



INDEXING SOCIETY  
OF CANADA

SOCIÉTÉ CANADIENNE  
D'INDEXATION

Annual Report

2018–2019

May 24, 2019

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## *About the Association*

The Indexing Society of Canada / Société canadienne d'indexation (ISC/SCI) is Canada's national association of indexers. Established in 1977 as the Indexing and Abstracting Society of Canada / Société canadienne pour l'analyse de documents (IASC/SCAD), we changed our name in 2006 to reflect the fact that indexing is the major specialty of our members.

Our mission is to

- encourage the production and use of indexes;
- promote the recognition of indexers;
- disseminate information on indexing techniques; and
- provide a means of communication among individual indexers across Canada.

Our vision is "Accessible information; informed people."

### **Awards**

The Ewart-Daveluy Award is presented each year to an individual who has created an index that demonstrates outstanding expertise, ability to analyze complex text and ability to design an index that significantly enhances reader use of the text.

The Tamarack Award was instituted in 2004 by Ruth Pincoe, then president, to recognize members who go "above and beyond the call of duty" in their volunteer work for the Society.

Certificates of Recognition are also given out by the presidents in recognition for members who contributed in a meaningful way.

### **International affiliation**

We maintain close ties with the global indexing community both formally, through an international agreement, and informally through our sharing of education, news, and attendance at national conferences.

### **Membership**

ISC/SCI membership is open to individuals and institutions anywhere in the world. Full-time students are offered a discounted rate.

### **Communications**

The Society maintains a number of ways of communicating. The members have an email list and the newsletter that is published three times a year. On our website, we maintain a list of resources on indexing and indexes.

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## *Executive Committee for 2018-2019*

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Co-President, Senior	Margaret de Boer
Co-President, Junior	Alexandra Peace
Treasurer	Andrea Hatley
Communications	JoAnne Burek
BC Regional Representative	Elena Gwynne
Prairies and Northern Regional Representative	Stephen Ullstrom
Central Regional Representative	Pierre Joyal
Eastern Regional Representative	Susan Brown
<i>Bulletin</i> Managing Editor	Catherine Plear
<i>Bulletin</i> Production Editor	Sergey Lobachev
Past-President	Mary Newberry
Membership	Frances Robinson
Website Administration	Siusan Moffat
International Liaison	François Trahan

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## *Co-Presidents (Margaret de Boer and Alexandra Peace)*

We, Margaret and Alex, had a great working relationship, talking often about our presidential to-do lists and our work and life. Here are some of the tasks we accomplished this past year:

- We recruited Christine Jacobs to attend the ICRIS meeting on behalf of ISC/SCI, and we recruited François Trahan to be the ongoing representative.
- We put a position description together for a recording secretary and recruited Evelyn Ebbs, who will start with the May 23, 2019, executive committee meeting.
- We, with the help of Mary Newberry, recruited a full slate of executive committee members to take to the members.

And, we did manage to do a few other things besides recruiting!

- We welcomed Catherine Plear to the executive committee.
- We worked on creating generic documents and checklists, hoping to make it easier for future presidents.
- We worked with all the committees in varying degrees of support.
- We prepared for the AGM, including deciding on who to give the Tamarack Award and the certificates of recognition to, and gathered names of all the volunteers.
- We organized a publicity exchange with Editors Canada.
- We worked on securing location, venue, and the beginnings of the committee for Conference 2020.
- We worked with Christine and Mary to retrieve fifteen boxes of archival material and get the archives committee started up.

We had a lot of fun working together and supporting each other. Margaret will take her hard-earned rest after the end of her term, and Alex will work in new ways with the next executive committee.

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## *Prairie and Northern Canada Regional (Stephen Ullstrom)*

The prairie group has grown this last year, with currently fifteen members. We have new members from Winnipeg, Calgary, and the USA.

We have met three times since the last AGM, on August 4, 2018, October 27, 2019, and March 2, 2019. Meetings are an informal opportunity to discuss our work and to ask questions about indexing. Attendance continues to be a mix of in-person and by Skype. So we can hear each other over Skype, we book a quiet room at the Edmonton Public Library, which usually works quite well.

