

## **ISC/SCI Executive Meeting Minutes**

**Saturday, May 8, 2021, 2 p.m. EDT**

### **1. Welcome (Alexandra Peace) and Roll Call (recording secretary Carlisle Froese)**

In Attendance: Alexandra Peace, JoAnne Burek, Margaret de Boer, Liese Achtzehner (guest), Tere Mullin (guest), Stephen Ullstrom, Jason Begy, Lisa Fedorak, Vicki Gregory, François Trahan, Ronnie Seagren, Judith Clarke, and Julia White.

Called to order by Alexandra Peace at 2:07 EST. Opened with remarks about the upcoming thank you cards from the president. There are 40 going out, which shows that a significant part of membership volunteers.

### **2. Approval of Agenda**

Stephen moved to approve. Seconded by Julia. All in favour. Motion carried. Agenda approved.

### **3. Approval of Minutes (February 6 and April 17, 2021, Executive Meetings)**

JoAnne moved to approve the February meeting minutes. Ronnie seconded. All in favour. Motion carried. Lisa moved to accept the minutes from the April budget meeting. Seconded by Vicki. All in favour. Motion carried.

### **4. Consent Agenda**

Vicki moved to accept the reports from consent agenda. Stephen seconded. All in favour. Motion carried.

#### **Regional Updates**

- a) Central Canada | Centre du Canada (Ronnie Seagren)
- b) Prairies and Northern Canada | Prairies et Nord du Canada (Stephen Ullstrom)
- c) British Columbia | Colombie-Britannique (Lisa Fedorak)
- d) Eastern Canada | Est du Canada (Jason Begy)

## **Committee Reports**

- a) Archives (Alexandra Peace for Christine Jacobs, no report)
- b) Awards (Margaret de Boer for Judy Dunlop)
- c) Book and Periodical Council (Ronnie Seagren, no report)
- d) Bulletin (Vicki Gregory)
- e) Past President/Emeritus Committee (Margaret de Boer)
- f) Conference 2021 (Lisa Fedorak)
- g) Finances (JoAnne Burek, no report)
- h) Outreach (Ronnie Seagren for Siusan Moffat, Diversity Bursary report below)
- i) International Liaison (François Trahan)
- j) Membership (Julia White)
- k) Mentorship (Stephen Ullstrom)
- l) Special Projects (Alexandra Peace, no report)
- m) Survey Committee (Lisa Fedorak)
- n) Translation Committee (Alexandra Peace)
- o) Web Administration (JoAnne Burek)
- p) Webinar Program Development (Alexandra Peace for Wendy Savage)

## **Other Reports**

- q) Gwich'in Elders Workshop (Stephen Ullstrom)

## **5. Items for Discussion**

- a) President's Report (Alexandra Peace). See report.
  - i. AGM checklist

Alex asked if everyone had reviewed the post AGM checklist. She asked that everyone that is named in there make a comment saying that they had read it and approved it as is or comment with any changes. At the time of the meeting, Alex said that she had no comments from anyone on the document. All of these procedures will be going into individual procedure packets to help ensure a smooth transition. Margaret asked for a deadline for this. Alex said for the people whose positions are changing (president, book and periodical council representative, international liaison, regional representatives, and website administrator) as soon as possible, this week. The rest within the next two weeks. Ronnie asked to confirm that it was the post AGM activities list, Alex confirmed.

JoAnne asked how to make these comments. Alex said track changes over the original documents, even just a comment that says I have looked at this and I am ok with it.

ii. Article for review

Alex wrote an article about what the ISC/SCI is doing to promote indexing in Canada. She asked for two volunteers to review it. Ronnie and François volunteered to look at it and write comments. The article is in the For Review file.

iii. national video meetings

Alex has been meeting with the regional representatives for about six months, discussing the various dynamics of their work and roles to get ready for transition and to make sure the role works for everyone.

The representatives want to address the needs of the new indexers without boring the experienced ones at the meetings. This will make sure that no one gets frightened away. The meetings should be accessible to all members. It is also important to balance how much work the reps are doing (they were being asked to meet seven times a year).

The suggestion that came out of these meetings was that the national chats and regional meetings get moved from monthly to every other month so that one meeting happens a month on an opposing schedule. This means that there will be one meeting a month for members.

Alex asked if there were any concerns or questions. Judith said that this was a great idea. Tere asked to clarify that this meant that there would be a national meeting every other month and a regional meeting every other month, so that there is a meeting every month. This was confirmed. Lisa said that reps have been expanding to invite people from different regions to attend other regional meetings and asked if this was going to continue. Alex said yes this would continue but suggested that meetings not be changed to address needs of other meetings or regions.

Lisa wondered if there was a way to stagger regional meetings to make it easier for members to predict when meetings are happening to attend as they can. She added that this would be a good discussion for another time. Alex said that she will be calling a meeting for the reps the week after the AGM to discuss staggering and scheduling the meetings.

Ronnie asked if, with this change, the national meetings would still alternate Wednesday/Saturday. Alex said that this practice should continue until the ISC/SCI finds out that it does not work for people.

The other issue Alex brought up around the meetings was that, every once in a while, the national meetings get taken over by new indexers asking basic questions. There is a concern that this will scare off the more experienced indexers. A suggestion has been put forward that the ISC/SCI should address these questions by putting together resources as a package so that newer or curious indexers have this to turn to. JoAnne thought that this was a great idea. Alex if there was anyone that would like to be on an ad hoc committee to develop this.

JoAnne, Tere, and Julia said that they would like to be on this committee. Julia was asked to be the chair and agreed to do this. Alex asked if anyone had any ideas that should be included in this package that had not been addressed in the report. JoAnne suggested focusing more on how to get a job rather than how to write an index, but it could be helpful to add a list of resources to the package so people can educate themselves further. Margaret suggested that it would be good to include information on educational options. JoAnne said that it would be a good idea to drill down on what level of newness that this would address.

#### iv. AGM agenda

Alex said that the AGM agenda needs to be created soon. She started with the fact that the new executive needs to be voted on. Alex asked if there was anything else that people wanted to discuss at the AGM? Margaret asked if this was where the first presentation of the emeritus would be happening. Lisa said yes. Lisa added that the membership survey should be on the AGM agenda. Alex asked Ronnie if anyone from the outreach committee wanted to talk. Ronnie said probably, and that she would find someone. Alex said that Vicki could have a few minutes to talk about *The Bulletin* if she wanted. Vicki said that she could do that. Alex asked François if he wanted to talk about the ICRIS meeting. He said yes. Alex mentioned that this ICRIS meeting had been spectacular.

#### b) Communications (Judith Clark) See report.

Judith brought forward one discussion item. Looking to update the BPC information, Judith realised that the email addresses that are being given out to reach out to the

ISC/SCI in different capacities are not consistent or even go places that are not traceable. Judith suggested that a general information email would be a good idea, going forward. The ASI does this. Right now, the ISC/SCI has a generic form for contact. Going forward, Judith thought that it would be a good idea that this form go to the general information email which will go to communications who can either answer or send it to the person who can address the issue. The general information email could also be used for when the ISC/SCI appears on other pages and people want to contact the society from there.

Judith said that there are a lot of emails right now, so the ISC/SCI should be careful how many are out there. Judith was trying to create or find a list of every single email that works and was not sure that she was successful. There was one that she found that she did not know where it was going.

Alex summarised: one, the ISC/SCI make an [info@indexers.ca](mailto:info@indexers.ca); two, the ISC/SCI send that new email to *The Indexer* and the BPC page; three, the contact form could be changed to have the email list above the contact form so that people can find where they want to send the contact form. JoAnne said that this makes sense. She suggested that not all the executive roles appear on the page (for example, the public doesn't need to contact treasurer). Alex said that Judith had said the same thing but that the contact page is used by members as well and they could need that. Lisa said that this list should be kept short and the longer one only be available in members areas so as to cut down on spam for members of the executive. Alex asked if it could be set up so that the public only gets the info email and members could get the whole list. JoAnne said that it was possible, but that the members would have to be logged in for it to work. Lisa said that the society also sends out a list of the executive and their contact after the AGM. Even so, people use whatever they have to contact executive. Ronnie suggested the info email go on the bookmark the next time it is printed. JoAnne asked if the bookmark needed the email. Alex said that it was nice to have a general contact. Julia asked for clarification: is the list of executive members being removed or only the emails? She thought that it is nice to show everyone that is on the executive to show the people that are contributing.

Judith brought the focus back to the general email and said that the proposal that she made doesn't have anything to do with the executive page. She wants a list of common contact addresses with the form so that people know where to send their inquiries. This will make contact more efficient. JoAnne added that discussion had moved to what

should be public and what should be for members only. For example, JoAnne asked Vicki if she wanted *The Bulletin* editor email public. Vicki answered that it is available on the public *Bulletins* and asked how much spam the website form receives. JoAnne said not very much. Alex suggested that the ISC/SCI make an [info@indexers.ca](mailto:info@indexers.ca) email. This email will get forwarded to communications. JoAnne said that web-admin can be changed to go to communications, since info will take over that. Judith agreed to this. Alex asked François to ask *The Indexer* to add the general information address to the ISC/SCI spot on the *Indexer* back page. He agreed and asked that someone let him know when it is ready. Alex suggested keeping the executive list without the emails and on the contact form it will have the general information email; the contact form will go to info address as well.

Judith asked about following the ASI format. She said that this simplicity means that someone doesn't have to know the name of their publications or executive members but can still know where they need to send their message. Lisa said that this structure is clean and easy. Judith said that our contact page is easy to find but could be more efficient. Discussion came back to Judith's suggestion, that on the same page as the contact form there is a curated list (general inquiries, bulletin, communications, membership, and web admin [French and English] possibly) of emails for direct contact above the contact form, which would go to the new general information address. The executive page is to be left as is. Judith asked JoAnne to let her know when this email was made. Everyone agreed to this change and new email.

c) Diversity Bursary (Ronnie Seagren) See report.

