



INDEXING SOCIETY
OF CANADA
SOCIÉTÉ CANADIENNE
D'INDEXATION

Annual Report, 2020–2021

June 19, 2021

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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.

Magpie Kudos are given by members to other members through a form on the website. The person may remain anonymous if wished. The member thanked gets an email and will be named in the next issue of the *Bulletin*.

Events

Each spring, we hold our two-day national conference. Members and public are treated to Canadian and international speakers on the topics of indexing, publishing, and the business of freelancing.

Our regional groups host meetups throughout the year.

We hold a national monthly video chat for all members.

Find an Indexer

Anyone who needs an index written can find an indexer in the *Register of Indexers Available* on our website. The *Register* is searchable by language (English and French), subject area, type of material, and keyword.

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 to the members: the *Bulletin*, the Society newsletter that is published three times a year; an email list for members; and posts on our website, where we also maintain a list of resources on indexing and indexes.

Executive Committee, 2019–2021

| | |
|---|-------------------------------|
| President | Alexandra Peace |
| Past President | Margaret de Boer |
| Membership | Lisa Fedorak/Julia White |
| Treasurer | JoAnne Burek |
| Communications | Maria Hypponen/Judith Clark |
| BC Regional Representative | Lisa Fedorak |
| Prairies and Northern Regional Representative | Stephen Ullstrom |
| Central Regional Representative | Ronnie Seagren |
| Eastern Regional Representative | Jason Begy |
| <i>Bulletin</i> Managing Editor | Catherine Plear/Vicki Gregory |
| Website Administration | JoAnne Burek |

Appointed Positions

| | |
|-----------------------|-----------------|
| International Liaison | François Trahan |
| Recording Secretary | Carlisle Froese |

President (Alexandra Peace)

Though this year has been a bit more difficult for various reasons, it has also been a great year for ISC/SCI . . . our membership numbers are up, our volunteer numbers are up, and we have accomplished a lot.

Here are a few of the things I've worked on over the past year.

Administration

When the publication of the *Indexer* changed over from Society of Indexers (SI) to Liverpool University Press (LUP), they requested sixteen membership reports a year, which meant a huge amount of work for the membership secretary. I was able to get it down to four times a year, just before the mailing. In the end, this turned out to be better all together, since it had been extra work for everyone.

I communicated with the executive committee and the long-time members about the illness and death of Gale Rhoades and I wrote up an announcement to go out to the members and on the website. I asked Heather Ebbs to write something up for the *Bulletin*.

In addition, there were various small tasks that I performed, including the following:

- wrote to lapsed members at the end of each month
- got approval from the executive committee to have François Trahan as Special Adviser to the executive committee after the AGM (when Margaret de Boer becomes the international liaison and there is no one in the past president position)
- organized and chaired the quarterly executive committee meetings, the ICRIS (International Committee of Representatives of Indexing Societies) meeting, and the annual general meeting, including calling for reports, writing reports, and creating agendas
- updated the annual letter to members with contact information and sent it to the membership secretary to send out

Awards and Bouquets

- chose Tamarack Award Winner, asked three people for testimonials, sent letter for translation, printed, and mailed it, and created a press release
- organized the thank-you list and wrote thank-you cards
- printed the Certificates of Recognition and mailed them

Committees/Meetings

I had meetings with most members of the executive committee and various other committees including the following: communications director, conference 2021 chair,

emeritus policy committee, Ewart-Daveluy Award, recording secretary, membership secretary, and TIDE (The Inclusion, Diversity, and Equity Committee).

In addition, I worked with the following committees more extensively:

Bulletin

I wrote a number of articles for the *Bulletin* including ones about the monthly video chats, what the Society is doing to promote indexing/indexers, and the Magpie Kudos. I also wrote the following for each issue: summaries of the executive committee meetings, president's remarks, and blurbs about volunteer positions.

ICRIS

I organized and chaired the informal ICRIS meeting on April 7, 2021, and scheduled the next informal meeting for Wednesday, September 29, 2021.

Translations

As a member of this committee, I met regularly with François Trahan and JoAnne Burek to discuss which pages and posts on the website should be translated and wrote reports.

Webinar Policy Committee

Again, as a member of this committee, I met regularly with Wendy Savage to work on the development of a webinar policy for ISC/SCI.

Regional Reps

The regional reps and I met several times to discuss various housekeeping activities and the monthly video chats and how to meet the needs of various constituents of the membership: the new versus the experienced and the national versus the regional.

Currently,

- the regional meetings have speakers, index critiques, specific topics
- the national meetings deal with the questions that arise, keeping lists of topics to discuss in case a topic doesn't arise at the meeting

However, since all the regions are meeting regularly now, it is a lot of work for the regional reps to have both a national and a regional meeting every month. We suggested that they alternate, starting in July 2021. For example,

| | |
|-----------|--|
| July | monthly video chat (on the second Saturday) |
| August | each region have their own meeting at their regular time |
| September | monthly video chat (on the second Wednesday) |
| October | each region have their own meeting at their regular time |

In addition, many of the members attending the monthly video chat are looking for how to begin a career as an indexer. This is not a topic needed for the more experienced indexers, who have not been as frequently to the monthly video chats.

An ad hoc committee will be compiling a list of resources including specific articles from the *Indexer*, various webinars from American Society for Indexing, JoAnne's marketing webinar, and so forth, and make these resources available to new indexers so that they get what they need without crowding out the experienced indexers. If there are gaps, then possibly the Society could commission specific webinars to cover those topics.

Documentation and Procedures

I am trying to get our procedures documents for each position so that the person coming in has something to begin with. I also worked on the position descriptions. This is an ongoing project . . . I hope to finish it in the coming year.

