inviting the recipient to attend the banquet with a guest. The recipient was asked to keep this information confidential until the official announcement at the banquet.

- The recipient was to be announced at the conference banquet on May 27, 2015.

- A congratulatory letter, with a copy of the certificate presented to the recipient, will be sent to the publisher of the work.

- We were very pleased to receive the submissions that we did. As noted above, we would have liked to have seen more, but from a practical standpoint, this was probably good for our learning curve. The awards panel will meet for a final time during the conference to debrief, consider procedural modifications, polish the rubric, and suggest possible successor(s).

- Among the realizations that came to the panel was the utility of this award in encouraging and guiding professional development among indexers. The creation of an absolutely perfect index is virtually impossible, but the more we can all strive towards this, the better for the works we index and for the profession.

Award panel tasks to be completed in 2015–16 are

- creating the second awards panel,

- ensuring that an article appears in the *Bulletin* highlighting the 2015 recipient,

- preparing a short article for *The Indexer* about the new award and the first recipient,

- increasing the number of submissions by "talking it up" with more frequent calls for submissions during the fall of 2015,

- contributing to the professional development discussions that inform our annual conference and other opportunities, and

- overseeing the process for submissions and choice of recipient for 2016.

I would like to thank

- Noeline Bridge and Mary Sue Stephenson for their work on the Award Committee,

- Heather Ebbs and Ruth Pincoe for serving on the 2015 Awards Panel,

- Michèle Hudon for her help and advice,

- Heather Ebbs for copyediting,

- François Trahan for organizing the website page and its translation,

- François Trahan, Michèle Hudon, Anna Olivier, and Louise Saint-André for copy-editing the translation of the website material, and

- Jennifer Hedges and Mary Newberry, as well as the rest of ISC/SCI executive, for their ongoing encouragement and support.

— Christine Jacobs

Regional Reports, May 2015

British Columbia

Victoria-area indexers, with help from members across the country, have been busy preparing for this year's conference, when we welcome all to our beautiful provincial capital. I look forward to seeing everybody again and extend a heartfelt thank you to the many volunteers.

For the second year in a row, ISC/SCI has been a sponsor of PubPro, an "unconference" for managing editors and publication production specialists, held in Vancouver in April. The event is coordinated by our own Iva Cheung, also a member of the Editors' Association of Canada, whose BC branch is responsible for PubPro. This year we featured a flyer (thank you, Andrea Hatley) promoting our conference, since it is taking place locally, as well as a reprint of Iva Cheung's *Bulletin* review of Indexing Names, edited by Noeline Bridge, along with ordering information. Unfortunately I wasn't able to attend in person this year, but I would like to encourage everybody to check out PubPro if you have the chance. If you like, you can register for the afternoon tea only. At $5 for EAC members and $10 for non-members, it is a great networking opportunity.

I would also like to remind all BC indexers of the existence of our Yahoo Group. Feel free to use it to share information relevant to our local group, to spread the word about an interesting event, or to arrange local get-togethers. It is a great platform to get in touch with indexers in remoter areas of our province. To subscribe send a blank email to bcindexers-subscribe@yahoogroups.com.

My term as your BC representative is coming to an end, and as of this year's AGM there should be a new regional voice on the Society's executive. It has been a pleasure, and I look forward to continuing to work with you all, and perhaps to connect again at a local meeting.

— Isabel Steurer

Prairies and Northern Canada

ISC/SCI's Prairies and Northern region was represented at the Words in 3D Conference vendor marketplace on Saturday, May 23, in Edmonton (www.wordsin3d.com). The three-day conference was hosted by the Get Publishing Communications Society, the Writers' Guild of Alberta, and the Editors' Association of Canada Prairie Provinces branch. It brings together writers, publishers, and agents from across Canada. This was the second time the conference was held; the first was in May 2013, when Judy Dunlop and Adrian Mather represented ISC/SCI.

This year our information table was organized by Stephen Ullstrom and attended to by Stephen, Adrian Mather, and Moira Calder. Generally the traffic in the marketplace was light, possibly because of the tight conference schedule or perhaps reduced overall attendance. Nevertheless, a number of people who visited our table expressed an interest in learning more about indexing. Many thanks go to Stephen for taking the initiative and to Adrian and Moira for their assistance.

Looking forward, we believe we would be more effective if we could actively participate in a 3D conference session. In fact, Judy Dunlop submitted such a proposal to the organizers after the last conference but it was not accepted; we could try again before the next conference is fully planned.

During the past year we had two informal meetings for the Edmonton people at a local café. We used this time to get to know each other; to talk about our challenges, experiences, and opportunities; and to discuss the industry in general. We plan to continue meeting informally and using Skype for members who can't join us in Edmonton.

— JoAnne Burek

Central Canada

Members in Toronto have been meeting on select Saturdays most months in the past year, where we've been privileged to use meeting rooms available at Mary Newberry's workplace. Our numbers have ranged roughly from 6 to 18 members, and we usually have a nice mix of experienced and new indexers, with good discussion and sharing of indexing tips and tricks. Experienced indexers are always willing to share their knowledge with those just entering the profession.