Bursary discussion came first. Alex started with page 5 of last meeting's minutes. It was agreed that various possibilities to move forward exist. Option 1, a second candidate from existing applications be chosen; option 2, new applications are accepted to find a new candidate but within this fiscal year; or option 3, leave it up to TIDE. In all cases, people wanted to start it earlier to keep it within this fiscal year. Alex opened the discussion. Stephen said that he liked the idea of a new competition, as the winner and runners up had already been announced. Alex agreed. She added that it would give the ISC/SCI more people on the short list. Alex asked if there were any objections to option 2. There were no objections.

Julia asked for clarification as to what money had been promised where. Alex said that the competition that had just happened was funded by last year's budget. The budget

awarded the bursary again for this fiscal year. This works to shorten the timeline of when this money gets spent so that it is within the year of this budget.

Lisa asked for the options again. Alex said: option 1, the recipient of the third bursary comes from the competition that got the ISC/SCI the second winner; option 2, start a new competition; or option 3 let TIDE decide. François asked, if they take from the current group, what is going to happen next year? JoAnne said that this is the source of the issue. It was agreed in the budget meeting to give the money for one more bursary but this cannot be an annual award. Ronnie said that this is why there needs to be a decision made as to how long this should go on. There was a lot of research that went into this report (fitting into national context, other bursaries, the legality surrounding offering it, etc.). Alex said that the bursary discussion needs to be addressed first, then the TIDE suggestions from the report.

JoAnne suggested going with option 3, as this will be the easiest for TIDE, as long as they can make the decision in time to have the money come out this fiscal year. Lisa said that the closing date should be the first day of the fiscal year, so they have the most amount of time to spend the money. JoAnne said that this could also work with the school year. Lisa said that if the executive committee presents option 3, it would be good to give them information as to how it can be done within the timeline. Alex said that the executive chose a date last meeting that this needs to be done by (November 1<sup>st</sup>). She endorsed Lisa's idea (closing date April 1<sup>st</sup>) should this happen again. Alex also endorsed option 3. Ronnie said that TIDE would choose to do another competition. Alex asked for objections, none, and further thoughts. Lisa said that she would advocate for the second competition, as it works to raise awareness again. Alex told Ronnie to let TIDE to go forward with deciding (executive choosing option 3) but the applicant needs to be chosen by November 1<sup>st</sup> if they run another competition. Ronnie said that TIDE will be recommending the Berkeley course. Alex abstained from any discussion of the courses or making recommendations. JoAnne supported making this suggestion. Margaret asked if the executive committee needed to make a motion to pick option 3. Alex said it is not financial (money already awarded) so there is not one needed. All agreed to go with option 3.

Bringing the discussion back to education recommendations, Jason said that he did not take the Berkeley course because it was so expensive and that should be in consideration. Lisa suggested that the Berkeley course structure was more suited to

someone with a full-time job or family obligations. Vicki took the Berkeley course and agreed with that observation. She chose that course because it was so extensive.

The executive committee repeated that this is not an ongoing bursary (not annual). Alex asked Ronnie to extend executive committee's thanks to the TIDE committee for all of their work. The recommendations from the TIDE committee were a group effort. TIDE recommended that the bursary be continued for three more years.

The executive committee discussed this with the following questions and concerns:

- Can this be legally done?
  - It is consistent with the Ontario Human Rights Code; the EAC does this and there are similar bursaries that are annual. TIDE has spoken to Mary Newberry in detail about this, from her concerns.
- Can this be done from the treasurer's point of view?
  - JoAnne said that this is possible.
- How can the Society determine that the efforts are working?
  - So far, six members, two of whom are still on trial, have come through this program.
  - What would help the executive committee evaluate this kind of effort?
  - The report itself was reassuring, especially hearing from the runners up and winners as to their experience and suggestions.
  - One thing to note, in regards to someone going forward with information management but not indexing, that this is still a success for publishing overall. It could be good to follow who becomes a member or stays in indexing but does not maintain a membership. Just because they are not in the society does not mean that they are not indexing. This could reflect how the ISC/SCI is working with communities as well - is there a barrier?
- The bursary talks about it being a bursary for diversity in publishing (rather than indexing).
  - It has been suggested to TIDE that "for new indexers" always be added so that the intentions of the bursary are clear.



- How can we tell what the demographics in the Society are?
- The next membership survey will ask for self identification to help provide context and information.
- Does the ISC/SCI aim to represent Canadian society (percentage of people etc.) – is the ISC/SCI close to the numbers? Should this be part of the regular survey or should it be its own survey?
  - The report from TIDE took information from the census.
  - It is probably best to include these questions in the membership survey as the ISC/SCI is asking them for their information anyway. The next survey is coming out in the fall. Lisa said that these identification questions should be present every year.
  - TIDE could recommend demographic questions.
- Could the executive committee hear from the runners up/winners more often in the annual reports? A survey or form for the recipients might be good. What would we want to know from them about their experience? Could we follow the winners and runners up for a few years?
- Should the five criteria be re-evaluated? They are very broad.
  - The criteria address structural disadvantages (education, incarceration, etc.) and works well to introduce indexing to communities who may have not been exposed to it before.
  - Could the TIDE committee without giving any names, show the executive committee the information of the breakdown of groups present in applications?
  - TIDE has made a conscious effort to bring in more applications from Indigenous people. One of the criteria in the application is experience with freelancing.

Discussion moved to the next recommendation, that the ISC/SCI continues to offer six-month memberships to runners up.

- There has been some confusion as to what is covered. TIDE sees it as a way to expand the number of people that could be impacted with the same amount of money but it should be clarified as to what this includes.
- Can you apply as a member and get something retroactively?
  - The applications do not currently show whether the applicant is a member but the criteria could state that current members cannot apply. If someone is already a member, they have momentum to continue moving forward. The point of the bursary is to boost people who haven't gotten that far.
- There are no current limitations as to how many times people can apply.
  - This is something that should be decided—TIDE could make recommendations about that.

The executive committee decided to ask TIDE to add that applicants may not be members, and clarified that the six-month free trial only comes with what we can provide for free (no *Indexer*, no ASI webinars).

The executive committee believes that this was already discussed by the executive committee, and TIDE should look up the details from the September meeting where it was discussed.

- Will the number of runners up be consistent (this year had four, last year had two)?
  - Yes, it had been decided that TIDE could choose up to three people each year (or application group).

Discussion moved to the recommendation that the bursary continue for three more years (one has already been agreed to). This would see a group application in 2022 and another in 2023. The executive committee agreed that it needs to be suggested to the winner that they take a course that is paid for by the end of the fiscal year (exception for extenuating circumstances). Two bursaries have been awarded, one has been agreed to and then this recommendation would add number four and number five. That would be the end, according to this recommendation.

- This recommendation has merit, as this is a long-term effort. It takes time to create an impact that can be evaluated. This program is just launching still and that it needs a few more years.
- Is there a five-year plan financially? Could TIDE develop some evaluation criteria?

### **MOTION**

Ronnie moved that that the executive committee accept TIDE's recommendation for a scholarship for years 4 and 5 (22/23 and 23/24) in which they try to ensure that the money is spent by the end of the fiscal year, given that the financial situation of the ISC/SCI finances allows for the bursary to take place. This was seconded by Vicki.

The executive committee suggested recommending that the TIDE committee switch their year around, this year has a November 1<sup>st</sup> deadline; for bursary number four, applications start sometime around July, and for number five, applications start at the beginning of the fiscal year. This would create a gradual switch to give the whole year for spending

No further discussion. Vote called. 8 in favour. 1 against. No abstentions. Motion carried.

- d) Freelance Union, or How to Get Paid. See report.

Sergey brought a question forward about how the ISC/SCI can help members who are having trouble getting paid. Alex spoke to Leah, who suggested threatening to go to a collections agency, to go to small claims court or to find a volunteer mediator. Leah said that the writer's union has a form letter. There is no real standing for this. Alex will follow up with the writer's union again. Sergey had suggested looking into the freelancer's union. Alex thought that the ISC/SCI needs a committee that can pull together the information that can be found to put together a package for members to suggest some things that can be done in a situation where they are having trouble getting paid. François thought that it might not be the place of the ISC/SCI to get too involved. The society can provide information and be a resource but not get too involved. JoAnne suggested that the union be an individual project. Alex asked Ronnie to tell Sergey that the ISC/SCI is looking into other sources and will write a report but needs some information about the freelancer's union; could he please get some information and write up a report about it to be included in this package?

## 6. Action Items

### 7. New Business

#### a) Knowledge Management Committee.

Marco approached Alex and said that he had taken a course in this. Alex is happy to work with Marco to work through this need for the ISC/SCI. She asked Judith to come to the meetings to make sure that the right questions are being asked. Alex said that Marco will not be changing anything but will look at things and come to the executive committee with recommendations. Alex said he should not see the awards information and membership. Marco would provide an overall plan as to what is kept, how it is kept and where it is kept. JoAnne thought that this was a good idea as the DropBox limit messages are coming again. Lisa said that he should only see financial stuff that is available to all members. She said he wouldn't need to see the other information anyway as it is kept somewhere else. Stephen asked if there was something like an internal wiki? Someone had recommended GitHub to him for that roll, recently. Stephen asked about mentorship, as it has its own section. Alex said that he should know about it but shouldn't go in. Ronnie said that TIDE has a separate folder as well. JoAnne said that maybe committee folders should be kept separate, **expect** the conference maybe. Alex asked JoAnne to send her a list of the folders to go through. Alex asked the executive committee if everyone is ok with having a knowledge management person assisted by her and supervised by Judith. The committee said yes.

#### b) Communications Procedures in General.

Alex asked if everyone had a chance to take a look at this and asked for comments or discussion. Alex said that she thought that only the executive should send things for translation. Once someone gets the translation back, they must put it in the to keep folder so that it can be used by multiple people. Alex will write that in. JoAnne asked to add how information gets sent to the web admin as well. Alex said that she will change that. Judith and Alex were working on creating some generic press releases for use. A few have been put together so only the middle needs to be generated by committees and translated. This will serve to reduce some fees.

## **8. Other Business**

This is the last meeting that Stephen Ullstrom and François Trahan will be attending (at least for the next while!!).

Stephen joined the executive committee in 2015 as the website administrator, and then changed to Prairies and Northern Regional Rep in 2017. He received a Certificate of Recognition in 2017, and the Tamarack Award in 2019. He was the prime initiator of the Mary Newberry Mentorship Program.

