



INDEXING SOCIETY  
OF CANADA

SOCIÉTÉ CANADIENNE  
D'INDEXATION

**Annual Report, 2021–2022**

**June 11, 2022**

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# About the Association

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

Our mission is to

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

Our vision is "Accessible information; informed people."

## **Awards**

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

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

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

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

## **Events**

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

Our regional groups host meetups every other month, alternating with national video chats.

## **Find an Indexer**

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

## **International Committee of Representatives of Indexing Societies (ICRIS)**

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

## **Membership**

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

## **Communications**

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

## **Executive Committee, 2022–2023**

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Co-president	Alexandra Peace
Co-president	Jason Begy/Tere Mullin
Membership	Julia White
Treasurer	JoAnne Burek
Communications	Judith Clark
BC Regional Representative	Lisa Fedorak/ Matthew MacLellan
Prairies and Northern Regional Representative	Liese Achtzehner
Central Regional Representative	Ronnie Seagren and Jolanta Komornicka
Eastern Regional Representative	Tere Mullin / TBD
<i>Bulletin</i> Managing Editor	Vicki Gregory
Website Administration	JoAnne Burek/ Christine Dudgeon

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## **Appointed Positions**

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International Liaison	Margaret de Boer
Recording Secretary	Carlisle Froese/ Patti Phillips

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# Reports from the Executive Committee

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## Co-Presidents (Alexandra Peace and Tere Mullin)

### **Alexandra Peace**

Folks, knock on wood, but the Society is doing well ... membership is up, savings are up, and we have added a few more programs this year! You will be happy to read about the New Indexers Resource Centre (NIRC) and the member-initiated groups (MIGs) in this report, along with reports on all our regular committees.

It was a pleasure to work with Jason Begy as co-president. We worked well together. However, he had the opportunity to take a full-time job, and so had to resign as co-president. We wish him success in his new position!

Tere Mullin has agreed to serve as co-president, for which I am eternally grateful. She and I have been happily working together for several months now.

ICRIS has started meeting twice a year by Zoom. Our Society initiated this and hosted the first two meetings. The Society of Indexers took over this spring. It is fantastic to feel part of the larger community and learn about other societies. The representatives will all meet in person this fall in Berlin, and I'm sure you will be happy to hear about it from our rep, Margaret de Boer.

I somehow got drafted to chair a working committee on the ICRIS/Indexer website. There were some very lively discussions. The members agreed in principle to an external website that each society can point to with a list of all the indexer locator pages, some info on ICRIS and *The Indexer*.

We have welcomed several people to the executive committee and several people have switched positions! You will see that Carlisle Froese has moved from recording secretary to coordinator of the Mary Newberry Mentorship Program; Patti Phillips will be taking over as recording secretary. To the executive committee, we added Christine Dudgeon as website administrator (this was one of the jobs that JoAnne Burek had been holding down!), Matthew MacLellan took over from Lisa Fedorak as BC rep, and Jolanta Komornicka joined Ronnie Seagren as Central (Ontario) rep as that region has lots of people and we felt justified two reps working together.

One of the next big projects that the executive committee is discussing is education/communication: for/to publishers, authors, other publishing professionals and teachers, and the general public. If you have views on this, do let us know!

And, of course, us. Editors' forums and webinars are flush with discussions about changes in language. How do we learn about them? Watch the *Bulletin* for more discussion on this topic (and, well, on lots of topics, grin).

As always, I am in awe of the volunteers that run this Society. There are a lot of you, and you do amazing things! Just glancing through this annual report shows the breadth and depth of what is going on. If you are happy with what someone is doing, please remember, you can send them a Magpie Kudos!

### **Tere Mullin**

Having joined Alexandra Peace as co-president in March of this year, I'm enthusiastic about growing into my role. Although I have much to learn, for now I hope that I can be of help to Alex by lightening her schedule somewhat.

I've taken on a few tasks such as compiling our letter to this year's Tamarack Award recipient, and purchasing the tamarack bird; I've sent out this year's letter to the TIDE bursary winner, and I've been working on checking off some of our to-do list items, such as creating committee summaries.

We've been invited to participate in a community research project with King's University, and I am taking the lead in coordinating this. We discussed the opportunity as a collective at the executive meeting on April 23, and I am scheduled to meet with the program's coordinator to proceed with the project.

As I transition into being co-president, I feel very fortunate to have Alex Peace as a mentor. I can only aspire to fill her (very large) shoes someday!