In addition, I also worked on the following documentation:

- worked on the executive committee procedures manual (Board Binder)
- worked with regional reps on admin tasks such as timekeeping, membership lists, reports in folders
- made generic documents for letter to Tamarack Award winner and press releases and announcements for the Ewart-Daveluy Award committee
- updated or formatted the following policies: Bulletin Policies and Procedures, Emeritus Membership Policy, International Travel Funding Policy
- updated the pre-AGM to-do list and added presidential duties
- updated the post-AGM checklist and posted for review

Magpie Kudos

This was an initiative that came from a member who mentioned that it would be nice to have a way for members to thank other members. We discussed this idea at several executive committee meetings and came up with a name and some parameters. JoAnne Burek (website administrator) set the Magpie Kudos form, I wrote up a blurb about it for the Bulletin, for posting to the website, and for sending out to the members by email. I will be interested to see how this works!

Volunteers

I found three new people to take positions on the executive committee: Julia White, membership secretary; Judith Clark, communications director; and Vicki Gregory, *Bulletin* editor.

I spoke about volunteering at the AGM, and at each regional meeting and national video chat that I attended over the past year. We now have five new volunteers (in addition to the new executive committee members): Jess Klaassen-Wright, social media coordinator; Wendy Savage, webinar development coordinator; Carlisle Froese, (recording secretary); Tere Mullin,

new coordinator for the Mary Newberry Mentorship Program; and Marco de Petrillo, who will help the Society develop a knowledge management plan.

Past President (Margaret de Boer)

I'm amazed at the dedicated volunteers who keep the wheels of ISC/SCI moving even while running their indexing business. Executive committee members offer comprehensive support to our members and they continually improve our member experience. I'm grateful to be part of this indexing community.

Book and Periodical Council

I continued in my role as Society representative for the Book and Periodical Council (BPC) for most of the year. A highlight this year was the virtual town hall with BPC members and Heritage MP Stephen Guibeault. The event was billed as an opportunity to share ideas with the Minister, on recovery measures that would ensure the publishing sector's economic recovery in response to the COVID-19 pandemic. It was an encouraging discussion among the BPC members and the Minister. This spring I handed over the BPC representative reins to Ronnie Seagren. Please see the latest issue of the Bulletin to read more about our work with the Book and Periodical Council (BPC).

Ewart-Daveluy Award

As liaison to the Ewart-Daveluy Award committee, I've been kept up to date on their hard work including an update on committee procedures and guidelines.

Membership (Julia White)

Since the last AGM report, membership numbers have risen to 124 from 108, representing a 14.8% increase. Excluding honorary memberships, the number of members has increased 11.4%.

Among the provinces, British Columbia and Quebec were tied for the largest absolute increase in members, with a rise of four members each.

In relative terms, the largest increases were seen in Saskatchewan and Nova Scotia, which both tripled their membership to three in 2021, up from one each in 2020.

Membership numbers in Manitoba and New Brunswick declined by one each.

Our international members are from Australia, the United Kingdom, and the United States.

| | May 2021 | May 2020 | May 2019 |
|------------------------------------|------------|------------|------------|
| Totals | 124 | 108 | 104 |
| Canada | 103 | 91 | 89 |
| International | 21 | 17 | 15 |
| <i>Paid Memberships</i> | | | |
| Basic Individual | 32 | 28 | 31 |
| Listed Individual | 72 | 67 | 62 |
| Student | 2 | 3 | 2 |
| Institutional | 11 | 7 | 7 |
| <i>Honorary Memberships</i> | | | |
| Emeritus | 3 | 3 | 2 |
| TIDE Bursary memberships | 4 | 0 | 0 |

This term, Lisa Fedorak was membership secretary until the summer of 2020, at which point Julia White transitioned into the membership secretary role.

This year the membership secretary

- Created a membership secretary manual and trained the incoming secretary (Lisa)
- Sent mass emails to members about Society events and programs
- Maintained the membership lists for the Society
- Maintained the isc-I and the executive list-servs
- Liaised with Society of Indexers (SI) regarding mail delivery, and digital access of the *Indexer*
- Assisted individual members with their queries, or forwarded those queries to the appropriate executive member

- Attended all executive meetings via Zoom
- Sat in on national members' video chats

Treasurer (JoAnne Burek)

Summary

In the fiscal year ending March 31, 2021, the Society generated a total income of \$18,109, of which \$2,060 was attributed to the 2021 conference, -\$218 to Conference 2020 refunds, and \$16,266 to operating revenues (membership fees, Find an Indexer fees, Ewart-Daveluy Award nominations, and mentorship program fees).

Total expenses were \$13,094 for ongoing operations plus \$574 for special projects, which includes expense claims for the TIDE bursary. In the ongoing operations expenses, we incurred \$8,115 for the *Indexer* subscriptions (\$7,627) and credit card fees (\$487) for membership payments. Another significant item was \$1100 for the ad we placed on the [program page](#) of the Congress of the Humanities conference website. The remaining large items include the *Bulletin* for \$735 and the website and listserv for \$935.

One type of expense that we did not incur was executive travel, international liaison travel to conferences, and the executive meeting conference room that we would normally have booked at the 2020 conference where we would meet in person. As a result of foregoing these expenses, we had a profit of \$5,014. After netting out the special project expenses of \$574 and the accrued interest of \$139, our net profit for the year of \$4,579.

The balance sheet remains strong with \$31,065 in cash and \$13,703 in investments, for total assets of \$45,359.

Budget

The proposed 2021–2022 budget, excluding conferences and extras such as bursaries, will result in an operating profit of \$3,756. Again, we are not counting on travel costs or in-person meetings except perhaps at a regional level.

Under Extraordinary and Special Projects costs, the executive committee voted unanimously for projects and activities amounting to \$7,190 for the year.

Highlights 2020–2021

First Quarter (April to June 2020): Compilation of fourth quarter and yearend 2019–2020 financial statements as well as 2020–2021 budget preparations. After the books were closed on March 31, I processed a few more remaining refunds of registration fees for the 2020 conference.

Second Quarter (July to September 2020): Preparation and posting on website of first quarter financial statements.

Third Quarter (October to December 2020): Preparation and posting on website of second quarter financial statements.

Fourth Quarter (January to March 2021): Preparation and posting on website of third quarter financial statements.