François Trahan has been on and off the executive committee since 2008, as BC regional rep, vice-president, and most recently as the international liaison. He received the Tamarack Award in 2013 and a Certificate of Recognition in 2017. He has been the voice of calm and reason on the executive committee for many years.

We thank both Stephen and François for their service and wish them well.

## **9. Next Meeting (after AGM) – September 25<sup>th</sup> for next meeting at 1pm EST**

**10. Adjournment – Alex offered thanks to everyone for their discussion and work.  
Adjourned at 5:06 pm EST.**

## Central Region Report (Ronnie Seagren)

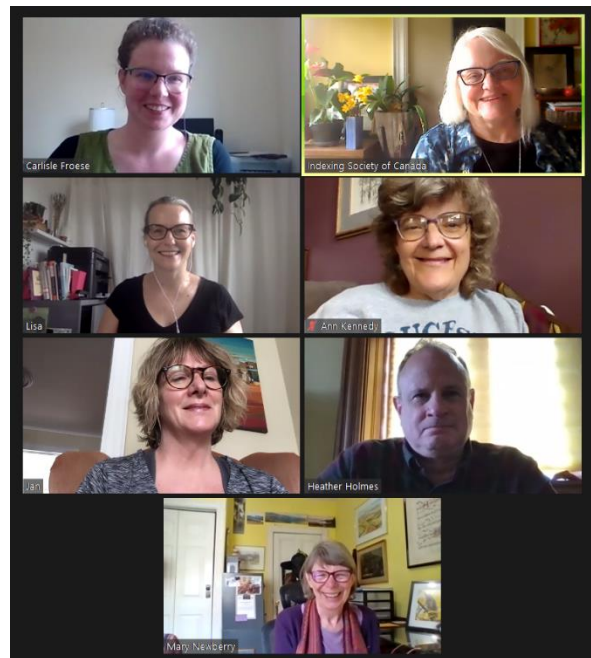
Submitted by Ronnie Seagren, Central Region Membership Representative



We have been meeting monthly on the fourth Saturday of every month (January 29, February 27, March 27, and April 23 since the last meeting. Our meetings range from about seven to fifteen members.

In January Carla De Santis presented her award-winning index for *Cultures of the Fragment*. She explained her process and revealed the tricky decisions she had to make in indexing the book. We then reviewed the criteria for evaluating indexes submitted for the Ewart-Daveluy award and discussed the index in the light of those points. We didn't have much time to try our hand at the sample pages Carla shared, but it was a very satisfying meeting.

In a conscious effort to attract experienced indexers, I started to send out four seed questions for each meeting. In February we focused on people's latest indexes and what challenges they faced and what they learned from them. In March we concentrated more on experiences with publishers, editors and authors. April's meeting took a deep look at how we edit our indexes, and I will write this one up as a *Bulletin* article when I get the chance. The image at right was taken on Zoom after several had left. Detailed meeting reports are in the Central Canada folder for Feb and March.



My spreadsheet is up to date until a couple of new members I just got from Judith. I have detailed reports in my folder and I'll have a composite report for the AGM.

### *Prairies and Northern Canada (Stephen Ullstrom)*

I have very little to report since my last update in February 2021. I have sent a couple of emails of news and updates to prairie members, and have communicated with new and potential members, but haven't organized a regional meeting in the last few months. Looking forward, if all goes as planned, I anticipate stepping down as the prairie rep at the AGM, with Liese Achtzehner replacing me.

Looking back over the four years since I started as prairie rep, the number of indexers in the region has grown, with several new indexers joining. Many of them are from outside Edmonton, which is exciting. Having Zoom makes it much easier to organize meetings in which all can participate. These are all positive developments, and I look forward to seeing how the region continues to grow under a new rep.

I also want to note my thanks to Alex Peace for all of her work spearheading and helping the regional reps update the position description and to document procedures. That has been a lot of work, and is a big support for current and incoming reps.

This report is for information only. No discussion necessary.

---

### *BC Report (Lisa Fedorak)*

The BC region continues to meet on the 4<sup>th</sup> Wednesday evening of each month.

#### **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 and what might be coming down the road as things may start to be changing in the long term as covid continues.

#### **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 a Vancouver indexing student of Kari Kells who checked us out as well. Judi Gibbs presented excerpts from 3 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 and a bit earlier in the day to allow for more attendees from the east.

***The next meeting will be in June after the AGM and editing is our next topic.***

***This report is for information only. No discussion needed.***

---

### *Eastern Canada Report (Jason Begy)*

Submitted by Jason Begy, Eastern Region Membership Representative.

We have been having monthly meetings on the fourth Wednesday of every month (February 24, March 24, and April 28 since the last meeting). 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, and 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.

---

### *Ewart-Daveluy Indexing Award Committee – 2021 05 08 (Judy Dunlop)*

#### ***Guest reviewers***



- Kate Mertes joined us as a guest reviewer for the evaluation of the 2021 submissions. We were grateful for her valuable input, and we hope to add other guest reviewers in the future.

### **2021 Award**

- We were pleased to receive a reasonable number of submissions. The 2021 winner is scheduled to be announced on Thursday at our virtual conference. Congratulations to the winner will include our website announcement, a letter to the publisher, and articles in our Bulletin (English and French) and in *The Indexer*.
- Award winners are usually given two complimentary banquet tickets. When we have our next in-person banquet, we will provide complimentary tickets to the winners from 2020 and 2021.

### **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. You can expect varied topics and time for questions.

---

### *Bulletin newsletter report – Vicki Gregory*

The spring *Bulletin* went out on time, and was a much more relaxed process! Last year’s mission was to get 3 issues out in about a 5 month period. This time I had 3 months or so to work on a single issue which was much more relaxed. This gave me more time to review the articles; send emails; and complete admin tasks. I projected 6 weeks from the article submission deadline to the finished Bulletin up on the website. I really appreciate all the hard work by the Bulletin team.

I’m really happy with issue #1 and the feedback has been very positive!

I’ve been time-tracking with Toggl and have logged 10 hours on issue #1. I forgot to time myself a few times and I don’t think to log the time when I send a quick email. Issue #2 and #3 will provide more insight.

I'm thrilled when members come forward with article ideas! I also find ideas from discussions I see in the IDG group and ISC email list.

I've given some thought to giving contributors wordcount guidelines as I'm often asked about this and we did have a space issue on issue #3, 2020. With that in mind I suggest a few paragraphs or up to 1500 words, whichever works best for the article. I came up with this by reviewing the word count of a few longer articles. This gives contributors flexibility and removes the pressure to achieve a specific word count.

**This report is for information only.**

---

### *Past President Report 2021 05 08 (Margaret de Boer)*

I can be quick this time!

Succession work with Jason was successfully completed in the new year.

Ronnie is now fully involved and has taken over the reins as the Book and Periodical Council (BPC) representative. I attended my last meeting in April.

Mary Newberry and Judy Dunlop as co-chairs of the Awards Committee have stayed in communication with me and will send their report separately.

Lisa and I are in the final stages of preparing the list of our first emeritus memberships and the certificates and badges will be presented later this spring, presumably during the AGM.

This report is just for information. No motions/ no discussion required.

---

### *Conference 2021 Report (Lisa Fedorak)*

Conference preparations continue for the virtual conference that takes place May 27-29, 2021.

The early bird registration closed on April 30<sup>th</sup> with 98 individuals registered. Two have come in since then and as of May 2, we have 100 registrations. We anticipate more

registrations at the regular rate than during in person conferences due to the lack of travel requirements and the slight difference between the two.

A number of individuals from around the world are registered from Europe, the US, as well as Australia, South Africa and China.

Our technical support, Les Stickles is in place to man the breakout rooms, help troubleshoot and track questions during presentations.

An email will be going out on May 2<sup>nd</sup> that will be gathering information from registered attendees to help us determine topics for our themed discussion rooms as well as gather trivia for our quiz.

---

*International Liaison (F. Trahan)*

### ***ICRIS informal meeting online***

We had the meeting on 7 April. Members of all but one society showed up (NIN, DNI, CSI, ASAIB, ANZSI, SI, ASI and ISC/SCI), plus Maureen MacGlashan. This added up to 14 people in total.

Each society spent 10 minutes speaking about the same topics, then we asked questions to each representative. It was a successful meeting, everyone seems to have enjoyed seeing each other and discussing issues 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 theindexer.org website (international tab), along with an additional report from the China Society of Indexers (CSI).

For Information

---

*May 2021 Membership Report (Julia White)*

### ***Activities Completed***

- Provided membership reports for *Bulletin* issues

- Sent update to Society of Indexers for March 2021 *Indexer* mail out
- Ongoing updates of membership renewals, activations, and lapses

***Planned Activities***

- Resources for newcomers

***Membership numbers***

As of May 1, 2021, we have 122 active members.

On a year-over-year basis, overall membership numbers have increased 15.1%.

Canadian memberships have risen and international memberships have gone up as well.

Since the last full report in January 2021, the total number of members has increased by five. The increase was due to rises in individual listed and institutional memberships. Numbers of student and individual basic memberships have gone down slightly.