Last summer I also gave two presentations, to raise awareness about indexing. The first was on June 21, 2018, to the Editors Canada twig in Edmonton. About a dozen people attended. On July 7, 2018, I then presented a webinar for the Writers Guild of Alberta, with

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eight people in attendance. For both, the audiences were small but seemed engaged. I think if we seek such opportunities, we will likely find people who are interested.

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### *Central Regional Report, May 16, 2019 Meeting (Pierre Joyal)*

The Central indexers first meeting this Fall was held on September 15, 2018. It was well attended although we had to compete with the TIFF film festival. The meeting looked at Word Software indexing tools and how to index a word document. The meeting was very interactive, all 6 participants contributing to a rich discussion on the merits and challenges of using the Word Software indexing tool.

Two other meetings were held in Toronto on October 20 and November 17, 2018. At the October meeting, we discussed an article on online content and the indexer role by Alexandra Bell. I also spoke about a Rob Hanna presentation I attended on Micro Content. On November 17, I reported on the Taxonomy boot camp I attended in Washington DC.

Meetings resumed on February 23, 2019. Discussions centered around indexing questions encountered while indexing a recent book. The discussions centered on indexable topics. The meeting was rescheduled from the previous week when it was pointed out that this was a long weekend celebrating Family Day.

The March 16 meeting build on the subject of indexable topics. Using Do Mi's *Facing the Text*, some of the questions discussed: when to index proper names; borderline topics; similar topics

Meetings in Toronto were held at a Member's condo building meeting room. Most meetings were well attended, typical attendance being about 8 indexers.

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### *Archive Committee (Christine Jacobs)*

#### **Mandate**

This committee will gather all material (including digital and physical), research the relevance of the material, research the best methods of keeping the material, and report on all of this to the executive committee.

This committee will then start the work of archiving the material and will create a documented method of doing so.

#### **Progress**

It has been determined that Peter Greig in Ottawa has fifteen boxes of ISC/SCI material including the history of the formation of the society. Mary Newberry, Christine Jacobs, and Alexandra Peace have made plans to obtain this material and move it to Montréal for examination.

Christine will be chairing this committee, and two other members have been recruited: Siusan Moffat and Carlisle Froese. Christine has also organized a fieldwork placement for a student to work with the collection for 105 hours over the next six months.

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## *Ewart-Daveluy Indexing Award (Mary Newberry)*

The ISC/SCI Ewart-Daveluy Indexing Award was not awarded this year, 2018–19. We received less than three submissions. Technically, an award can still be granted when there are low submission numbers. The Ewart-Daveluy Award is not a competition among submissions, but rather a recognition of indexing excellence.

Our focus going forward will be to encourage members to submit. We received the following suggestions regarding ways to increase submissions:

- Circulate the number of submissions – the thought here is that people may be intimidated thinking about the competition and surprised to hear of how few people are submitting
- Newer indexers may feel intimidated – is there a way to encourage them to submit?
- Offering feedback – introduced for the first time last year (2017-18) – should be emphasized as a benefit of submission and may encourage newer indexers to submit their work, particularly when they learn the number of people submitting is low, which increases the likelihood that they will be one of the 3 runners-up to receive feedback.
- Have a panel presentation at the next conference or at local regional meetings of indexing instructors and indexing award winners to discuss what is involved
- Display copies of award-winning indexes and texts at the conference
- Improve early promotion of award

### **Timeline Past Year**

- 16 November 2018 Call for nominations to all ISC/SCI members
- November and December distribute more widely (not completed)
  - EAC list, on Facebook (EAC page, personal page), on ICRIS, in Bulletin, indexing listservs; indexing schools & university library science departments
- February 2019 Online submission form live
- February 2019 Reminder to all ISC/SCI members
- 25 February 2019 Deadline for submissions

### **Timeline Post-AGM**

- With input from Communications, develop Press Release promoting award and encouraging submissions
- Distribute widely:
  - EAC list, on Facebook (EAC page, personal page), on ICRIS, in Bulletin, indexing listservs; indexing schools & university library science departments; Quill & Quire, BPC - elsewhere?
- Identify new judge for the panel (usually, coordinator drops off panel; most experienced judge becomes coordinator; new judge is appointed). The panel members are listed on the website.