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## **Membership (Julia White)**

Since the last AGM report, membership numbers have risen to 135 from 124, representing an 8.9% increase. Excluding honorary memberships, the number of members rose 5.1%.

Among the provinces, Ontario and New Brunswick were tied for the largest absolute increase in members, with a rise of three members each.

In percentage terms, the largest increase was seen in New Brunswick, which quadrupled its membership to four in 2022, up from one in 2021. In addition, the number of members increased 66.7% in both Saskatchewan and Nova Scotia.

Membership numbers declined somewhat in British Columbia, Alberta, and Newfoundland.

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

	<b>April 2022</b>	<b>May 2021</b>	<b>May 2020</b>
<b>Totals</b>	<b>135</b>	<b>124</b>	<b>108</b>
Canada	111	103	91
International	24	21	17
<b>Paid Memberships</b>			
Basic Individual	39	32	28
Listed Individual	74	72	67
Student	2	2	3
Institutional	8	11	7

## Honorary Memberships

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Emeritus	4	3	3
TIDE Bursary	3	2	0
Basic Trial	5	2	0

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This year the Membership Secretary

- Worked with colleagues on the ISC/SCI Rates Survey and helped present the survey results to members in a webinar
- Maintained and updated the Membership Secretary Manual
- Maintained the membership lists for the Society
- Maintained the isc-l and the executive list-servs
- Served on ad hoc committee to create ISC-l forum email guidelines and FAQ
- Liaised with SI regarding mail delivery, and digital access of the *Indexer*
- Assisted individual members with their queries, or forwarded those queries to the appropriate executive member
- Attended executive meetings via Zoom
- Sat in on national members' video chats

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## Treasurer (JoAnne Burek)

### Executive Summary

In the fiscal year ending March 31, 2022, the Society had an income of \$25,820, of which \$7,705 was attributed to the 2020 and 2021 conferences and \$18,115 to operating revenues (membership fees, Find an Indexer fees, Ewart-Daveluy Award nominations, mentorship program fees, and interest).

Total expenses were \$16,419 for ongoing operations, \$1,553 for the TIDE bursary, and \$723 for the advertising on the webpage for Congress 2021 on the Federation for the Humanities and Social Sciences website. In the \$16,419, we incurred \$8,770 related directly to membership. This consists of \$8,221 for *The Indexer* subscriptions and \$549 for credit card fees for membership payments. Other large items include the *Bulletin* at \$990, the website and listserv at \$1,072, and the 2021 conference expenses of \$3,696.

One type of expense that we've been avoiding since the pandemic is travel. This includes executive travel, the international liaison's travel to other society conferences, and the rental of a meeting room that the executive committee would use if we were having an in-person conference.

Offsetting the expenses avoided, we started incurring new ongoing costs, One is a paid subscription to Dropbox, as that's where we keep all our documentation and we've outgrown our free subscription. The other is website plugins to support new functionality and improved security.

As a result of foregoing the travel and meeting room expenses and incurring new service expenses, we had an operating profit of \$5,321 on our \$18,115 operating revenue. (You can find this detail on the ISC/SCI Budget under the "Actual 2021–2022" column.)

As shown on the Profit and Loss statement, which completes the picture by including the conference profit of \$4,009 and the \$2,276 paid out for TIDE bursaries and the ad, we finished the year ahead by \$7,054.

The balance sheet remains strong with \$38,612 in cash and \$13,801 in investments, for total assets of \$52,413.

### ***Proposed Budget***

This year, the budget includes travel costs and in-person meetings. Our expected profit from ongoing operations is much closer to break-even at \$1,794.

Under Extraordinary and Special Projects costs, the Executive Committee voted unanimously for projects and activities amounting to \$6,750 for the year. These include running another ad, although we will first try to evaluate the success of the 2022 ad. It also includes funds for translations of web pages as we aspire to make our website bilingual. And it includes funds to build up and organize our archives, to support TIDE projects, and an allowance of \$2000 for new projects.

### ***Highlights 2021–2022***

**First Quarter (April to June 2021):** Compilation of fourth quarter and year-end 2020–2021 financial statements as well as 2021–2022 budget preparations. After the books were closed on March 31, with executive approval, I moved the bookkeeping off Quickbooks and onto Gnucash, an open source accounting system. This move avoided the 100% price increase in the Quickbooks subscription while simplifying the accounting process. The new system is working very well.