<b>Comparative</b>	<b>May 2021</b>	<b>January 2021</b>	<b>May 2020</b>
<b>Total</b>	<b>122</b>	<b>117</b>	<b>106</b>
Canada	103	100	89
International	19	17	17
Individual Basic	31	32	27
Individual Listed	72	68	66
Student	3	4	3
Emeritus	3	3	3
Institutional	11	8	7
Basic Trial	2	2	n/a

RESIDENCY OF MEMBERSHIPS							
Canada	Total	Basic	Listed	Student	Emeritus	Institutional	Basic Trial
BC	22	8	10	1	-	1	2
AB	13	2	9	-	1	1	-
SK	3	1	1	-	-	1	-
MB	-	-	-	-	-	-	-
ON	49	11	32	-	2	4	-
QC	10	3	6	1	-	-	-
NB	1	1	-	-	-	-	-
NS	3	-	3	-	-	-	-
PEI	1	1	-	-	-	-	-
NL	1	1	-	-	-	-	-
<b>Total Canada</b>	<b>103</b>	<b>28</b>	<b>61</b>	<b>2</b>	<b>3</b>	<b>7</b>	<b>2</b>

International	Total	Basic	Listed	Student	Emeritus	Institutional	Basic Trial
Australia	1	1	-	-	-	-	-
United Kingdom	1	-	-	-	-	1	-
United States	17	2	11	1	-	3	-
<b>Total International</b>	<b>19</b>	<b>3</b>	<b>11</b>	<b>1</b>	<b>-</b>	<b>4</b>	<b>-</b>

### ***New members***

The following members have joined (or rejoined) since the last full report on February 2, 2021:

Maria Luisa Antonaya, St-Lazare, QC; Individual Listed  
 Allan Cho, Vancouver, BC; Basic Trial  
 Angela Gough, Waterloo, ON; Individual Basic  
 Michelle Guiliano, Etna, NH; Institution Basic  
 Frances Lennie, Rochester, NY; Individual Basic  
 Maureen MacGlashan, Largs, North Ayrshire, UK; Institution Basic  
 Matthew MacLellan, Vancouver, BC; Basic Trial  
 Geneviève Mangerel, Saint-Laurent, QC; Individual Basic  
 Lora Marchand, Corinth, VT; Individual Basic  
 Nicole Riguidel, Saskatoon, SK; Individual Listed  
 Emma Stens, Toronto, ON; Individual Basic  
 Andrew Young, Ottawa, ON; Individual Basic

**This report is for information and can go in the consent section of the Agenda.**

### *Mary Newberry Mentorship Program (Stephen Ullstrom)*

The mentorship program has been fairly quiet since the last report in February. There have been no new applications. Two applicants, who reached the point of being matched with a possible mentor, ultimately decided, for different personal reasons, not to commit to mentorship at this time. While that is disappointing, I think it also shows that the application process is working, as applicants consider more concretely what mentorship will be like and how it fits into their wider career and life. Realizing that now may not be the right time is still a successful outcome, rather than having problems arise during mentorship due to issues which could have been foreseeable. The two who chose not proceed at this time are still welcome to apply again.

There are currently three mentorship pairs still underway, all nearing the end of their time. I will be following up soon to check on their progress.

The program will soon have a new coordinator. Tere Mullin has volunteered, and I am excited to have her take over. Tere has been in the program as a mentee, which will be valuable experience. We have agreed that we will begin the transition at the same time that she takes over the Eastern rep position, after the AGM. We are still open to a second coordinator joining Tere.

A wonderful article on mentorship is in the latest *Bulletin* (vol. 43 no. 1). Vicki Gregory proposed the idea, solicited comments from past and current participants, including a plug from me for new coordinators, and did an excellent job editing together all of the contributions. Many thanks to Vicki for making that happen.

The information about mentorship on the ISC/SCI website is also getting an overhaul, thanks to Alex Peace noticing and suggesting some ideas. That is still to be completed. The application forms also need some minor updates.

Going forward, my focus will be documenting procedures for Tere, and working to make that a smooth transition. I am thankful that the program is continuing and I'm glad to have been able to help keep it alive this last year. It is encouraging to know and hear that members are benefiting from the program. I also think that the program needs someone with better administrative skills than I, and some fresh ideas and energy, so am glad to pass it on to capable hands.

This report is for information only. No discussion needed.

---

### *Surveys Report (Lisa Fedorak)*

The Rate Survey was sent out in April and is meant to close on May 5<sup>th</sup>. At this time we have 29 respondents, so a little under a third of the membership.

I had been hoping to have a report with some brief analysis of the survey, however with this few respondents, I will extend the deadline.

---

### *Translations Policy Ad Hoc Committee, 2021 05 08*

#### **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.



<b>Page</b>	<b>Number of Words</b>	<b>Total Amount (\$)</b>
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
<b>Totals</b>		<b>\$786.12</b>

This report is for information only.

*Website Administration (JoAnne Burek)*

Activities included the following:

- Added the conference page and the conference registration form

- Created the Magpie Kudos form
- Updated the Bursary form
- Updated the Ewart-Daveluy Awards page and form
- Reorganized/rewrote several pages for French translations and bilingual content, as well as the Bulletin downloads page under Resources (as per the decision to offer just three sample Bulletin issues to the public).
- Answered how-to questions from members about updated their membership information. Some of these questions and answers were added to a page on the website "Website FAQs" which can be accessed from the Member Dashboard
- Fixed broken links
- Updated the website user guide in Dropbox (under the Board/Website folder)

We had an instance where a member's listing completely disappeared. I tried to investigate, but found there was no way to tell what had happened to his listing, nor could we know how long it had been missing. It could have been years. To compensate, I proposed to the membership secretary and the president that we extend his membership one year for free. The president agreed. The member was satisfied with the offer, and in fact, thought it was generous.

This report is for information only.

---

### *2021 08 05 Webinar Policy and Procedures Ad Hoc Committee*

Wendy and I have met again to discuss the issues raised by the executive committee.

Stephen Ullstrom also sent some questions to be addressed, and we have worked on them. We will be checking back with Stephen.

We have finished a second draft of the policy and we will work on the procedures next.

For information only.

## *2021 05 08, President's Report*

One of the indexes I was waiting for came in two-and-a-half weeks late, so I got a bit done this period. . . . In general, I worked hard to get my to-do list down to a reasonable amount in time for when Jason joins me. I don't want a backlog for when he starts. I'm down to two pages now.

### **Administration**

- wrote to lapsed members for February and March
- talked to executive committee about François as special advisor
- invited Liese and Tere to May 8 meeting
- worked on minutes with Carlisle
- organized agendas and reports for the budget meeting, the May 8 meeting, the ICRIS meeting, and started to get organized **for the AGM**
- got bookmarks printed and mailed to Judith for the publishers' letter

### **AGM Tasks**

- chose Tamarack Award Winner, wrote to three people asking for testimonials, sent the letter off for translation
- updated the pre-AGM to-do list and added presidential duties
- updated the post-AGM checklist and posted for review
- arranged with Ronnie to practise for the AGM
- organized the thank-you list and started to write thank-you cards

### **Committees/Meetings**

#### **TIDE**

- followed up on Quill and Quire

#### **Bulletin**

- mailed out spring Bulletins

- wrote article about stuff we are doing to promote indexing/indexers: Congress ad, BPC, Editors Canada, WotS TO, and publishers' letter: Please review
- gave Archives file to Siusan for Focus On articles

### ***Conference 2021***

- made sure that motion for conference 2021 budget was written up and in meeting folder
- discussed various aspects of the conference with Lisa
- formatted the program for the conference

### ***Ewart-Daveluy Award***

- sent four press releases from 2020—English and French for both Ewart-Daveluy Award and Tamarack—and found the photos for all the awards and sent to JoAnne for fixing on the website
- looked at Mary's procedures, discussed with Judith, updated areas of communication, sent to Mary and Margaret for the committee to review

### ***Regional Reps***

- met with regional reps several times to discuss various housekeeping activities and the monthly video chats, discussion needed

### ***Communications***

- met with Judith to discuss various topics such as the Ewart-Daveluy Award communication procedures, the Wikipedia article about ISC/SCI, the generic info doc on ISC/SCI, the BPC communication procedures

### ***Translations***

- wrote report for translations committee asking for funds from the budget
- worked with Stephen on the Mary Newberry Mentorship Program website page, preparatory to getting it translated, not complete

### ***Webinar Policy Committee***

- worked with Wendy on the webinar policy

### ***ICRIS***

- scheduled next informal meeting for Wednesday, September 29, 2021
- organized and chaired the informal meeting

### ***Documentation and Procedures***

- worked on the executive committee procedures manual (Board Binder), sent it to Tere and Liese, and made corrections after their comments
- worked with regional reps on admin tasks such as timekeeping, membership lists, reports in folders
- added notes about liaison procedures to the Board Binder
- made generic documents for letter to Tamarack Award winner
- made generic documents for press releases and announcements for the Ewart-Daveluy Award committee
- updated various job descriptions
- worked on a number of procedures manuals for executive committee positions and committees, including those of the regional reps, Ewart-Daveluy Award, membership, communications, and for the presidents.

### ***Magpie Kudos***

- Once JoAnne had the Magpie Kudos form set up, I wrote up a blurb about it for the Bulletin, for posting to the website, and for sending out to the members by email.

### ***For Discussion***

- updated the post-AGM checklist and posted for review (everyone!)
- annual reports due May 8, 2021 (everyone and their committees!)
- wrote article about stuff we are doing to promote indexing/indexers: Congress ad, BPC, Editors Canada, WotS TO, and publishers' letter: Please review
- met with regional reps several times to discuss various housekeeping activities and the monthly video chats, discussion needed

The reps and I met quite a few times to discuss how to meet the needs of various constituents of the membership: the new versus the experienced and the national versus the regional.

We suggest that the regional meetings continue as is . . . having speakers, index critiques, specific topics. And that the national meetings continue as is . . . dealing 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 suggest that they alternate. 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

and so forth.

We suggest that this starts after the AGM, in July 2021.

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 showing up so much for the monthly video chats.

Our suggestion is that we compile a list of resources including specific articles from the *Indexer*, various webinars from ASI, JoAnne's marketing webinar, and so forth, and make it available to new indexers so that they get what they need without crowding out the experienced indexers. If there are gaps, then possibly ISC/SCI could request specific webinars to cover those topics.

The topics we thought might be good include the following:

- how to get the first job
- marketing

- how to quote
  - client relationships
  - business aspects: taxes, accounting, website, timekeeping, scheduling
  - frequently asked questions: aboutness/metatopic
  - software: indexing software, PDF reader/Adobe
  - macros
- 

### *Communications (Judith Clark)*

#### *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.

#### *Press releases and awards (general)*

- Announced upcoming ISC/SCI Annual Conference per procedures.
- Drafted E-D Award recipient template which can be translated into French to cut down on time creating press releases and announcements and speed up translation process.
- Met with Alex to discuss (among other topics) ways to improve process for communicating about awards with public.

#### *Miscellaneous*

- Updated distribution list.
- Updated Wikipedia page.

#### *Making it easier to communicate with ISC/SCI*

In the course of checking into updating the content posted for ISC/SCI on the thebpc.ca, I came up with the following recommendations to make it easier for members and the general public to connect with the organization.