April and May 2021: Compilation of fourth quarter and yearend 2020–2021 financial statements and the 2021–2022 budget preparations. QuickBooks, our accounting software service, announced a 100% price increase with no incremental benefits to us. I found an alternative software, GnuCash (gncash.org) that is open source, widely used, and which also happens to facilitate the entry of credit card transactions—something that was not offered by the QuickBooks core program. The migration of the entire set of accounts and transactions, which goes back to 2015, from QuickBooks to GnuCash, is underway.

It was a pleasure to serve the members and the executive committee this year.

Thank-you for your support.

Communications (Judith Clark)

*Note: I replaced the previous communications director, who had to withdraw. I did not serve the entire year.

Diversity in Canadian Publishing Bursary

- Distributed information from committee per procedures to stake-holders, including membership, distribution list recipients, social media.

Ewart-Daveluy Indexing Award, 2021

- Distributed information from committee per procedures to stake-holders, including membership, distribution list recipients, social media.

ISC/SCI Annual Conference

- Announced upcoming ISC/SCI Annual Conference per procedures, including follow-up reminders on social media.

Word on the Street Toronto

- Announcement posted per procedures, including to social media.

Press Releases and Awards (General)

- Drafted multiple award templates (call for nominations, award announcements) which can be translated into French to cut down on time creating press releases and announcements and speed up the overall translation process.

- Met with Alex to discuss (among other topics) ways to improve process for communicating about awards with public.

Student Letter

- The student letter is now on the ISC/SCI website with a not-public URL: <https://indexers.ca/for-indexing-students/>. The email sent to instructors/coordinators will consist of a short introduction and a request to share the link with students. The target audience is indexing students, but also students in fields who may feel membership in an organization for indexers would be a good professional fit for their careers.
- I have created a spreadsheet to store addresses of recipients.

Editors Canada

- Coordinated with Michelle Ou at Editors Canada to add news from ISC/SCI to two to three of their monthly newsletters per year. I updated the communications task list to include the information from Editors Canada and also submitted news items for the newsletter.

Miscellaneous

- Updated distribution list
- Updated ISC/SCI Wikipedia page
- Created the communications director task list and documented procedures

British Columbia Region (Lisa Fedorak)

The first meeting since I took on the role took place in September and was an informal chat about what people would like from the chats. We set the last Wednesday of the month at 7pm Pacific time as the regular date to meet. We worked on the issue that one indexer was having with a recent index and brainstormed ways to tackle the challenge

- October: We were a small group and we tackled another indexer's challenges they were having. And as it was just before the US election, we ended the chat with some moral support for our US colleague.
- When telling the BC group about the change in the national meetings (moving to Wednesday afternoons in alternating months), some were disappointed at the early hour, as 3pm is quite early to be ending the work day and heading into a meeting.
- November: Only two members (Judi Gibbs and myself) met in November. It was fortuitous as I was having an indexing issue, so Judi and I had a one-on-one session about restructuring an index.

- December: New member Jean August (Vancouver) came to the group and asked Judi and I many questions about indexing as she has just finished the SFU course and Audrey was her instructor.
- January: Jean got to meet Audrey face to face. Audrey McLellan presented an index she had done for WorkSafe (BC's workers compensation group agency). It was an opportunity for us to discuss a non-book index, some terminology choices, and how to review an index. There was some interest from Ontario in the session, however the hour was too late for them.
- February: A great meeting that was a generalized discussion without a topic. We talked about people's schedules and how they have been impacted (or not) by COVID-19 and what might be coming down the road as things may start to be changing in the long term as COVID-19 continues as a member has had a regular client close down.
- March: We had an in-depth discussion about the differences between indented and run-in indexes with particular attention to subheadings. Judi Gibbs has mentioned that her indexes are different than others and she will present examples of what she means at the next meeting.
- April: We had our first non-BC attendee (Ronnie Seagren) and Matthew MacLellan, a Vancouver indexing student of Kari Kells who was checking out ISC/SCI (and later became a member). Judi Gibbs presented excerpts from three indexes that showed her approach to usability of indexes. We discussed moving the meeting to be in different week of the month as the Central Region meets in the 4th week and currently the Eastern region also meets in the 4th week. This makes attending other meetings difficult as there are so many in that week. Depending upon what the new Eastern rep decides to do, we may move to another day of the week.

Prairie and Northern Canada Region (Stephen Ullstrom)

The number of indexers in the prairie region has grown this last year, with several new indexers joining the Society. I have been pleasantly surprised at the enthusiasm for indexing.

New members have provided some impetus for trying new things. In December, we met and critiqued an index together for the first time, which was a positive experience. I also really appreciate Zoom for making it easier for our far-flung group to meet. That said, I struggled this year to organize regular meetings, which is entirely on me.

I anticipate stepping down this year as regional rep. I am grateful for the opportunity to serve in this position these last four years. A lot has happened and is happening, and it is an exciting time to be involved. I look forward to seeing the prairie region move forward under new leadership.

Central Region (Ronnie Seagren)

The Central Region has met almost monthly for the last year over Zoom on the fourth Saturday of the month. Our meetings usually range from about seven to fifteen members. This year we didn't meet during the summer because of lockdowns, though we thought seriously about meeting in a park.

In **October** we took a stab at indexing a chapter of an art catalogue for an exhibition on Juan Gris that Enid Zafran was indexing. She shared guidance on her approach and we had at it. It was a great chance to look at how to handle the life of the painter, works and exhibitions, and art movements. I wrote a detailed article on this meeting in the *Bulletin*.

The **November** meeting focused on problematic indexes. We were inspired by a review of a book that would have been substantially improved if it had had a good index. Because of a review we saw on the indexing list, we decided to start the discussion with two Dutch cookbooks that do nothing to make the recipes findable. This was the inspiration:

Influential public health intellectual Marion Nestle reviewed food writer [Harold McGee's new book](#) on her blog today. After Nestle calls *Nose Dive: A Field Guide to the World's Smells* (Penguin Press, 2020) "astonishing" and "life-changing" and "brilliantly designed with elegant charts, key terms in bold, and chemical structures (yes!) right next to the terms in miniature on a light grey background, set off from the text but right there where they are needed" - she then calls out the index and Penguin Press.