- Update process for incoming judge

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### *Bulletin (Catherine Plear)*

I recently came on board as editor of the Bulletin and I'm working toward the August issue. To help me get up to speed, Alexandra Peace gave generously of her time by meeting with me several times by Skype to fill me in on details, procedures, and history.

For the August issue, Stephen Ullstrom and François Trahan have agreed to write articles covering the ISC and ASI conferences respectively. Writers are still needed to cover the ISC keynote address and Enid Zafran's workshop—all suggestions are welcome.

To help ensure continuity, I've reached out to the members who in the past have copy edited and proofread the Bulletin. We continue to be grateful for their talent, energy, and time.

I've also reached out to Heather Ebbs about regarding continuing the puzzle.

Time lines are being developed for each issue.

Sergey and I have a Skype meeting planned to discuss workflow and timing, with a view to streamlining processes.

We appreciate the involvement of all who have contributed in any way to the Bulletin over the past year.

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### *Communications (JoAnne Burek)*

#### **Industry publicity**

We sent press releases to a list of publishing and writing associations, Editors Canada, and our sister societies. These included announcements of the winner of the Ewart-Daveluy Award, the Mary Newberry Mentorship program. You can find them on our member page on the website of the Business and Periodical Council ([thebpc.ca](http://thebpc.ca)).

Last year was the 40<sup>th</sup> Anniversary of the Editors Association of Canada. In November we were invited to contribute a short article for their membership magazine "Active Voice".

For industry events, we purchased a table runner with our logo. It folds neatly into an envelope for shipping around the country. It arrived just in time for "Word on the Street" in Toronto. Thanks go to Linda Christian for reworking our logo so that it would print this big:





### **Welcome Letter to Indexing Students**

Our welcome letter was updated and distributed to students of indexing courses at Mohawk College and Simon Fraser University.

The letter introduces them to our Society in a friendly way, tells them what they can find on the website, and invites them to contact our regional reps. We have both a PDF and an email version of the letter.

### **Website Updates**

The beginning of May this year was all about technical woes. We fixed the problem of random page errors that we had been observing since March. But bringing the website back into production took longer than expected. As a result, the website was unavailable from Thursday, May 2 to Sunday May 5.

Then, when the website was back, we discovered an issue with PayPal. So, we quickly moved to an alternative, highly-rated payment processor called Stripe.

Members are likely to find it much easier to pay by credit card with the new system.

Other improvements made this year:

- Members now get more than one reminder before memberships expire.
- The profiles on the Find an Indexer are presented in random order.

Website issues are outside the scope of the Communications position. I will still be the one to handle these. If you have any suggestions or questions about the website, please contact me directly, or send a message using the Contact Form on the website.

Respectfully submitted,

JoAnne Burek

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## *International Liaison to ICRIS (International Committee of Representatives of Indexing Societies) (François Trahan)*

This is my first six months as ICRIS representative (or International Liaison in ISC/SCI terminology). Thank you to my predecessors Mary Newberry and Heather Ebbs and also to Christine Jacobs who represented the ISC/SCI at the ICRIS triennial in China: I had a wealth of knowledge and advice to guide me through this initial period. The triennial, which took place in Shanghai in October 2018, seems to have been a period of change for ICRIS representatives – there are now two new co-coordinators for ICRIS (P. Bosschieter and C. Diepeveen) and few of those present in Shanghai are now official representatives of the seven societies and two groups/networks that make up ICRIS. Between triennials there are informal ICRIS meetings at each annual conference held by one of its member countries, whenever there are enough international representatives to warrant it.

### **Conferences attended: Shanghai (CSI) and Phoenix, AZ (ASI)**

Christine Jacobs represented the ISC/SCI at the Shanghai conference that followed the triennial meeting. You can read about both in the *Bulletin*. For the conference, see “Shanghai Impressions” in the Spring/printemps 2019 issue, pages 16–18, as well as Glenda Browne’s article in *The Indexer* (vol. 37, no. 1) on pages 69–80.

François attended the ASI conference in Phoenix (April 2019) where we had an informal ICRIS meeting (see below for details).

### **ICRIS meetings: Triennial in Shanghai and informal meeting in Phoenix, AZ**

Christine Jacobs represented the ISC/SCI at the Shanghai triennial. Christine wrote an article for the *Bulletin*, issue Spring/printemps 2019, pages 13–15. There is also a report by the ICRIS coordinators in *The Indexer* (vol. 37, no. 1) on pages 63–68.