- Create an email [info@indexers.ca](mailto:info@indexers.ca) and use this email for the Contact page general form. Direct email to the [info@indexers.ca](mailto:info@indexers.ca) address, along with the contact form submissions, to the Communications Director, who will respond or reroute to the appropriate person.
- Use the new [info@indexers.ca](mailto:info@indexers.ca) email as a contact email for “The Indexer” and on thebpc.ca’s page for ISC/SCI. [NOTE: currently one of the two email addresses listed on thebpc.ca for ISC/SCI is [web-editor@indexers.ca](mailto:web-editor@indexers.ca) which is not an email found on the list of Executive Committee emails so I am not sure where it goes.]
- Add emails for specific roles to the Contact page. Currently there is only a contact form. Many users will know the specific office they wish to contact (Bulletin Editor, etc.). List appropriate emails (similar to the ASI page: <https://www.asindexing.org/contact-us/>)

For example:

General Inquiries

[info@indexers.ca](mailto:info@indexers.ca)

Bulletin Editor

[bulletin\\_editor@indexers.ca](mailto:bulletin_editor@indexers.ca)

Communications (press releases, announcements, general publicity)

[email]

Mentorship Program

[email]

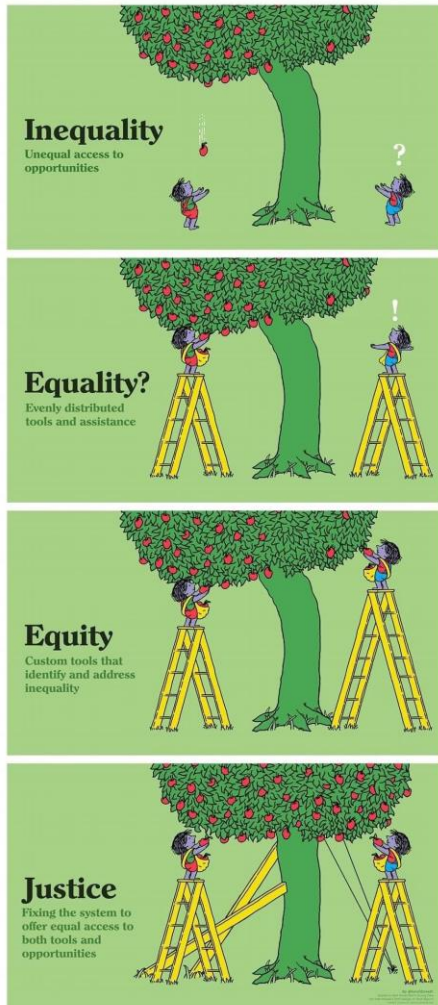
Etc . . .

### ***Discussion***

If we need to vote to approve these changes, we need a motion and second to make the changes agreed upon by the Executive Committee.



*ISC/SCI Diversity in Canadian Publishing Bursary Report to Executive  
 May 2021*



Contents

[History of Bursary](#) ..... 3

[How the bursary fits with ISC/SCI](#) ..... 3

[Details of Our Bursary](#) ..... 4

<a href="#">How We Got the Word Out</a> .....	4
<a href="#">Results so far</a> .....	5
<a href="#">Establishing a baseline of comparison</a> .....	5
<a href="#">In their own words: survey of first-year participants</a> .....	6
<a href="#">Interim Conclusions</a> .....	8
<a href="#">Related Diversity Bursaries</a> .....	9
<a href="#">Editors Canada</a> .....	9
<a href="#">Myths about Affirmative Action</a> .....	10
<a href="#">Diversity in Publishing</a> .....	11
<a href="#">Diversity and Racism in Publishing Stories</a> .....	14
<a href="#">Going Forward</a> .....	16

## History of Bursary

Since 2014, when the hashtag #WeNeedDiverseBooks appeared, the Canadian publishing industry has slowly been waking up to both the lack of diverse voices and the demand for them. Numerous studies have shown both of these facts to be true (see for example BNC Research, Demand for Diversity: A Survey of Canadian Readers and 2018 Canadian Book Publishing Diversity Baseline Survey – Association of Canadian Publishers (ACP)).

This bursary is part of a special program to contribute to filling this proven gap by helping to achieve equality of opportunity for aspiring indexers belonging to underrepresented and/or marginalized groups. The application names BIPOC (Black, Indigenous, and People of Colour), LGBTQ2+ and disabled people as part of the focus of our bursary.

The bursary is granted to a person to cover fees for an approved indexing program (up to \$1100), two years of ISC membership with listing, and entry into the Mentorship program (\$100). It costs the Society up to \$1200, depending on which course people take. Based on the first year's experience, we are recommending they take the Berkeley course, which is more complete (and the most expensive).

This bursary was first suggested in 2017. It took 3 years to come to fruition. It was first presented by the Special Projects Committee, who did the original work, found the original contacts to send the bursary announcement to and who then handed the bursary over to The Inclusion, Diversity and Equity (TIDE) committee – part of the Outreach Committee.

How the bursary fits with ISC/SCI

In a document that detailed the original idea, Special Projects explained how the bursary fit with ISC/SCI's Vision and Mission Statements.

Some key ideas were:

- Diversity in indexing means more informed people: indexers broaden their scope and ideas, and users become more informed through indexers.
- Gaps we currently might have in our indexing profession could be filled by reaching out to larger groups of different people. The more diverse our indexers, the more potential to break into other subject matter and industries. When our community produces excellent indexes in various sectors of society we all win.
- This initiative benefits membership because diversity benefits ALL people. Quality indexes in unlimited subject matters means ISC/SCI is a strong body and authors and publishers will come to us with confidence.

*[Please see Source A – Bursary ORIGINAL writeup]*

TIDE itself has mission and goals.

These are listed on the ISC/SCI TIDE webpage; some highlights are:

- Mission: To have the Indexing Society of Canada / Société canadienne d'indexation (ISC/SCI) fully reflect the diversity of Canadian society and to be able to provide high quality indexes to diverse stakeholders outside the society.

- Recruit new people from diverse backgrounds who are interested in indexing as a career
- Support these new people who join ISC/SCI
- Encourage these new people to join committees and contribute
- Focus initially on individuals who are BIPOC
- Begin dialogue about ISC/SCI with visible minority and structurally disadvantaged community groups

[See: <https://indexers.ca/volunteer/tide/>]

TIDE also has a response to the Truth & Reconciliation Calls to Action that states: The Inclusion, Diversity and Equity (TIDE) committee is guided by the principles of the Canada Truth and Reconciliation Commission's (TRC) Calls to Action document. In particular, TIDE committee will focus on these goals for Indexing Society of Canada / Société canadienne d'indexation (ISC/SCI) as an organization:

- Establishing and maintaining mutually respectful relationships
- Being properly reflective of the diverse cultures, languages and perspectives of Indigenous Peoples
- Increasing equitable access for professional development opportunities

The bursary functions as one way to begin to meet all these aforementioned visions and goals. Over the past few years there have been many discussions on both IDG and ISC lists about terminology regarding race, Indigenous issues, sexuality and disability. People are indexing more and more of these books and the more diverse our indexers the more they are able to contribute to the conversation, give the industry precise and thoughtful indexes, and make our societies more welcoming.

## Details of Our Bursary

### How We Got the Word Out

We sent messages and posted online to 71 different organizations as well as personal contacts and all ISC contacts and lists. Many of these organizations (community groups, specific departments at universities) do not have anything to do with publishing and are likely hearing about ISC, and indexing, for the first time. Most of our contacts were found by TIDE and are BIPOC focused. In 2021 we will be adding to our contact list to include LGBTQ2+ and organizations for people with disabilities. Our communications bring awareness of the Bursary, TIDE, the Indexing Society of Canada, and indexing in general.

Of the 51 people listed in the Association of Canadian Publishers Diverse Freelancers Database list at least 4 of them have applied to the ISC TIDE bursary so far.

In the Book Publishing Professionals LinkedIn group, Anish Kumar had this comment about the Bursary application: It's a "one-of-its-kind application I have seen so far . . . It's so nice."

## Results so far

So far 13 people have applied for the bursary over two years. Of these, two were awarded the bursary, and five received six-month trial memberships. We are just announcing the winner of the second year. The number of people who applied for the bursary indicates that there's a need for it. In the first year, 3 of 4 people completed an indexing course, and all 4 have participated in both regional and national chats. One postponed his membership mid-stream for several months because of paternity leave for his first child and has resumed it. The success of the trial memberships indicates a willingness to invest energy into learning about and participating in the profession.

As we all know, training is only the first step in becoming an indexer, and it takes several years to build a successful business. Followup and engagement can easily make the difference between a successful program and a token action. The Forbes article linked below emphasizes the importance of inclusion for diversity initiatives to “stick,” especially support and mentorship. TIDE has followed up with the first-year people in several ways:

- [Inviting the bursary winner and runners-up to regional and national chats](#)
- [Holding a meeting after three months and occasional check-ins by email or phone](#)
- [Conducting the survey reported below](#)
- [Siusan is helping two indexers find their first paid indexing contracts](#)
- [Mary is reviewing Sandra's first indexing work](#)

[See <https://www.forbes.com/sites/ashleystahl/2020/07/21/10-steps-businesses-can-take-to-improve-diversity-and-inclusion-in-the-workforce/?sh=5f3b4da4343e>]

## Establishing a baseline of comparison

It's clear that there are both personal and structural reasons for success as indexers. In thinking about how to evaluate the program, even though it's early, we looked first at existing indexing courses for possible comparisons.

We considered how to compare the decisions of bursary recipients about indexing to those of other indexing course participants, but at the moment it seems impossible to develop a baseline. In talking with Heather Epps and Sylvia Coates about the Berkeley course, for example, we found that completion rates are around 80-90%, with the course itself helping some students realize indexing wasn't for them. Sylvia says that Berkeley grads make up the majority of new indexers in ASI since 2004.

In online courses the instructors don't know that much about the identities of students, so it's impossible to know demographics – ages or how they identify. In addition to Americans, the Berkeley course has a good number from Canada, as well as some from Australia, UK, Africa, and probably elsewhere. Motivations vary: a career or second career, an adjunct to services they offer, indexing their own books, etc. There are no stats on how many who graduate actually do get into indexing soon after the course, but many do.