**Second Quarter (July to September 2021):** Preparation and posting of 2nd quarter financial statements.

**Third Quarter (October to December 2021):** Preparation and posting of 3rd quarter financial statements.

**Fourth Quarter (January to March 2022):** Preparation and posting of 4th quarter financial statements.

**March and April 2022:** Compilation of 4th quarter and year-end 2021–2022 financial statements and the 2022–2023 budget.

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

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## ***Communications (Judith Clark)***

### ***Other Press Releases and Announcements***

- Post-AGM new executive committee: Sent out a press release to the distribution list and a short version for social media. [as of 9–25–2021]
- Sent announcement of change in co-presidents to external contacts. Also requested social media posts. [April 2, 2022]

### ***2022 ISC/SCI Conference***

- A session speaker announcement was sent to the distribution list. A social media posting request re: conference session speaker was sent. [March 14, 2022] also [March 23, 2022]
- Multiple social media posts over end of March and April 2022 advertising speakers/topics.
- Save-the-date announcement sent to distribution list and to Michele Ou for the editors.ca newsletter [February 2, 2022].
- Open registration announcement sent to distribution list and to Michele Ou for the editors.ca newsletter. Also a social media posting request was sent [February 24, 2022].
- ISC/SCI 2022 Annual Indexing Conference keynote speaker sent per Communications procedures to distribution list recipients and social media. [as of 9–25–2021]



### ***Ewart-Daveluy Award for Excellence in Indexing 2022***

- Final reminder sent to distribution list. Social media posting request sent. [February 27, 2022]
- Sent out English and French versions of the Call for Submissions: ISC/SCI Ewart-Daveluy Award for Excellence in Indexing 2022 to distribution list. Requested social media postings as well. [November 15, 2021]
- Ewart-Daveluy 2021 award: Press release sent to distribution list. [as of 9–25–2021]
- Ewart-Daveluy 2021 award: Sent editors.ca text for newsletter. [as of 9–25–2021]
- Ewart-Daveluy 2021 award: Requested social media posts and sent Jess content to go on the platforms. [as of 9–25–2021]

### ***NIRC (New Indexer Resources)***

- Announcement sent to external list. [March 16, 2022]
- A social media posting request was sent. [March 16, 2022]

### ***Diversity in Canadian Publishing Bursary***

- Sent out an English press release for the winner of the 2021/2022 Diversity in Canadian Publishing Bursary Award and requested social media postings. [November 29, 2021] Sent editors.ca contact short announcements (under 100 words) with a link to the full articles (French and English) on indexers.ca. [December 6, 2021]
- Diversity in Canadian Publishing Bursary: Sent out a release about the 2021 winner per Communications procedures to stake-holders, including distribution list recipients and social media. [as of 9–25–2021]
- Diversity in Canadian Publishing Bursary: Sent out a release about the 2021–2022 call for applications to the distribution list. Social media reminder posts submitted to Jess for posting. [as of 9–25–2021]

### ***Student Letter***

- Sent letter on October 30, 2021 and updated records in student letter folder.

### ***Tamarack Award***

- 2021 Tamarack Award recipient information sent per Communications procedures to distribution list recipients and social media.

### ***BPC Website***

- Placed a list of changes to be made to the BPC website information about ISC/SCI into the BPC rep's folder in Dropbox and notified rep. [as of 9–25–2021]

### ***Isc-I Ad Hoc Committee for Forum Guidelines and FAQ***

- Served on ad hoc committee to create ISC-I forum email guidelines and FAQ. [spring 2022]

### ***Possibility of Social Media Campaign***

- Alex and Tere had an idea for a possible social media campaign, based on a promotional ad for another organization.

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## *British Columbia Region (Lisa Fedorak, Matthew MacLellan)*

Our meetings in the past year have given us the opportunity to discuss a wide range of topics.

We reflected on the annual ISC/SCI conference, quoting on texts, reviewed an index by a member of the Society, and also enjoyed open discussion time with each other.

In addition, at the meeting in October we hosted Heidi Waechtler, who spoke to us about distribution issues in publishing and how these have been affected by the pandemic. Heidi seemed genuinely interested in our perspective on industry as indexers.

### **Membership**

Our membership composition has changed over the past year, and we have been glad to meet runners-up from the TIDE bursary program at our regional meetings.

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## *Prairie and Northern Canada Region (Liese Achtzehner)*

The number of indexers has grown in the Prairie and Northern Region, with new members from Canada and the United States.