We've discussed a variety of topics, such as what makes a good index; how you approach the text; what work techniques you use; subheading structure and

Central Canada
Continued from page 31

rationale; the business element of indexing; and marketing and communicating with publishers. These meetings are a wonderful venue for sharing experiences. Often we drift off topic but it usually takes us to a place of interest.

At one meeting, one of our members offered her index for peer review. This is an invaluable tool for learning useful indexing techniques. It's a hands-on opportunity to hear from the index creator about indexing decisions and challenges that may have been faced in the text. At one meeting, we listened to a one-of-a-kind presentation on image indexing for the Marvel Comics 75th anniversary book. The subject matter demonstrated that detailed knowledge can be essential to creating an effective and accurate index—and we all learned about superheroes past and present!

This past year, Stephanie Watt (our former Eastern Canada rep, who lives in Montréal) and I began to collaborate to plan indexing meetings in Ottawa. Stephanie was the major player in organizing this new venture, and three meetings were held in Ottawa. While Stephanie and I weren't able to go to all the meetings, a small but dedicated group of Ottawa area indexers gathered to meet.

Topics of interest for future meetings in both Ottawa and Toronto will continue. Our goal is to provide more opportunities for indexers to meet, to learn, and to share ideas.

— Margaret de Boer

Eastern Canada

Stephanie Watt was the Eastern Canada representative from June 2014 until February 2015. In February she asked me to take over so she could focus on her pregnancy and expected baby. Thank you, Stephanie, for your time on the executive, and congratulations to you on the birth of your beautiful baby boy!

The eastern area covers the wide geographical region of Québec and Atlantic Canada. There are 16 members (nine from Québec and seven from Atlantic Canada) in this region. Meetings were held in Ottawa for the people in western Québec, and in Dartmouth, NS, for residents of Atlantic Canada. An additional 13 members and three non-members from eastern Ontario were invited to the Ottawa meetings. An additional four non-members were invited to the Dartmouth meetings.

Stephanie Watt, Margaret de Boer, and Clive Pyne organized the September, November, February, and April meetings in Ottawa. There was a good turnout for the first two meetings, but a snowstorm prevented many from attending the February meeting. In April, only three people attended.

I organized a meeting in October in Dartmouth. Four of us attended (three members and a non-member). We decided to meet twice a year, possibly alternating between the Halifax area and Sackville, NB (to accommodate the members from PEI and NB). Though I tried to gather people for two spring meetings, conflicting schedules made this impossible.

We will continue to organize meetings in both Ottawa and Atlantic Canada. Thank you for the opportunity of serving on the executive.

— Alex Peace

Upcoming Events, Meetings, and Webinars
Continued from page 3

October 2015

ASI Webinar—Noeline Bridge on indexing names, **October 20**. Visit http://www.asindexing.org/category/webinars/ regularly to check updates.

ASI Chicago/Great Lakes Chapter fall workshops—Enid Zafran featured presenter—**October 23-24**. Visit http://www.chicagogreatlakesindexers.org/events.html for information and registration details.

November 2015

ASI Webinar—CINDEX Tips and Techniques with Frances Lennie. No date confirmed yet, but visit http://www.asindexing.org/category/webinars/ regularly to check for more information and registration details.

China Society of Indexing and Database Management (CSIDM) Annual Conference, Sichuan University, Chengdu, China, in mid-November**.**

January 2016

ASI Webinar—Margie Towery on evaluating indexes. No date is confirmed, but visit http://www.asindexing.org/category/webinars/ to check for updates.

June 2016

Joint **ASI and ISC/SCI Conference**, Chicago. Visit http://indexers.ca/annual-conference/ for updates.

New Board Members Introduce Themselves

Margaret de Boer, Co-president

Hi, I'm Margaret de Boer. I live in Toronto, where I've been freelance indexing for almost four years. For 20 years before that, I was a website indexer for print and broadcast news media. I volunteered as the ISC/SCI Central Canada representative for the past two years, and now I look forward to the next two years, serving my term as co-president. Becoming involved in ISC/SCI has introduced me to many knowledgeable and encouraging indexers—I'm grateful to be part of this great organization!

François Trahan, Vice-president

As ISC/SCI vice-president from 2011–13 I became very involved in renewal of the ISC/SCI website and that took most of my volunteer time until June 2013. As the executive changed for 2013–15, I decided to continue as website administrator to make sure the site was well established. Now that it is, I'm returning to the vice-president role. I'm not sure where that will take me this time.

Sergey Lobachev, Treasurer

After a short but productive academic career and several years of library experience, I discovered, in the business of indexing, true intellectual freedom, independence from all kinds of institutions and bureaucracy, self-respect, and a reliable collaborative environment. My expertise spans from 17th-century Russian history to open-source content-management systems. I also write book reviews for *Publishers Weekly* and research academic journals.