The ASI course committee recently contacted Sylvia and said their completion rates are only 11% so far, and as a result of these poor outcomes, they're developing a new course, which may take a couple more years.

Mary Newberry's Ryerson course has slightly lower completion rates than Berkeley because it's shorter and less expensive and therefore less of a commitment. About a third to a half become indexers, and not always immediately. We haven't yet looked into the BC or SI courses.

In their own words: survey of first-year participants

We surveyed last year's winner and three recipients of trial memberships. Here are the highlights of their responses, with quotations in dark blue. They each have a background that could lead to indexing specialties and show evidence of the qualities needed for successful freelancing.

**Sandra Muchekeza** comes from the world of business analysis and management but also owns a publishing company for children's books. She would like her index focus to be on social justice. She is currently working on her first index. Sandra is the winner of the 2020 bursary.

**Leah Horlick** is an award winning poet. She also is involved in LGBTQ2+, science/medical, differently abled and Jewish communities. She is currently working on her first index. Leah won a 6-month trial membership in 2020 and is now a full member.

**Allan Cho** has been working in the publishing field for over a decade as librarian and editor. He blogs about technology, copyright and diversity in libraries. As an expert in Asian Studies he is Festival Director for LiterASIAN, the only literary festival of Asian North American writers in the world. Allan won a 6-month trial membership in 2020.

**Puneet Sekhon** was a marketing professional and was enrolled in the Publishing program at Ryerson when she applied for the bursary. She is a volunteer editor for a BIPOC online publication and is enrolling in grad school. Puneet won a 6-month trial membership.

### **1. *Whether they would have become indexers without the bursary***

Sandra said she'd never thought of becoming an indexer. She "got interested because of the diversity aspect . . . I thought that there were probably not many black women indexers and I wanted to help fill that gap. I did not know that it was an actual career path. I knew nothing about indexing save for what I saw at the back of books. If I did, I might have taken it up sooner. [The bursary] certainly influenced me to seriously consider indexing as a career option."

Leah wasn't thinking of becoming an indexer. "I was desperately looking for a new career and this kind of trade, though, so the timing was right. I saw someone I know and trust post the link to the bursary program on Facebook and took that as a sign!" She might not have heard about indexing without it. "The bursary was a huge gesture that demonstrated to me that I could expect a safer and more respectful working environment than in my previous industry."

Allan has a website for libraries + publishing + diversity with an emphasis on Asian writing. He said he'd always had an interest in indexing since library school and he couldn't register because the class was full, and thought of it as a second career. What kept him from becoming an indexer earlier was knowledge about the profession. "A lack of understanding and knowing

people working as indexers kept me from pursuing a career in this area.” When asked how the bursary application process affected his decision, he noted “a sense of inclusion for BIPOC individuals. From a look at the conference speakers list, there are few visible minority indexers. When I applied, I felt that I could make a difference in the profession and contribute to the lack of diversity in the profession and really help it grow. There has been some headway in librarianship with equity, diversity, and inclusion, so perhaps this could happen with indexing, too.”

Puneet has just finished her Ryerson Publishing certificate. “I didn’t renew my membership because I have decided to pursue a different career path and would like to put my indexing pursuits to the side for a little while. However, I have actually also been accepted into grad school in the Master of Library and Information Sciences program, so I’m sure that I’ll be revisiting my interests in indexing soon in the future. But I truly enjoyed the TIDE community and all of the support I received from the organization! Thank you so much for everything :)”

## **2. Indexing courses**

Three of the four took indexing courses: Sandra the UBC, Leah the Berkeley, and Puneet the Ryerson course. Sandra said, “I do not think I would have pursued indexing were it not for the bursary because not knowing much about what indexing entails, I would not have made it a spending priority. That would have been my loss.”

Leah added, “even though I wasn’t awarded the funds, the reduction in professional costs (like the free membership) and all the mentorship has still made it much more possible for me to participate, get my training, and get set up.”

Allan was ready to register and take a course, regardless of the bursary. “With my child now and full-time work, my plans have taken a turn. . . . I plan to take the course in a year or so in the future when I have more time.”

## **3. Experience with the indexing community so far**

Sandra said, “My experience has been GREAT! . . . Everyone that I have communicated with from the Society or that I have met through the regular zoom meetings has been super friendly and willing to help or share their indexing experience and advice. I never felt uncomfortable at any given time. I feel like I have met people that speak my language! A language that I never even knew about! . . . There are many stories that are out there that need indexers with diverse life experiences. There are many BIPOC authors who I am sure would love to hire indexers who see the world through the same lens because of their similar life experiences.”

“I think I have felt supported through the many conversations I have had with Siusan, and the meetings that I have attended. Both these sources of support have helped me take that leap into starting to index.”

Leah stated that “the free membership and opportunity to participate in all the meetings made a HUGE difference and kept me motivated and on track to take the Berkeley course” and



“everyone has been very openly supportive across the board and I haven’t sensed or heard any resentment about the opportunities made available through the program!”

Allan said, “It’s been a very supportive environment. I didn’t feel discriminated against for not being able to take full advantage of my membership or my lack of contribution. My first meeting with the local chapter was so pleasant and it was rewarding to meet the members and . . . discuss with them their experiences in indexing.”

#### **4. *Other things ISC/SCI could do to help you newcomers feel supported as indexers***

Sandra suggests “an opportunity to shadow a veteran indexer would be amazing. I personally learn very well when I observe how an ‘expert’ does the job. Job shadowing and mentoring are not the same thing. Also, I feel that the examples we are taught in the indexing courses are not enough.” She also thinks “the bursary is a great way to open up the world of indexing to people from diverse backgrounds. . . . I am not sure how you advertise it but I came across it by chance. I would have missed this opportunity. In terms of helping me, I think the Society and its members have already done plenty to help me navigate my entry into the indexing world.”

Leah said, “I already feel very supported, I must say!” “I do wonder if there is a system in place for moderation of the ISC and IDG lists if anything were to get out of control. Nothing has happened openly yet, but I do wonder how I would feel if I were an Indigenous indexer in particular, as we watch colleagues talk about some of the decolonizing standards. We might also want to make sure the information for contacting moderators is available; best to be prepared before anything happens.” And the ISC monthly chats are “such a wonderful opportunity to connect with people and were a huge motivating factor for me to get more involved. I wonder if the rotating chat leaders would consider automatically muting everyone’s mics and using a speakers’ list as a facilitation strategy.”

She also suggested some targeted outreach about the bursary and might assist with this if the bursary is offered next year to make sure the news is reaching many relevant communities. She also suggested considering ways to offset the additional business startup costs.

#### **Interim Conclusions**

After only one year, the experience to date is indicative of success but too early to be conclusive. We definitely have indications of interest and some positive results.

The bursary is on trend in the publishing industry as a concrete way to address systemic biases. Our bursary was one of the early movements in this direction. Books are being written by and about all kinds of diverse communities, and members of those communities have a role to play with authors and publishers. This need is heightened by the trend toward self-publishing. The bursary meets a felt need and introduces people from structurally disadvantaged backgrounds to the possibility of a career in indexing. It reaches people who might not even know they could become indexers.

To be successful, new indexers need some support, and as a Society our experience so far shows that we can easily provide that. It has also been shown that for under-represented people to feel comfort they have to “not be the only one.”



The bigger the exposure, the more knowledge of indexing gets out to diverse communities, and if we don't do something, people don't see indexing as an option. We need to get the word out more widely to reach potential indexers and get communities talking about it so more and more people find out about indexing. This is consistent with some of our outreach goals. ISC/SCI's membership list has grown by 7 people because of the bursary, at a time when membership in other indexing societies is dropping. Other benefits to the Society are less tangible. Any kind of outreach brings indexing clients to us. Outreach to our traditional communities and sources over the past 40+ years bring expected connections and work opportunities. But expanding our outreach to non-traditional communities and sectors means more exciting opportunities to grow our society and our indexing profession. Before looking at our recommendations, let's take a quick survey of the larger backdrop against which our bursary is offered.

## Related Diversity Bursaries

All of this is not in a vacuum but takes place in society as a whole.

It is difficult to find reliable statistics on the incidence of various communities in Canada. Perhaps the current census will help. From the 2016 census, 22.3% identify as a member of a visible minority, and the number is larger for younger Canadians. Of these, nearly 5% are Indigenous. Somewhere between 3.2 and 8% identify as LGBTQ2+, but there is a huge variance in self-reporting and what the categories include. Percentages of disabled people are similarly slippery. We do not have a survey of the membership of our or other indexing societies, but it's clear from meetings and gatherings that some or all of these categories are notably under-represented in publishing in general and indexing in particular.

There is a long history of bursaries for under-represented/marginalized communities. A quick search online gives you dozens of bursaries/scholarships from universities, government, corporations and other organizations in Canada. Some are: Concordia Community Action Fund, University of Toronto Graduate Community Development Fund, Access (library tech conferences), Government of Ontario Bursary for Students with Disabilities, Monash Queer Leadership Scholarship, Earthdance Falling Leaves Dance scholarship, etc.

TIDE reached out to one such organization – the Ottawa Community Foundation – and Janet Adams spoke of how specific their scholarships are and how they fit with the Ontario Human Rights Commission criteria. ISC/SCI's Diversity in Canadian Publishing Bursary also fits the criteria. Such bursaries are not only legal but necessary and encouraged.

*[See email from Janet Adams in Source B – Other Comments on Bursary]*

*[See <http://www.ohrc.on.ca/en/policy-scholarships-and-awards/exceptions>]*

## Editors Canada

Editors Canada just announced a yearly Equity Fellowship for editors who are BIPOC, 2SLGBTQIA+, neurodiverse and disabled. It provides extensive access and resources for to up to three successful applicants each year.

---

*“At a time when institutional racism, privilege and bias are at the forefront, Editors Canada has pledged to listen and to do better.” “Supporting people who have traditionally been excluded from our industry with this fellowship is one of the ways we are acting on that pledge.”*

---

[See <https://www.editors.ca/news/editors-canada-announces-new-equity-fellowship>]

## Myths about Affirmative Action

From the United States we found a list of 10 myths about affirmative action. These myths apply equally to diversity bursaries here in Canada. Here are two of them:

Myth 1: The only way to create a color-blind society is to adopt color-blind policies.