Informal meeting in Phoenix, AZ (ASI, 25–27 April 2019): There were five international representatives at our meeting before the opening reception: ANZSI, ASAIB, DNI, our host the ASI, and ISC/SCI. We went around the table for updates on each society’s activities since the triennial in Shanghai last October. It’s fascinating to hear about everything that each society does, there is such enthusiasm and dedication. A review of the meeting and ASI conference will be published in the next issue of *Bulletin*.

International representatives will meet the day before the ISC/SCI conference in Ottawa.

### **ICRIS minutes, International Agreement, and Terms of Reference**

The International Agreement and the Terms of References were amended at the triennial in Shanghai. All the changes are listed in the minutes of the meeting and were voted on by the representatives in Shanghai. Each member is then required to vote on those changes.

The ISC/SCI executive voted to approve the changes (done by email during the week of 10–17 February 2019) and so did all other ICRIS members.

The three documents are available through The Indexer website ([www.theindexer.org](http://www.theindexer.org)), under the tab “International”.

### **The Indexer website**

The website has been changed since production has moved to Liverpool University Press. Subscribers now have online access to recently published issues and two indexes (author and title) run from volume 1 to the current issue whereas the subject index is limited to the years 1996 to 2010 for now. There’s also a useful Content by category section.

### **National Indexing Day (March 2019)**

The Society of Indexers (UK) held events on 28 March in Liverpool and so did ANZSI (Australia and New Zealand/Aotearoa) on various dates through four different events in separate states. You can read about this in their respective newsletters, found in the members’ section of the ISC/SCI website.

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### ***Membership (Frances Robinson)***

In the June 2018 membership report we had 109 members. Since then, until the May 2019 report, 19 members did not renew and we acquired 15 new members; current total is 104 memberships.

Membership for British Columbia and Quebec fell 28% and 36% respectively; all the other provinces held steady (-1 to +1) for the year. We have 14 American members in May 2019 compared to 9 in June 2018, for an increase of 56% (1 new Listed and 4 new Basic memberships). There is currently one European member (Germany).

Over all, Basic membership decreased from 36 to 31 (14%), Listed membership increased by 3, and Student membership decreased by 3. Institutional membership held steady at 7, including 2 in the United States. We have 2 Emeritus members.

During this past year, the Membership Secretary

- maintained the membership lists for the Society;
- maintained the executive and the general list servs;
- generated and distributed individual lists for the Regional Representatives a few times per year;
- assisted individual members with their queries, or forwarded those queries to the appropriate executive member;
- attended all the executive meetings, either in person or by Skype;
- made herself available to assist with transition from the old website to the new website from a membership record viewpoint;
- has been a member of the Special Projects Committee since its inception.

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## *Mary Newberry Mentorship Program (Stephen Ullstrom and Linda Christian)*

This has been the first year for the mentorship program, and a lot has been accomplished.

The program was officially announced at the last AGM, in 2018. The goal this year was to take the proposal, which had been approved by the executive, and turn it into a functioning program. To accomplish this, the following steps have been taken:

- Linda Christian and Stephen Ullstrom were recruited and appointed as coordinators to run the program.
- Documentation has been created and processes are being established for how mentorship will happen. For this, we have created application forms for mentees, the mentorship agreement and logbook, a confidentiality agreement, dispute resolution policy, fee policy, and evaluation forms. We have also posted details about the program on the ISC/SCI website.
- A pool of mentors has been recruited. We are thankful for the experienced indexers who have offered their time and knowledge.
- In January of this year, the program was soft launched, with a call put out for applications from mentees. So far, three mentorships are completed or underway.
- Stephen Ullstrom wrote an article explaining the program for the March 2019 issue of *The Indexer*. A follow-up article is planned for next year, once we have some more experience and feedback from current mentors and mentees.

Going forward, Stephen Ullstrom is stepping down as coordinator. Alexandra Jory has agreed to take over, while Linda Christian will continue for another year. We look forward to seeing how the program will continue to grow. If you have been thinking about submitting an application, please do.