I held regional meetings over Zoom in August, October, February, and April. Early in my tenure as a regional representative, I sent out a form to gather information about people's availability. I have scheduled meetings on different days and at different times, with the idea that we might attract a wider variety of participants. We've had relatively good attendance at the meetings, with around five people attending each one. These meetings have been informal in nature.

I have been happily surprised by both the enthusiasm and dedication of my fellow volunteers, and the collaborative and helpful attitude of our members. I look forward to continuing in this role for the next year, and beyond that with the ISC/SCI in some capacity.

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## *Central Region (Ronnie Seagren and Jolanta Komornicka)*

Jolanta Komornicka joined Ronnie Seagren this spring as co-representative for the region. Our members decided to meet monthly rather than bimonthly. Our list includes seventy-six people in Ontario, ten beyond Ontario, plus the regional reps. Most meetings this year were around nine or ten on Zoom, except the in-person September meeting outdoors. Going forward, we have discussed alternating in-person and Zoom meetings, depending on COVID-19 concerns and the weather.

**April 2022:** We started with a conversation on computer indexing and embedding, leading to a discussion of Duncan's *Index*. We discussed the possibility of inviting an Indigenous editor who Ronnie heard speak for Editors Toronto, Kaitlin Littlechild, or possibly Rhonda Kronyk. We will follow up with Matthew and TIDE about the possibility of a webinar.

At the May meeting we will discuss Mel Gee's updated presentation from the Society of Indexers (UK) conference about indexing the metatopic. She will offer a very detailed handout showing different ways to handle the metatopic. Members will get it in advance so they can come to the meeting with thoughts and questions.

**February and March 2022:** These two meetings used the [NISO Criteria for Indexes](#), from the [American] National Information Standards Organization, as a lens to look at indexing practice.

In February, section 8 of the standard provided a jumping-off point for a very lively and detailed discussion of outdated terminology, glosses and qualifiers, word order and inversion, names, titles of works, unruly locators, and more. A lot of these conversations centred on the question of audience vs author and reflecting the text vs educating the reader.

In March we continued with section 9, discussing our own issues and experiences brought up by the topics in the standard. At the end of the meeting datejje discussed her ambitious project to index the contents of the Colored Conventions Project dataset, a nineteenth-century organization led by Frederick Douglass to organize for freedom from slavery and became the NAACP.

**January 2022:** We had an animated discussion on Zoom after a break for the holidays. We had all kinds of indexers there, from someone just starting the Berkeley course to people who've been indexing for over twenty years, so there was lots to talk about. The meeting focused on a number of aspects of running an indexing business, as well as indexing issues such as effective ebook indexes, run-in versus indented style, working with publishers, and ways to learn indexing beyond the courses.

**October 2021:** We started off talking about our favourite indexes and ended up with a wide-ranging conversation about how we handle a range of tricky indexing issues. We examined changing practices in indexing, such as how certain equity issues are treated historically and currently. What is our role to represent both what the author discusses and a current perspective? What is authenticity? Relevant references are the *Conscious Language Toolkit* developed by Crystal Shelley (@redpenrabbit), the *Elements of Indigenous Style* by Gregory Younging, as well as Rachele Kanigel and Rhonda Kronyk.

CIEP and publishing training centres are offering courses in sensitivity editing. One question was whether to index women in a book about gay men in post-war Berlin. We also discussed how to handle the index of an updated edition of a book.

And we weren't done yet. To what extent does plain language apply to academic editing and indexing? Would we use cross-references both ways? A researcher might go into the index to look up specific concepts, but the meaning should be available to many readers as well. The Book and Periodical Council is offering a basic nine-week course on Publishing 101 in Canada.

**September 2021:** Nine of us were delighted to be able to meet in person for the first time since the pandemic started at Little Norway Park in the Harbourfront area in Toronto right on Lake Ontario. The conversation was lively, as usual. We all told stories about our experience and work during the COVID times. New member Jolanta Komornicka explained how she was teaching a course on the plague just as the pandemic. And Margaret de Boer presented Siusan Moffat with the Tamarack Award for outstanding service to ISC/SCI through her work with TIDE and starting the bursary!

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## Eastern Region (Tere Mullin)

On **August 18<sup>th</sup>**, I held my first regional chat. We had a great turnout, and a lively discussion around Alex's index that she volunteered for critiquing. We also discussed the ISC/SCI 2022 conference, and attempted to gauge members' preferences with respect to the format of the conference. One of our members also brought a question about taxes.