In **January**, 18 people met with Carla deSantis as she took us through the process of creating her Ewart-Daveluy Award-winning index. She wrote the scholarly index for Heather Bamford's *Cultures of the Fragment: Uses of the Iberian Manuscript, 1100-1600*. It was actually the second index she'd ever done, and really special.

The meeting had three parts. First, Carla walked us through the index, focusing on the issues she had to figure out. Language and names presented particular challenges, with fictional names, names without surnames, double surnames, and so on. Names of works, poems, and fragments had to be handled consistently, when they didn't all have the same information. The metatopic of "fragmentation" into three main headings: "fragmentary works," "fragmentation," and the "fragments" themselves. Likewise, because she was limited to two heading levels, she added several other main headings besides "manuscripts": "manuscript context," "manuscript culture," "manuscript disuse," and "manuscript production and circulation." She explained what she had to deal with to define cross-references.

Then we looked at the [criteria for the award](#) to see how her index met each of those points. And finally, Carla took us through a couple of pages, showing how her approach worked with the text. It was clear that both subject knowledge and some languages were extremely helpful in this project. For example, she knew to include "shelf marks" with abbreviations for the libraries where the fragments are held.

Our three most recent meetings started with seed questions about our indexing practice as a conscious effort to make the meetings useful for experienced indexers as well as newer

people. In **February** we shared our latest indexes and the challenges we faced and what we learned from them. Highlights of the discussion included dealing with unreasonable length expectations, colour-coding while indexing, and the difficulty many indexing students have in understanding the difference between *see* and *see also* entries. In **March** we focused on our experiences collaborating with publishers, editors and authors, and there were lots of stories. We also dove deep into run-in versus indented indexes. **April's** meeting took a deep look at how we edit our indexes, and I will write this one up as a *Bulletin* article.

Eastern Region (Jason Begy)

Regional activity was minimal over the summer of 2020 due to the pandemic and my own health issues.

In November of 2020, I established monthly Zoom meetings for the region. These are held on the fourth Wednesday of the month at 7pm EST (Montréal time).

Our first such meeting was on November 25, 2020, and took the form of an index critique. Attendance was quite good, with around twelve people showing-up. In December we skipped the meeting as it fell on the twenty-third, at which point I and many other members were already on holiday. We held another index critique on January 27, 2021, which was sparsely attended, with only four members. The discussion was quite productive, however.

We have had subsequent meetings on February 24, March 24, and April 28, 2021. Attendance has been good, with generally six to eight members in attendance. In May we will not meet due to the conference.

The majority of these meetings have been index critiques, which have generated a lot of positive and helpful discussion. They are good opportunities to not only give specific and individual feedback but also to compare habits and best practices. The meeting in March was slightly different in that we first discussed a document I wrote advising authors on how to review indexes, and then we had a good discussion on time management and scheduling.

I have also been working on administrative tasks, such as updating membership lists and procedure documentation.

Bulletin (Vicki Gregory)

In July 2020, I took over the *Bulletin* editor position from Catherine Plear. I learned the ropes with that first issue and then quite soon after completed issue two and three—all within a five-month period!

As of this report, the spring issue has gone out successfully and things are in the works for the next issue. Contributors are lined up to write conference summary articles, which will be the major focus of the summer issue, along with the AGM, and more awesome content.

I'm really happy with the writers and volunteers who do so much to make the *Bulletin* possible. I will continue to work on streamlining the process.

Time Tracking, Procedure, Workflow

- Time tracking continues with Toggl, and I'm endeavouring to improve my procedures with each issue.
- My "Bulletin Steps" file gets a review and tweaks with each issue with an eye to an easy transition for anyone new to the role in the future.
- I'm continuing to work on a file with a breakdown of issue specific content. For example, Ewart-Daveluy Award blurb should be in the winter issue.

Graphics and Article Size

- I've implemented a wordcount for articles to range from a few paragraphs to up to 1500 words. I'll note whether this guideline works for contributors.
- Graphics recommendations are given to contributors as needed. I pre-emptively check the properties of a picture before sending to Sergey. Resolution needs to be at least 300dpi; filetype either PNG or GIF; sent separately instead of embedding in an article.

Article Acquisition

- I've had a lot of positive response from people that I've approached for articles and often members come forward with ideas—all that to say I'm not concerned with article acquisition! I welcome ideas for future issues.

Website Administration (JoAnne Burek)

This report includes activities of both website administration and website maintenance and enhancements.

Membership Six-Month Trial

We added a basic six-month trial membership that is offered only to runners-up to the bursary program. The trial membership does not include access to *The Indexer*, but it does give the user access to everything on the website that is available to logged-in members.

Calendar of Events

We are making greater use of the website calendar and exploiting its capabilities. An example: we now have the link to members-only Zoom meetings right in the calendar entry—but it's visible only if you are logged in.

Bilingual Enhancements

As a member on the translations committee, I worked with Alexandra Peace and François Trahan to implement changes and enhancements to make our website even more bilingual.

We upgraded our multilingual software so that we can provide a more seamless website experience for French-language users, to a level that matches the experience on the English-

language side. Maintaining this upgrade adds some overhead, as we have to duplicate every new page, post, or calendar event, even those that are not translated. However, we think the ease of use is well worth it.

Magpie Kudos

A new form was added to allow members to send thank-you emails to other members.

Zoom for Meetings

It has been a year since we adopted Zoom, and now it's baked in to how we operate. Our executive and committee chairs regularly hold fifteen to twenty meetings a month. These meetings include every type, from small one-on-one chats to committee meetings, study groups, and webinars. Overall, Zoom has been a great help to our communications.

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

This has been a quiet year due to Covid-19. All in-person conferences were cancelled so there were no informal meetings until 7 April 2021. The Triennial of October 2021 was also postponed by one year.