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## *Outreach Committee (Siusan Moffat)*

### **What and who:**

The Outreach Committee is a new committee consisting of three separate groups.

**Publishing group:** This group does outreach to publishers, making sure they are aware of ISC and what we can offer them. Joan Shapiro of ASI is head of the publishers outreach group in ASI. She has agreed to liaison with our group and exchange ideas.

**Users/Usability:** This group will outreach to users through surveys, usability studies, tabling events, presentations, etc.

**TIDE (The Inclusion, Diversity and Equity committee):** This group's mission is to fully reflect the diversity of Canadian society and to be able to provide high quality indexes to diverse elements outside the society. The group will focus on stakeholders inside and

outside ISC to promote the importance of diversity, inclusion and equity as well as professional ISC indexes. More info is available on the TIDE webpage, under committees.

**Technology/Skills:** As technology grows and changes this will have an impact on indexers. This group keeps members informed about changes ahead that might affect us as well as new technology that could be beneficial to our everyday indexing. This group also looks to match indexing skills with other/new industries and outlets.

### **Projects:**

Outreach is bouncing along with various members working on their own projects.

**Users/Usability** is currently constructing a survey for members on usability. The group is also planning to table several events to promote indexes. Last year ISC tabled with Editors Canada at Word on the Street Toronto and connected with many interested folks. If you are interested in researching and setting up events in your area, please get in touch!  
outreach@indexers.ca

**Publishing** has about 100 letters to publishers planned, letting them know about ISC and our services.

**TIDE** is moving forward with the bursary for structurally disadvantaged people, has their webpage with their mission statement up, have been given the green light for \$250 for a diversity/anti-oppression webinar, and is in the process of writing a TIDE related article for the Bulletin. The bursary needs more people to help conceive and implement, please get in touch if you are able! tide@indexers.ca

**Technology/Skills** continues to research how indexers skills can be used in other realms.

**If you are interested in joining any Outreach groups please get in touch!**  
outreach@indexers.ca

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## *Special Projects Committee (Alexandra Peace on behalf of the committee)*

### **About the Committee**

This standing committee was struck in 2017 to assess projects for ISC/SCI to spend money on. The committee started with proposals from the executive committee. It also sent out a request to the membership for proposals.

Several suggestions were received, and we chose a scholarship for structurally disadvantaged persons as our first project.

### **First Project**

We researched and discussed the proposal extensively and after much thought, presented a recommendation to the executive committee.

We asked the executive committee to accept our recommendation with funding up to \$1500:

- We recommend that the bursary include the following:
  - tuition fees for either the Berkeley indexing course or the Ryerson indexing course
  - two years of membership with listing
  - a session in the mentorship program
- We recommend that the Inclusion, Diversity, and Equity committee administer the bursary. As part of administering this bursary, the committee will need to carefully create a definition for what it means to be structurally disadvantaged.
- We have attached an appendix with a list of resources for the committee ... some of the resources have good wording for applications, criteria, and so forth, and some of them are places where information about the bursary could be publicized. An expansion of this material will be made available to the committee.

This recommendation was accepted. Further details of our research and discussions can be found in the reports of the minutes from January 26, 2019.

## **Second Project**

We then put out a second call for proposals. We received several and added them to the ones already on the list.

We put a call out for ideas to consider, and they include the following (both older ones and new):

- publisher's award
- CMoS subscription discount
- Literary Marketplace subscription discount
- conference speaker
- conference scholarship
- indexer honorarium and mentorship fee paid for indexing of the Bulletin
- hire someone to coordinate a marketing campaign on the value of hiring an indexer, perhaps in conjunction with Indexing Day
- salary survey

We decided to work on the conference scholarship next. We have generated some questions to research and plan to meet soon to discuss the project.

In addition, we wrote a blurb for our page on the website.

Respectfully submitted by the Special Projects Committee, May 23, 2019

Maria van Buren

Siusan Moffat

Frances Robinson

Alexandra Peace

Ronnie Seagren

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## *Treasurer (Andrea Hatley)*

### **Executive Summary:**

In the 2018-2019 fiscal year, the Society generated a total income of \$25,426, of which \$12,047 was attributed to the conference and \$13,216 to membership registrations and Find an Indexer fees. Overall expenses tallied in at \$23,914, resulting in a net profit to the Society of \$1,512. Of this \$1,111 was attributed to the 2018 Winnipeg conference.