Although this statement sounds intuitively plausible, the reality is that color-blind policies often put racial minorities at a disadvantage. For instance, all else being equal, color-blind seniority systems tend to protect White workers against job layoffs, because senior employees are usually White (Ezorsky, 1991). Likewise, color-blind college admissions favor White students because of their earlier educational advantages. Unless preexisting inequities are corrected or otherwise taken into account, color-blind policies do not correct racial injustice – they reinforce it.

Myth 3: Affirmative action may have been necessary 30 years ago, but the playing field is fairly level today.

Despite the progress that has been made, the playing field is far from level. Women continue to earn 77 cents for every male dollar. Black people continue to have twice the unemployment rate of White people, twice the rate of infant mortality, and just over half the proportion of people who attend four years or more of college. In fact, without affirmative action the percentage of Black students at many selective schools would drop to only 2% of the student body. This would effectively choke off Black access to top universities and severely restrict progress toward racial equality.

[See <https://secure.understandingprejudice.org/readroom/articles/affirm.htm>]

## Diversity in Publishing

In 2018 the Association of Canadian Publishers (ACP) did a Book Publishing Diversity Baseline Survey. They note a disconnect between policies and action in diversity initiatives. We began our journey on this question in 2017/2018, which puts us a bit ahead of the curve in relation to the growing movement of inclusion within the publishing industry. Some organizations in the Book & Periodical Council have begun taking stronger steps to address the imbalances, such as the Editors Canada bursary mentioned above and training for boards.

---

*ACP and its publishers recognize that contributions from professionals from diverse backgrounds are important at all stages of a book's path to publication, from acquisition to indexing to sales and marketing. With respect to post-production, different lived experiences and knowledge can be applied to a book's content and strengthen a project overall, ultimately increasing its relevance to readers.*

---

[See <https://publishers.ca/wp-content/uploads/2019/04/FINAL-2018-Diversity-Survey-Summary-Report-ACCESSIBLE.pdf>]

+++++

From the *Anti-Racism Toolkit for Allies* from George Washington University Ethics in Publishing conference 2020:

---

*Racism is pervasive in scholarly publishing. While we who work in scholarly publishing could think of exceptions to this statement, a recent survey of our industry shows that most Black, Indigenous, and People of Color (BIPOC) in scholarly publishing experience both covert and overt racism at work. The anonymous quote above, drawn from the powerful testimonies by People of Color published in the Scholarly Kitchen, gives us an indication of the considerable amount of work that our industry needs to do to address issues around race, racism, inequity, and bias. It is clear that racism negatively impacts the day-to-day well-being of our BIPOC colleagues while likely having longer-term effects on their career trajectories.*

*Those of us who work in higher education, whether within university presses or elsewhere, can easily slip into feeling as if such "progressive spaces" are havens from racism and other isms. It sometimes feels like we can let down our guard within these spaces and expect to find an absence of bias. But is that really the case? Yes, it's true that Confederate flags and other symbols of*

*white, nationalism are largely absent. And there is typically an understanding that racial slurs or racist jokes are unacceptable. The truth is, however, that even progressive white spaces perpetuate white supremacy culture in ways that are hard to identify without intentionality and hard work.*

*Addressing racism and a lack of diversity is crucial not only for workers within our industry but also for our authors, our readers, our reviewers, and our community more broadly.*

*Intentional change to workplace culture is essential to attracting and retaining BIPOC applicants. Too often, we put the burden on marginalized groups to “bring the diversity” to an organization while failing to consider what will make our spaces feel welcoming and safe to BIPOC employees. Will they be the only BIPOC employee in most meetings? Can staff—but especially marginalized staff—be their true, authentic, and wholly embodied selves? Are there common linguistic and cultural frameworks that enable microaggressions to be identified and addressed directly? Do BIPOC staff have access to mentors and safe, affirming spaces? Do BIPOC staff have professional development opportunities? *If we are not creating an equitable working environment where BIPOC staff can thrive, the effort put into pipeline programs and recruiting efforts will be fruitless, replaced by challenges with retention and a staff make-up that continues to be overwhelmingly white.**

---

From “Words Matter: Copyediting as a Process for (or Against) Social Change” by Kavita Das:

*Conversely, the lack of editorial diversity affects work by marginalized writers. “If you have a lack of familiarity you’ll go in with a lot of preconceived notions that can weaken the work rather than strengthen or enhance the consistency within it,” says Jennifer Baker. “The more publishers aim to publish more representative books without having the staff on hand who have that awareness, the more the work is forced into another viewpoint rather than being able to flourish in its originality.”*

---

[See

[https://www.pw.org/content/words\\_matter\\_copyediting\\_as\\_a\\_process\\_for\\_or\\_against\\_social\\_change](https://www.pw.org/content/words_matter_copyediting_as_a_process_for_or_against_social_change)]

+++++

In 2019 TIDE interviewed Dr. Funké Aladejebi about barriers she found when doing research for a dissertation on Black women educators. TIDE asked what qualities would make an index truly helpful for her research.

---

*Finding aids that list details on a variety of subjects that pertain to life in Canada and expand on categories of immigration and labour, to include subjects such as community building projects and local activities are incredibly helpful. I also believe that helpful indexes are ones that have been created in close consultation with and collaboration from community members. This allows for local histories and knowledges to be part of the archival experience.*

---

TIDE also asked about recommendations that archives or libraries should be doing to remedy findability issues.

---

*I believe integrating a stronger focus on anti-racist and anti-colonial frameworks into archives and libraries can significantly remedy accessibility issues. Hiring diverse curators and archivists from a variety of communities can give space and a critical lens for conceptualizing the various intersectional experiences of Black life in Canada. These multiple perspectives can include categories of class, religion, and race, but also speak to gendered notions of belonging that characterized and informed the experiences of diverse Canadian communities.*

---

What better way to enact these collaborative recommendations than to have indexers who reflect their diverse communities?

[See Bulletin Volume 41, Number 3, Fall 2019]

+++++

In the summer of 2020 ISC's Paula Butler presented a webinar on "Caring about Equity, Diversity and Representation: A conversation on ethical dilemmas and best practices for

indexers and the indexing community.” The second half of the presentation focused on systemic racism and white supremacy.

Slide 18 was an Association of Canadian Publishers statement from June 3, 2021:

---

*“In Canada, according to a recent ACP study, only 3% of paid positions in the Canadian publishing industry are held by Black people and only 18% by BIPOC. This lack of fair representation of Black and other racialized editors, designers, publicists—indeed across all roles in publishing—reflects the longstanding and urgent need for active and accountable change in the Canadian publishing industry at every level.”*

---

Slide 20:

---

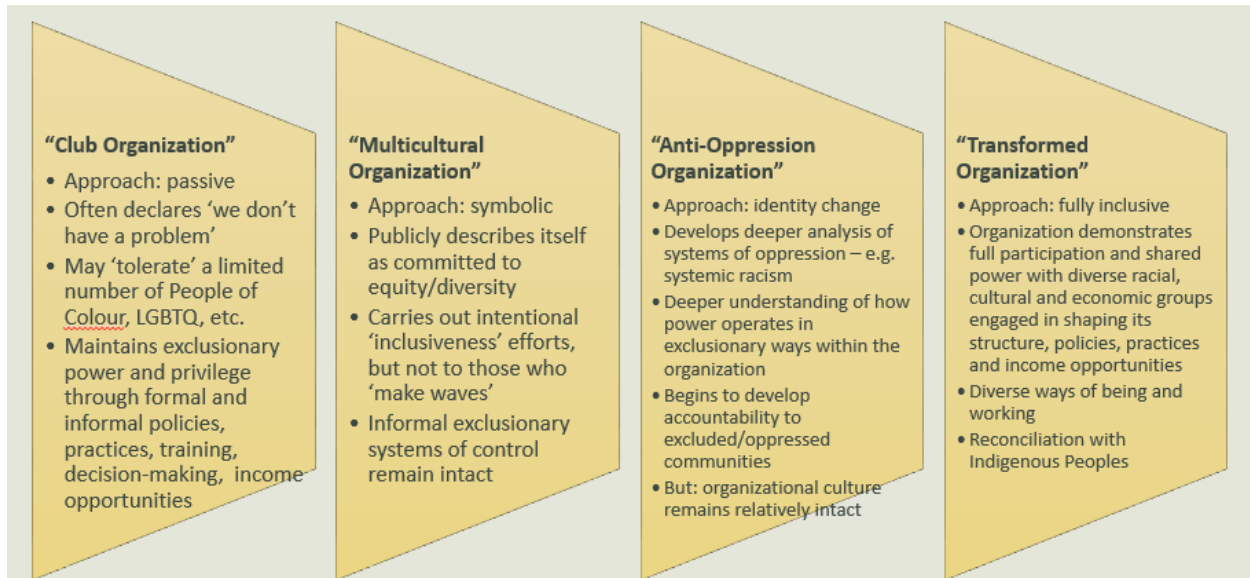
**Are there hidden or systemic barriers to indexing as a field of work experienced by indexers whose identities differ from the dominant (white/female) profile?**

**Is someone who might make a great indexer being unfairly excluded from this field of work, or subtly made to feel out-of-place or unwelcome?**

**Is someone losing access to income from indexing?**

---

Slide 24 of her presentation shows how organizations shift from a “club” of people with similar interests to a “transformed organization.” We do not regulate our members, are run by volunteers, and have very little organizational hierarchy, but it’s still a helpful way to reflect on this area.



[See <https://indexers.ca/resources/news-and-articles/caring-about-equity-diversity-and-representation/>]

## Diversity and Racism in Publishing Stories

These personal stories are taken from the BIPOC in Publishing in Canada group’s newsletter and the article “You Will Be Tokenized: Speaking Out About the State of Diversity in Publishing” by Molly McArdle in *Brooklyn Magazine*. They show the emotional impact of racism and heterogeneous publishing organizations, which is often totally invisible to the dominant publishing culture.