The Indexer

The contract for the publication of the *Indexer* is between Liverpool University Press (LUP) and the Society of Indexers (SI), but the journal is published on behalf of all the societies and networks that are signatories to the International Agreement. LUP have proposed some revisions to the contract, but before proceeding further we were asked for feedback on a few questions, mostly about access to the journal by non-subscribers. The main change was to make all content available at a cost. The ISC/SCI executive was not in favour of this, preferring to keep open access to anyone, similar to most other indexing societies. In the end, LUP agreed to keep open access beyond five years.

ICRIS Informal Meeting Online

There have been no informal meetings since the UK conference in the fall of 2019, and none planned until in-person conferences next year. With such a huge gap, Alex impressed on all of us the importance of the global connection for ISC/SCI members and all other indexers.

ISC/SCI hosted an online meeting on 7 April 2021. Members of all but one society showed up (NIN, DNI, CSI, ASAIB, ANZSI, SI, ASI and ISC/SCI), plus Maureen MacGlashan. We were fourteen people in total. Each society spent ten minutes speaking about the same set of topics, then we asked questions to each representative. It was a successful meeting; everyone seems to have enjoyed seeing each other and hearing about indexing in different parts of the world.

The next meeting is planned for late September 2021. This will be hosted by the ISC/SCI again, but next spring there will be a different host.

The minutes and list of attendees are on [ICRIS website](#), along with an additional [report from the China Society of Indexers](#) (CSI).

ISC/SCI Online Conference 2021

One representative of every other indexing society has been invited to join us. At the time of writing this report, representatives from ASAIB, ASI, CSI, DNI, NIN, and SI will be attending.

Archive Committee (Chair: Christine Jacobs)

Completed

Intern Nathalie Malaket finished her hours. She did a complete weeding of duplicates and obvious peripheral material and we are down to 5 banker boxes of papers. The boxes are now stored in Christine Jacobs home.

The following have been deposited in the ISC Archives Dropbox:

- scans of the Bulletins 1:1 (1978)– 41:1 (2019)
- list of Society officers 1977–2016 (Int’l Liaison not included)
- seven bibliographies produced and circulated by IASC – perhaps of historical interest, but scanned and kept for the moment – File: Miscellaneous publications

The pandemic has intervened in that Christine has had little time to give to the project, even at the organizing level, and it was not possible to have a student intern work on a draft retention schedule or scanning.

Moving Forward

Christine Jacobs has begun the job of weeding correspondence that is not directly related to the history or business of ISC/SCI.

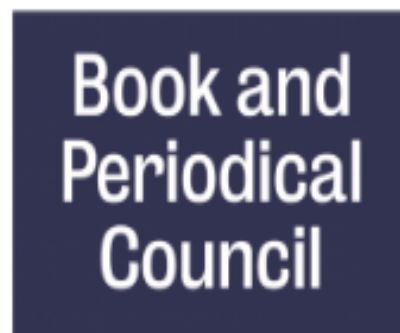
Development of a draft retention schedule and procedures begun, so that we have a document to start retention discussions within the committee (winter 2022 if possible to arrange an intern).

The committee is now contacting former executive committee members in case they have boxes stored under their beds or in the recesses of their computers.

Carlisle Froese
Christine Jacobs (Chair)
Gillian Watts
Siusan Moffat
Nathalie Malaket (intern)

Book and Periodical Council (Representative: Ronnie Seagren)

The Book and Periodical Council is the umbrella organization for Canadian associations that are or whose members are primarily involved with the writing, editing, indexing, translating, publishing, producing, distributing, lending, marketing, reading, and selling of written words.



ISC/SCI belongs to the council to raise the profile of indexing and as a way to keep tabs on general trends in publishing. You can see a list of members from all aspects of publishing in Canada at their website at <https://www.thebpc.ca/>.

Margaret attended the meetings of the Book & Periodical Council in October. Ronnie was at their AGM in December, and they both were part of the April meeting. Here are some highlights from the year. If you are interested in any particulars, please check the BPC website or ask Ronnie.

A Forum to Share Information and Answer Questions

The BPC provides us with the contacts to answer questions that are important to us, such as: Who owns the copyright before an index has been paid for? (Answer: the indexer.) Several groups explained their involvement with advocacy with the government for support of the industry, about the pending Simon & Schuster sale, and in technical copyright consultations.

Discussions over the year have included the impact of COVID and CERB, the use of Zoom, types of virtual conferences, office insurance costs. Other conversations concerned office collaboration software, how to effectively diversify Boards, the possibility of a shared calendar of professional development opportunities (including a repetition of the Publishing 101 series), and Book Manager software that offers a user-friendly view of book metadata.

Diversity and Inclusion Strategies

Several organizations are specifically working on a variety of strategies for their Boards and membership. It looks as if we were quite early on this one with the bursary. Starting this spring Editors Canada started offering up to three Equity Fellowships a year to support editors who have traditionally been excluded by the publishing and editing industries, including editors who are BIPOC, 2SLGBTQIA+, neurodiverse and disabled.

The Association of Canadian Publishers is offering subsidies for publishing organizations and Boards to do anti-racism and equity training internally. The Writers Union is offering mentorship and other resources, and BookNet is broadening their approach to metadata for books. They've also created a database of publishing freelancers from diverse communities.

Updating our Profile on the BPC Website

Judith and Ronnie are working on updating our presence on the BPC website, including the page for the society and the awards we offer.

Conference 2021 (Chair: Lisa Fedorak)

The committee started meeting late in September 2020 and easily chose to go with a virtual conference due to the uncertainty of the pandemic.

Presenters previously programmed for the cancelled 2020 conference were contacted and a number were still interested and available for the 2021 conference dates May 27–29, 2021. A large number returned leaving a few slots to be filled in. As planning continued, it became apparent that we needed to ensure we provide adequate time for breaks due to the intensity of Zoom meetings. An extra day was added. Additionally, early in planning providing networking opportunities was a priority as recent feedback on the conferences had identified networking as a key reason for attending conferences. Small break-out rooms based on a topic for discussion and speed networking sessions were included to help people connect or reconnect with their peers as well as a quiz based on trivia submitted by participants to continue the ISC/SCI tradition of fun activities.