The proposed 2019–2020 budget, excluding the conference revenue/expenses and the extraordinary expenses, will result in a deficit of \$1203; the conference is anticipated to break even or make a slight profit. Additional spending of \$4050 for extraordinary expenses and \$5,000 for special projects was also approved. The total available funds that the Society has for special projects as of 31 March 2019 is \$19,739.

The Society executive voted on the 4 May to increase membership and Find an Indexer fees in order to offset the increased subscription of The Indexer and other operating costs. The membership fee increase and the budget are presented to members for ratification at the AGM.

### **Highlights 2018–2019:**

*First Quarter (April to June 2018):* Compilation of 4<sup>th</sup> quarter and yearend 2017–2018 financial statements as well as 2018-2019 budget preparations. The 2018-2019 budget was approved by the membership at the AGM in June 2018.

*Second Quarter (July to September 2018):* Preparation and posting on website of 1st quarter financial statements. Some conference expenses still to be submitted, but everything within budgeted figures. A TD special offer \$8,000 GIC was purchased in July. Gillian Watts resigned as bookkeeper as of 31 August.

*Third Quarter (October to December 2018):* Preparation and posting on website of 2nd quarter financial statements, along with adjustments to previous statements. Income on par with previous year; international liaison travel budget needs the attention of the board—recommended a policy be developed to provide some consistency. Developed an expense reimbursement policy and an invoice accountability policy, both of which were adopted. Outlined bookkeeper responsibilities and posted notice for a volunteer. Created spreadsheet for conference revenue and expenses to align with the ISC's accounting software. Business bank account was switched to a lower-fee, non-profit account.

*Fourth Quarter (January to March 2019):* Preparation and posting on website of 3rd quarter financial statements. No responses to the bookkeeper advertisement, the QuickBooks software makes it manageable without one, and the finance committee provides sufficient oversight. Requested that all fees charged—membership, listing, all conference, mentorship, etc.—be unique to simplify bookkeeping.

*April and May 2019:* Compilation of 4th quarter and yearend 2018–2019 financial statements as well as 2019-2020 budget preparations. The following recommendations were made:

- Establish whether there is value in, and show how the Society benefits from, sending print copies of the Bulletin to institutional members; their current membership fee does not cover this cost



- Advertise the Ewart-Daveluy award more prominently
- Discuss with the regional representatives their financial, and other, needs
- Multiple-year membership prepayments not be accepted; the option for multiple-year memberships as a category can be discussed at some other time

Two policies were developed: an expense reimbursement policy for the treasurer requiring board approval and a financial guidance policy for committees needing procedures for the collection and disbursement of funds.

The finance committee met five times over the year; reviewing the financial statements and providing excellent feedback on concerns and issues. Thank you, Margaret de Boer and Susan Brown. JoAnne Burek participated in the final meeting of this committee as an introduction to her new role as treasurer.

Andrea Hatley

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### *Website Administration (Siusan Moffat)*

This year new webpages were created for our various committees.

There were some issues with Wordpress and many of you may have found accessing the ISC website troublesome at times. JoAnne Burek worked tirelessly with Wordpress to fix these issues and we are back on track. Thanks JoAnne!

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### *Ad Hoc Committee on Bulletin Policies and Procedures (Alexandra Peace on behalf of the committee)*

This committee has worked hard this year and accomplished much. The committee started to examine aspects of the production of the *Bulletin* to make recommendations on policies and procedures.

Midway through this work, the committee decided to put an issue out: Volume 40, Issue 1 (Fall 2018). This provided good experience and raised further questions.

As the committee had not yet found a managing editor, a second issue was produced: Volume 41, Issue 1 (Spring 2019).

The committee then carried on and completed its task of developing the policies and procedures. This document is waiting approval from the executive committee.

Additionally, the committee found a managing editor: Catherine Plear (report below). Catherine was included in the final stages of work on the Spring 2019 issue and is now ready to take over for the post-conference issue.

Respectfully submitted, May 24, 2019

JoAnne Burek, Moira Calder, Sergey Lobachev, Janice Logan, Alexandra Peace