John Barkwell, Member-at-large

Hi, I'm John Barkwell. I served as ISC/SCI vice-president for one year, beginning in 2013, before taking a one-year hiatus from indexing to help my wife (in Comox, BC) settle her mother (in Montréal) into a nursing home. Before becoming a freelance indexer, I spent 30 years as a trial lawyer. I look forward to serving the entire two years of my term as ISC/SCI member-at-large.

Stephen Ullstrom, Website Administrator

Hello, I'm Stephen Ullstrom. I love cycling, especially through the city at night, when the streets are dark and hushed. Two summers ago I cycled the Ride the Divide route along the Rocky Mountains, from Banff to the Mexican border. I look forward to serving as your web administrator.

Andrea Hatley, Editor, *Bulletin*

I'm looking forward to fulfilling my commitment as the *Bulletin* editor. I bring with me an eclectic background in terms of education and work and life experiences. Originally from Montréal, I have lived in almost every province and territory but call northern Manitoba home (for now).

Elena Gwynne, British Columbia

My name is Elena Gwynne. I'm a newer indexer, but I absolutely love the work! I've taken on the challenge of being ISC/SCI's BC representative.

Siusan Moffat, Central Canada

I'm Siusan Moffat, ISC/SCI Central Canada representative. My interest in indexing began when I wrote two dessert cookbooks and put together the indexes myself. Many years later I finished a diploma in technical communications and the intensive Berkeley indexing course. I'm very honoured to be on the executive of ISC/SCI and am excited to be meeting many more of you in the next two years.

Alexandra Peace, Eastern Canada

Hello, I'm Alexandra Peace and I started as ISC/SCI Eastern representative in February, replacing Stephanie Watts. I am a freelance editor and indexer living in the beautiful Annapolis Valley of Nova Scotia. I'm excited to be working with members of the executive over the next while.

New Board Members Introduce Themselves

CINDEX™ Roundtable Discussion

Continued from page 7

their corresponding common names, as well as pharmaceutical terms along with their trade names.

Look for the Swap Text icon in the toolbar to the record entry window, or use the keyboard shortcuts: Control Shift S (Windows) or Control P (Mac).

Q6: How can I best ensure accuracy of the page numbers I add to the page field?

A: There are several settings under Preferences/Editing, and also at Document/Reference Syntax/Page References, that can help you maintain accuracy, but two newer tools provide an added degree of efficiency.

CINDEX will automatically complete a page range upon keying the hyphen. You need to tell CINDEX to do this in Preferences/Editing/General /Complete Page Ranges. CINDEX will complete the range by adding 1, but if that isn't enough, you can use the keyboard shortcut Control-] to increment the range to the value you need. If you overshoot, use Control-[to decrease the range. To achieve these increment/decrement functions, you do not need to have the cursor positioned in the page field.

Q7: I know how to highlight contiguous entries or an entry array to form a group (temporary or otherwise), but how can I do the same for non-contiguous entries?

A: Using Edit/Labeled, label the individual entries you wish to gather together in a group. Then use Edit/Find/Labeled and select the label colour to find all the records you've selected.

For follow-up or to ask additional questions, contact Frances S. Lennie at flennie@indexres.com.

— Frances S. Lennie

Note:

Many of the above items will be demonstrated in a CINDEX™ Tips and Techniques webinar hosted by ASI. Check the ASI or Indexing Research websites for date and time. ISC/SCI members are eligible for the ASI member rate.

Crossword Solution

1 A	2 U	3 T	4 U	5 M	6 N		7 C	8 O	9 M	10 E	11 T	12 H		13 P	14 U	15 B
16 S	T	E	R	E	O		17 A	D	A	G	I	O		18 I	S	A
19 P	I	N	I	E	R		20 S	E	C	O	N	D		21 P	A	N
22 E	L	E	C	T		23 T	H	O	R		24 A	S	25 S	I	G	N
26 N	E	T		27 E	28 R	A		29 N	O	30 S		31 O	N	E	S
		32 G	R	E	B	33 E		34 S	P	35 R	36 I	N	G	
37 W	38 H	39 E	N		40 B	O	A		41 R	I	N	G	
42 A	U	R	A	43 S		44 O	R	45 B		46 Y	O	U		47 R	48 O	49 W
50 C	R	I	T	I	C		52 L	A	53 C		54 T	R	55 O	U	G	H
56 O	L	E		57 E	L	58 M		59 A	H	60 S		61 E	V	E	R	Y
		62 A	G	U	E		63 I	N	64 A		65 A	R	E	S
	66 S	N	E	E	R	67 S		68 P	I	X	E	69 L	
70 S	71 A	C	K		72 E	A	73 R		74 F	E	N		75 R	76 I	77 O
78 T	R	A	H	A	N		81 L	E	A	82 F		83 S	H	E	84 R	D
85 A	I	R		86 R	E	87 S	I	G	N		88 R	O	U	S	E	D
89 I	S	A		90 C	R	A	V	A	T		91 E	U	G	E	N	E
92 D	E	B		93 S	O	M	A	L	I		94 F	L	O	W	E	R

Of note: Albert Camus, the author of this timely fall quotation, was strongly influenced by 84 Down.

CINDEX™ Roundtable Discussion (continued)/Crossword Solution