This year we introduced Fireside Chats for new indexers in the early stages of their career. New indexers have a need for specific information about starting their business and other topics that wouldn't be of interest to the established indexers at a conference. A chat with a senior indexer in a small group provides the opportunity to ask questions and network with other indexers in a similar stage of their career. Margaret de Boer and Stephen Ullstrom were invited to host sessions with groups of ten to fifteen registrants at a time.

As of May 17, we have over 105 registrants from Canada, the US, UK, Australia, South Africa, Egypt, Netherlands, Germany, Switzerland, France, and China.

JoAnne Burek (Publicity)
Lisa Fedorak (chair)
Maggie Billard Cosgrave (Programming)
Moirra Calder (member at large)
Nancy Wills (registration)
Ronnie Seagren (member at large)

The committee would like to thank Alexandra Peace, for sharing her valuable insights from the virtual conferences she attended during the year and for designing the conference program.

Ewart-Daveluy Award Panel (Chairs: Judy Dunlop and Mary Newberry)

Submissions for 2021 Award

This year we were pleased to receive a reasonable number of indexes. Up to three runners-up gained from detailed feedback on their indexes. Kate Mertes, an experienced reviewer and member of ISC/SCI, joined the committee as a guest reviewer and gave us valuable insights.

Presentation of 2021 Award

Presentation will be made by Zoom at the conference and entered into the minutes of the ISC/SCI 2021 AGM. Award winners are usually given two complimentary banquet tickets. When we hold our next in-person banquet, we will provide tickets to the winners from 2020 and 2021. Congratulations to the winner will include our website announcement, a letter to the publisher, articles in our *Bulletin* (English and French) and an article in the *Indexer*.

Panel of Award Winners: “The Road to the Ewart-Daveluy Award”

On Saturday, May 29, our virtual conference will include a panel of award winners: Mary Newberry, Audrey McClellan, Carla DeSantis, François Trahan, Anna Olivier, and Judy Dunlop, with Christine Jacobs as moderator.

Committee Members

Mary Newberry kindly agreed to co-chair with Judy Dunlop during 2020–2021 to help her with the transition. Additional members during 2020–2021 were Noeline Bridge, who has generously supported the committee for a number of years, and Audrey McClellan, who will become chair of the 2022–2023 committee. François Trahan, a previous award winner, will join the 2021–2022 committee. Kate Mertes was our first guest reviewer, and we hope to invite another guest to assist with the 2022 award.

Things of Note

- Application deadline was March 20, 2021.
- We accepted books published in 2019 or 2020.
- Submission requirements were changed so that we now prefer the book to be submitted as a PDF rather than a hard copy. Hard copies will be accepted if the PDF is not available.

Mary Newberry Mentorship Program (Chair: Stephen Ullstrom)

This last year has been about transition and holding steady. Linda Christian finished her term as coordinator last year and stepped down in May 2020. I agreed to take over as interim coordinator, with the goal to find new coordinators to replace me. I did not expect it to take a full year to find someone, but here we are and the program has continued nonetheless.

I have processed four applications this last year, one of which was originally received by Linda. This has resulted in two mentorships currently underway (including one pair who matched themselves but wanted to be under the umbrella of the program) while two applicants ultimately decided not to commit to mentorship at this time. One pre-existing partnership decided to extend mentorship by a few months, as they had to pause due to unforeseen circumstances, and, as of writing, I also just received a new application. I have also had discussions with two new indexers who are likely to apply, but haven't yet.

Overall, I think we've had slightly fewer applications this year than in the first couple of years, but the program does seem to be meeting a need among new indexers who are intent on building a freelancing business. I also have not marketed the program this year (though Vicki Gregory very thoughtfully spearheaded an article for the *Bulletin* (vol. 43, no. 1)). Going forward, more promotion may result in more applications.

Documentation and forms are currently being updated. As part of a website review led by Alex Peace, we are redoing the program information on the website, which will include French translations. I also want to make a few small updates to the application documents. This is ongoing.

The program also has a new coordinator. Tere Mullin has volunteered and will take over after the AGM. Tere has herself been through the program as a mentee, and I believe that she will do an excellent job taking the program forward.

There is still space for a second coordinator to work with Tere, if anyone else is interested. Please contact Tere or Alex Peace if you are.

To close, I want to thank Linda Christian for her hard work in the early years starting and running this program. I am grateful for her leadership and vision. I have also seen how mentorship has made a difference in the lives and careers of some of our new indexers, and I think it has also been a good experience for some of our mentors, to share their knowledge and to connect with newcomers. This may be a small program only serving a few people a year, but I think the impact will be long-lasting as participants become established indexers, as I believe some will become. I am thankful for the support from the executive and the Society at large, and I look forward to seeing how the program continues to grow.

Outreach Committee (Chair: Siusan Moffatt)

TIDE (The Inclusion, Diversity and Equity Committee)

This committee has had a few huge successes in the past year.

In June, we chose a recipient for the 2020 Diversity in Canadian Publishing award that offers support to under-represented people who are interested in becoming indexers. Sandra Mucchekeza from Edmonton was our 2020 winner. Originally from Kenya, she's no stranger to publishing, having published several children's books. Sandra is currently working on her first paid index. Three runners-up received six-month trial memberships.

In 2021, TIDE awarded the Bursary to Nicole Riguidel, a Métis woman from Paradise Hill, Saskatchewan. She completed a Bachelor of Science in Animal Bioscience and worked as a veterinary technician. Nicole recently graduated with a diploma in Library and Information Technology and currently works as a library technician in Saskatoon, Saskatchewan. Two runners-up received six-month trial memberships.

In addition, we offered various supports to the people involved in the first year of the bursary and surveyed them about their experience so far. We wrote a sixteen-page summary of efforts to date.

TIDE also hosted a very successful webinar in June 2020! Indexer, author, and professor Paula Butler presented “Caring about Equity, Diversity and Representation: A Conversation on Ethical Dilemmas and Best Practices for members of the Indexing Society of Canada” to a Zoom group of over thirty-five participants in June. This was ISC/SCI’s first participatory webinar, and we were delighted how smoothly it went. You can find the presentation and an initial list of resources at <https://indexers.ca/resources/news-and-articles/caring-about-equity-diversity-and-representation/>.