---

*I left a job because I had a boss talk to me in a fake Indian accent as a joke. [At previous workplaces] I had a colleague call me uppity. I’ve had the texture of my hair criticized. [Racism and lack of diversity] is a conversation that I’d like to have white people talk about with other white people. People of color get called on to talk about this all the time. At least for me, it’s very painful and very private. Parul Sehgal*

*If you don’t have that mentorship and that guidance, you feel very isolated. That can exacerbate you wanting to leave. Instead of moving up the chain, I was staying in the same place. My friends of color are not getting mentors. They are thinking about other careers. I can’t guarantee I would have stayed in the industry without my mentor. The problem I had with that Penguin*



*Random House in the UK removing the university requirement for job applications was that no one was looking at the issue of bias. Looking at anti-racism classes for their employees. Really looking at what the barriers are. People are throwing quick fixes at it. Jenn Baker*

*I've been fairly certain that in any room I walk into I'll be a part of the majority group—white women—and that we will have had, generally speaking, similar lives: middle class upbringing, liberal arts education, etc. It's impossible that the warm reception I've had into the industry, the ease of rapport that developed early with people in my cohort that evolved into a professional network, isn't in some way related to that. When I have walked into a room that was mostly comprised of publishing professionals (not, for instance, a reading or something where it's more open to the public/the artists are present) that was NOT 90 percent, or higher, white women, I've noticed.*  
*Meredith Barnes*

---

From the BIOPOC in Publishing in Canada newsletter:

---

*More broadly in the industry, we've seen that Diversity & Inclusion (D&I) committees are being formed, there has been talk and announcement of mentorship projects geared towards marginalized communities, and open calls for submissions from these same communities. That is forward movement to a certain degree, but conversations with BIPOC in the industry have reinforced the same point we were trying to get across last time—there needs to be drastic change in thinking and a fundamental deconstruction of the systems within which we exist and work in publishing. At the moment, there is the impression that while the conversation around systemic racism in publishing was brought to the forefront this summer, the industry is gradually and surely drifting back to a state of apathy and the important discussions that were started have halted or fizzled out. Now that the industry has acknowledged its shortcomings, is it simply going back to 'the way things were,' or will there be serious efforts to rectify this?*

*This is the reality of day-to-day experiences for BIPOC in this industry: constantly explaining "where you're from" every time you meet someone or start a new job; being told we exist in a "post-racial world" despite all the evidence of your career trajectory in the industry pointing to the contrary;*



*being told that because you, one person of colour in the team (often in the whole company), 'made it' that the industry can't possibly be systemically racist; being expected to educate your white colleagues and act as the spokesperson for all people of your background or sometimes even BIPOC as a whole; essentially: having to justify your humanity to the people who are supposed to be on the same team as you, over and over again. We should not have to constantly unpack our trauma for our white colleagues to understand how hard it is for BIPOC to be in this industry. And yet, here we are. This is what it means to be a racialized person in this industry.*

*Despite our best efforts, the allyship we continue to see in this industry is largely performative. White people seem to be more invested in policing how we as BIPOC express our concerns and share our experiences, presenting an outward facing image of listening and learning (while often demanding additional emotional labour from their BIPOC employees internally), and acknowledging the realities of racism but failing to see the ways in which they themselves are enablers and creators of systemic oppression. It is disappointing, exhausting and truly soul-crushing to see this business through our eyes.*

*If you're feeling like we are being too tough, like you have "grown" and learned, we're here to say: that's still not enough. At our events, the conversations often come back to this central question—what next? Structurally, systemically, there is nothing more we can do as marginalized people or as a collective to create change; we did not create this system and it's up to those with that power to tackle this, genuinely, with sincere efforts to unhaul the system, not the performative attempts to cover up the issues that we've seen so far.*

---

*[See Source C - Diversity Stories]*

## Going Forward

We want the ISC/SCI Diversity in Canadian Publishing Bursary for new indexers to have a chance to make a real impact on the indexing community. TIDE believes a commitment of at least five years is needed to be able to judge how successful the bursary is.

Don't forget the **rule of seven** in marketing, which simply says that a prospective buyer should hear or see your marketing message at least **seven** times before they commit to purchase. This principle also applies to our bursary. Just because someone may see an email or a posting

doesn't mean they are going to immediately apply or forward to friends and colleagues. First they have to develop trust in the opportunity. Leah Horlick, one of our 6-month trial winners, mentioned trust in her story.

We also want to make sure the bursary is not a token gesture, with only one under-represented person "allowed entry" each year. It has been shown that when opening homogeneous groups to a more diverse population new people need support to stay on and not feel marginalized. TIDE has taken this to heart and believes the additional free 6-month trial offers are one way to do this and help all around.

We've already seen progress in terms of our bursary winner and 6-month membership trial winners. We've seen how our bursary announcement has piqued the interest in people who had never thought of indexing as a career, and never thought about indexes in general. Many of these people have the building blocks for a successful indexing career.

Racism, ableism, homophobia and white supremacy have been the norm for hundreds of years. It is going to take a lot of hard work and dedication from the people who have privileges to change the systems. TIDE encourages the executive to dive deep into these issues and take cues from people who are most impacted.

Therefore, TIDE recommends:

1. We continue the bursary for at least three more years.
2. We continue to offer 6-month trial memberships for a small number of applicants per year.
3. We continue to determine ways to evaluate the bursary effort.
4. We continue to consciously open the Society to a diverse membership.

---

*2021 05 08 Reminder of Question re Freelancer Union from Member*

***Possible agenda item – protection and benefits for our members***

In light of the fact that 3 of 20 people who were at the chat today had had trouble with collecting on at least one index, Sergey would like us to consider the Canadian Freelance Union. I also had a similar experience when I was freelancing earlier in my career, for more money (\$10,000) and I was never able to collect. Should we consider recommending this option?

It looks like individuals join, not the society, for \$125. It's a business expense but not considered union dues because there's no collective agreement.

**FROM SERGEY LOBACHEV:**

In the light of the yesterday's discussion concerning Susan's experience with American publisher, I support her idea of exploring the possibility of joining Canadian Freelance Union. I myself in the middle of the struggle with RBC bank, which has lost a check from my client, and chances are I will be pursuing with legal actions.

Anyway, the benefits look attractive - <https://www.canadianfreelanceunion.ca/join>

Alternatively, there is an opportunity of collaboration with Editors Canada. I believe Editors have access to legal advice and to health benefits. Can we join them for an additional fee, and have the same access? This is just a thought, but we have members of Editors among us, and they can share advice on this matter.

**Discussion: What can ISC/SCI do to help members who are having problems getting paid.**

---

*2021 05 08 Communications Procedures in General*

In the process of developing a procedure for communications for the Ewart-Daveluy Award Panel, I realized that the procedure may be of use in general.

Committees that could use this include the following:

- Ewart-Daveluy Award: call for nominations, deadline reminder, winner announcement
- TIDE/Diversity Bursary: application open, deadline reminder, winner announcement
- Conference Committee: save the date, registration open, early-bird deadline reminder
- President/Tamarack Award: winner announcement

Here is the suggested procedure:

- Get the generic press release or announcement from the communications director.

- Add the unique information and send to either the executive committee liaison for review or put into the Board/For Review folder and ask the executive committee to review it.
- If translation needed, and after review, either directly (if chair is on the executive committee) or indirectly (via the executive committee liaison if no one on the committee is on the executive committee) send the document (unique part only) to [editeur-francais@indexers.ca](mailto:editeur-francais@indexers.ca) and ask for translation.
- Then, send the English (and French) press release to the following:
  - [membership@indexers.ca](mailto:membership@indexers.ca) (for emailing to members)
  - [admin@indexers.ca](mailto:admin@indexers.ca) for posting on the website
  - [Bulletin\\_editor@indexers.ca](mailto:Bulletin_editor@indexers.ca) (for inclusion in the next issue)
  - [communications@indexers.ca](mailto:communications@indexers.ca) (who will send it to their external list after the members have the news)

Some of the places that communications sends the information to include some or all the following:

- Other indexing societies
  - international liaison for ICRIS: [international\\_liaison@indexers.ca](mailto:international_liaison@indexers.ca)
  - Gwen at ASI office: [info@asindexing.org](mailto:info@asindexing.org)
  - Editor, ASI newsletter: [SeeAlsoEditor@asindexing.org](mailto:SeeAlsoEditor@asindexing.org)
  - Key Words editor: [keywords@asindexing.org](mailto:keywords@asindexing.org)
- Other societies in publishing
  - BPC rep for BPC: [bpcouncilrep@indexers.ca](mailto:bpcouncilrep@indexers.ca)
  - Editors Canada: [president@editors.ca](mailto:president@editors.ca); [executivedirector@editors.ca](mailto:executivedirector@editors.ca); [communications@editors.ca](mailto:communications@editors.ca)
- Then the rest of the world
  - Facebook, Twitter, LinkedIn: [jessklaassenwright@gmail.com](mailto:jessklaassenwright@gmail.com)
  - Michelle Ou for Editors Canada newsletter: [michelle.ou@editors.ca](mailto:michelle.ou@editors.ca)

Discussion

Thoughts? Does anyone see any problem with this? Does it make sense?

---

*2021 05 08, Knowledge Management Committee*

Judith Clark mentioned that a knowledge management plan might be a good idea for organizing all the written material that we are gathering.

From Wikipedia: *Knowledge management (KM) is the process of creating, sharing, using, and managing the knowledge and information of an organization. It refers to a multidisciplinary approach to achieve organisational objectives by making the best use of knowledge.*

The Society has lots of committees working on projects and has high executive committee turnover. Up to now, we have just been working on keeping documents in Dropbox and using generic email addresses for continuity.

I believe a cohesive plan for how to manage all our information . . . what to save, where, how, and by whom . . . will save the Society time in the future and make things easier for all the volunteers.

Marco de Petrillo answered the call for volunteers. He has taken a course in knowledge management, though he believes himself to be rusty. I have asked Judith Clark to join the committee in an advisory capacity.

***For discussion***

I suggest that Marco be allowed to see the names of all our files and folders and be allowed access to most of them. I suggest that Marco and I work on a plan (with Judith's advice) and bring it to the executive committee for approval.