Publishers Outreach

Judith Clark (our communications director as well!) has taken up the torch that Judi Gibbs started for us in early 2020 of sending letters to Canadian publishers, letting them know about ISC/SCI and our Find an Indexer listings. Judith sent out the second batch of letters in early spring of this year.

The 2021 publishers’ letter was sent in April. Though planned for March, a delay in bookmark procurement bumped the send date into April.

Users and Usability

This group is interested in doing a usability study of readers’ behaviour with indexes, though we haven’t been able to tackle this yet. We know that it’s necessary to find many ways to encourage publishers to include linked and usable indexes in online material, especially as more and more nonfiction books are being published with minimal indexes or even no index at all. Often when there is one, the ebook just reproduces the print index.

One idea is to do an observational study of the findability of information in online material. For example, we could measure the time it takes participants to find specific information in PDFs and ebooks using search / Ctrl+F or an index. If you are interested in exploring this area or if you have other ideas about what needs to be explored, please contact Ronnie Seagren (ronnie.seagren@gmail.com).

Community Outreach

Toronto’s Word on the Street was very different this year because of COVID, but they held their first-ever virtual festival in September. Due to the organization of Ann Kennedy and Ronnie Seagren, we were able to participate with an online Digital Marketplace page about our services and a “Digital Soapbox” interview with ISC/SCI member Gillian Watts! You can see it [on Instagram](#).

On a different front, Emily LeGrand’s presentation for academic authors to introduce them to indexing skills and ISC/SCI is under review. We have always contemplated reaching out to institutions to familiarize them with our society and proper indexing techniques. Emily’s webinar will help both authors who index their own books and ISC/SCI indexers working with academic authors.

Technology and Skills

Society of Technical Communications (STC) would be a great sister society to ISC. We have many of the same skills and both organizations know the importance of indexes! In the near future, we will be reaching out and dialoging about how we might be able to work together. If you are a member of STC as well, please get in touch with Siusan Moffat (siusanmoffat@gmail.com).

Survey Committee (Chair: Lisa Fedorak)

This new committee started as an ad hoc committee with Martin Gavin, and later, Jean August. However, the committee ended up recommending that a general membership survey become an annual undertaken so as to provide members with another opportunity to give feedback. Thus, a permanent committee was born.

We met regularly over the past year and made the following recommendations to the executive committee:

- Two surveys to be developed and sent to the membership: one regarding ISC/SCI memberships (membership survey) and the other regarding indexing rates (rates survey).
- The membership survey be done before the rates survey to gather information to see if there are ways the Society could serve the membership better during the pandemic, and because the rate survey will require more time to develop useful questions.
- The rates survey to contain questions from the previous ISC/SCI survey to allow for comparisons over time.
- The rate survey to be undertaken every five years with a core set of questions each time to allow for comparisons.
- The survey results should be made available to the general public, but should be posted in the members-only section. A brief summary should be noted in the *Bulletin*.
- At membership renewal time, the email reminders sent to members could mention that this is a good time check your paid listing, if you have one, to ensure it best reflects your skills and experience.
- Recommendations specific to questions on the general membership survey are listed below.

We then updated or created the following:

- a general membership survey

- a plan for the membership survey to be undertaken every year
- a rates survey based on the 2008 survey and updated
- a plan for the rates survey to be undertaken every five years

Rates Survey Frequency

- 2021– 2022 fiscal year Rate Survey (Began in 2020–2021)
- 2026 – 2027 fiscal year Rate Survey
- 2031 – 2032 fiscal year Rate Survey

General Membership Surveys and Their Frequencies

The committee developed a plan for the membership survey to be undertaken annually each fall based on a schedule of alternating The Very Short Survey (two to three questions) and The Brief Survey (ten to fifteen questions) with The Long Survey given every five years. The Long Survey will be based on the survey sent out in 2020. The Very Short Survey will help alert the executive committee to shifts in satisfaction and give members an opportunity to voice concerns or kudos. An annual survey also invites people to participate.

- 2020 – The Long Survey
- 2021 – The Very Short Survey
- 2022 – The Brief Survey
- 2023 – The Very Short Survey
- 2023 – The Brief Survey
- 2024 – The Long Survey

The Very Short Survey

This survey will ask the following questions:

- On a scale of 1–10 how happy the members are with their membership in ISC/SCI
- Tell us what we do not know

The Brief Survey

The Brief Survey asks the same questions as above as well as touching on key areas of the Long Survey without diving too deep.

The Long Survey

The Long Survey is based on the current survey with the following changes:

- Satisfaction: on a scale of 1–10 how happy the members are with their membership in ISC/SCI
- Training: rephrase to focus on the main formal training one has, allow only one response, include USDA and library school training as options

- Work Hours: add option for organization members who do not index
- Software: include two options for Word, using Word to index and using Word for non-indexing features; ask what PDF software people use, paid vs unpaid versions
- Main clients or employer: specify freelance editors
- Volunteer: this question does not need to be asked in the future

The results of the general membership survey from 2020 are available on the [website](#). We appreciated the extra comments but did not publish them for all to see.

Some highlights from this survey are as follows:

- About 25% of the respondents were busier than usual, but about 35% had experienced some slippage of dates.
- Many of us had experienced some difficulties arising from the pandemic, whether it was from others working in the home, with concentration, or not being able to work in our usual outside-the-home places.
- Many people commented that the monthly video chats are extremely helpful in feeling connected, when asked what the Society could do to help members with difficulties arising from the pandemic.
- It was interesting to see the large number of ways that people had obtained indexing training! Some of the comments mentioned Editors Canada workshops, library school, and the USDA course.
- For 35% of the respondents, indexing is a full-time job. Another ~37% responded that indexing was a part-time job, some with other work to make it full time.
- Most of our members (almost 70%) use CINDEX, with SKY being used by ~23%, and MACREX by ~6%. It was surprising to see that only about 11% of the respondents use Megabit Macros. Along those lines . . . most people are on a PC (~77%), and about 30% use a Mac.
- There was a full range of number of years that respondents had been working as indexers for pay . . . except for three years. No one responded with that number!
- More respondents (~70%) had completed more than twenty indexes, and about 30% had completed less.
- Over 80% of the respondents work on scholarly books. About 50% work on biographies and memoirs, and about 45% work on trade monographs. Policies

and procedures were the item most reports as indexed other than books (~30%).

- Arts and humanities and social sciences were the top two subject areas, while technology and science were the least. Presses were the top main clients (~77%).
- It seemed like there were lots of reasons to continue being a member, but of course, there is room for improvement, and the respondents made some suggestions.
- It was heartwarming to know that 100% of the respondents were aware that the Society is completely run by volunteers. Of the respondents, ~70% had volunteered for the Society. AMAZING!!
- Most respondents (almost 80%) had attended a professional development event over the past two years.
- Many respondents responded to the questions about the conference with some good suggestions . . . come to the next one to see what they were!

The rates survey went out in April/May 2021, and the results have not arrived in time to discuss in this annual report, but we hope to tell you some highlights at the annual general meeting.

Jean August
Lisa Fedorak (chair)
Martin Gavin

Ad Hoc Emeritus Membership Policy Committee (Chair: Margaret de Boer)

Last year with Jason Begy and Lisa Fedorak we worked on the development of an Emeritus Membership. We're pleased to report that later this spring at the AGM we'll be presenting this distinction to the first group of long-time members.

Ad Hoc Succession Committee (Chair: Margaret de Boer)

It's an election year for our Society and that means our Society strikes a Succession Committee to solicit ISC/SCI members to stand for nomination for our executive committee for the next two years. This past winter Jason Begy and I began our work. We were pleased with our responses as we were able to fill nominations for the open positions on the executive committee within a few short months.

Ad Hoc Translations Policy Committee (Chair: Alexandra Peace)

Background

At the executive committee meeting on May 23, 2019, a translation policy was brought for approval. It mostly dealt with the procedure and contents for the *Bulletin*. The executive committee asked for a re-evaluation and consideration of the translation needed for the website. A new committee was formed, consisting of François Trahan, JoAnne Burek, and Alexandra Peace.

Some notes from our first meeting included the dilemma of whether the association should be truly bilingual and how to proceed. We decided to do the following:

- examine exactly what has been translated
- make a list of suggestions on what should be translated
- get a quote on translation cost
- bring this request to the executive committee

JoAnne very helpfully provided a comprehensive list of all the pages and posts on the website.

We have been meeting since then.

Currently

We spend each meeting working our way down the list of pages and posts from the website and examining each item to see whether any portion of it had been translated and if not, whether it should be.

We suggest that if a service is or can be offered in French, then the documentation about that service should also be available in French.

Therefore, we recommend that the Society contract a translator for the pages below (with the corresponding estimate of words and fees). We asked for a bit more money in case we find a few things here and there.

Future

The committee (after approval at the budget meeting on April 17, 2021) will contract to have the pages below translated. The web administrator will load the translated pages onto the website.

The committee will continue to meet for a short time after the translations have been added to the website to do the following:

- check over the website one more time for any stray translations that may be needed

- fill out the section of the draft translation policy that deals with the website and bring the policy to the executive committee for approval

We will then have completed our tasks and will disband.

| Page | Number of Words | Total Amount (\$) |
|--|------------------------|--------------------------|
| TIDE | 864 | 138.24 |
| Diversity Bursary 2020 | 364 | 58.24 |
| Diversity Bursary 2021 | 364 | 58.24 |
| announcement of new executive committee | 200 | 32.00 |
| membership dashboard, with titles and intro paragraphs | 200 | 32.00 |
| Mary Newberry Mentorship page (333 + 565) | 898 | 143.68 |
| privacy policy | 1458 | 233.28 |
| subtotal | 4348 | 695.68 |
| taxes (13%) | | 90.44 |
| Totals | | \$786.12 |

Indexing Standards (Ronnie Seagren)

NISO Indexing Standard

The National Information Standards Organization is in the process of publishing a new standard from 1997. Pilar Wyman and Judi Gibbs helped organize the writing. In the ISC

conference in May, they explained the standard, NISO Z39.4-202X. You can [read a draft](#) of the sixty-seven-page indexing standard, which replaces the previous the NISO site and [see comments there](#) as well; Ronnie Seagren did a careful review of the draft. Contributors to the standard include indexers, catalogue librarians, abstract creators, metadata analysts, and taxonomists, and it covers all kinds of indexes, whether displayed (as in a book or web application) or used in an online information retrieval mechanism. Even though its scope is broader than authored back-of-the-book indexes, it is of great interest to us.

Here's the draft abstract of the standard:

This standard provides guidelines for the content, organization, and presentation of indexes used for the retrieval of documents and parts of documents. It deals with the principles of indexing regardless of the type of material indexed, the indexing method used, the medium of the index, or the method of presentation for searching. It emphasizes three processes essential for all indexes: comprehensive design, vocabulary management, and syntax.

W3 Locator Standard for EPUBs

Ronnie is also contributing to the work on a W3C (Open Web Platform) standard for locators in EPUBs, along with Pilar Wyman of the US and Mary Coe of Australia. In an ebook what should an index entry link to after the indexer has embedded it in Word or InDesign?

ASI's Digital Trends Task Force created guidelines in 2012 that were never implemented by ereader companies. Current ebooks use various approaches to making an index work, from using page numbers to made-up locators to print-like, unlinked indexes.

So far the task force has put together a series of use cases for situations where locators are needed, including indexes but also references to specific content, such as in teaching situations and book clubs. We are investigating the use of arbitrary page numbers as well as CFI syntax that could be used by indexing software and ereaders under the covers. It's not an easy problem to solve. It looks as if the product will be a "note" to the W3C standard, which, when two ereaders adopt it, could become the new W3 standard.