We also welcomed two new members to the Eastern region this quarter: Vivian Unger (from New Brunswick), and Kevin Keys (from Nova Scotia). Vivian was an ISC/SCI member previously, and Kevin was new to ISC.

We held our bimonthly regional chat **October 20<sup>th</sup>**, and had a great turnout. We held another index critique, and we also discussed cross-references from subheadings and office set-up. This month again, attendees included someone from another region (Judi Gibbs, BC) and someone joining us internationally (Samuel Arnet, Switzerland).

We held our Eastern region chat **December 15<sup>th</sup>**, where we shared our favourite indexing tricks, tips, and resources. New member Natanya Belle de Smit has joined ISC/SCI, and she is from Pointe Claire, Quebec.

Our chat on **February 16<sup>th</sup>**, featured guest speaker, Do Mi Stauber. Do Mi graciously agreed to share her time with us and took questions about a chapter from her book, *Facing the Text*. We had a big crew, with several guests from other regions and a couple of non-members.

This winter/spring, we welcomed four new members! Mercedes Brian from NS, Greg Fisher who is in Montréal, Caitlin Christie in Fredericton, NB, and Gavin Goodwin, in Sackville, NB. We lost one Eastern member, Kevin Keyes, who has decided not to pursue indexing.

Our last regional chat was April 20<sup>th</sup>. I have moved on from my role as Eastern region representative. Alex and I hosted the meeting, and it was a lot of fun. We welcomed two of our new members, Caitlin Christie and Gavin Goodwin, both joining us from New Brunswick. We talked a bit about NISO standards, raising rates given the current economic climate and how people approach this with clients, and about what we listen to when we index. We learned that people who do not hear voices when they read are more likely to be able to concentrate while listening to music.

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## Bulletin (Vicki Gregory)

Since the last AGM, we have successfully published three more *Bulletin* issues and received positive feedback. The publishing steps (acquisition, editing, layout, proofreading) work very smoothly thanks to the enthusiasm and excellent work of each volunteer. I'm very grateful to all the team members who make these issues possible and the writers who send in fantastic content.

This year has brought efficient improvements to the proofreading process as well as a new proofreader to the team, Jolanta Komornicka. Future issues will include a new feature, more information to come.

At this time, the summer issue is in the works and will include coverage of the ISC/SCI conference (thank you Matthew MacLellan!). We welcome all suggestions and article ideas for future issues.

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## Website Administration (JoAnne Burek, Christine Dudgeon)

### JoAnne Burek

Website administration includes maintaining user access to the website, adding, and editing website content, and supporting the website's functionality. It also includes managing our 40+ emails with the @indexers.ca domain, maintaining access to our Dropbox folders, and managing access to our Zoom and social media accounts.

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

### ***New Website Functionality and Security***

- **Event Calendar** As we continue to make greater use of the website's event calendar, we are subscribing to the pro version. This allows us to set up recurring events, which makes maintaining the calendar more efficient.
- **New Indexer Resources pages** We implemented an FAQ plugin as a platform for the "frequently asked questions" of new and aspiring indexers.
- **Backup software** We are in the process of implementing a more robust backup system that will store our website backups on Dropbox instead of at the website hosting service.

### ***Hosting Service Upgrade***

One of the consequences of a growing website is the need for more resources from the hosting service. When we started incurring website errors, I worked with the hosting company to upgrade our service. We are now at the maximum service they offer, which is barely adequate, since we are still experiencing errors from time to time. I am currently researching the other web hosting companies with servers in Canada that we could potentially switch. Such a move would take place this summer.

### ***Conference.indexers.ca***

A new subdomain was created to host our conference pages. Now users can go directly to conference.indexers.ca to learn about the current conference. The new site also allows every conference registrant an account to log in and access conference resources, such as recordings and handouts.

### ***Separation of Website Administration and Website Development***

I am extremely grateful to Christine Dudgeon for taking on the role of Website Administration since February 2022. While Christine has been dealing with the day-to-day activities of maintaining user access and website content, I have turned my attention to website development, documentation, and solving performance issues.

### ***Christine Dudgeon***

In February 2022 I volunteered to take over the Website Administrator position. Since then, I have been learning many of the tasks and have made a few minor changes. Over the past year, several improvements to our website have been made:

- The Events Calendar has been improved for recurring events and viewing upcoming events.
- There is a new section for “Pages under Construction” so that committees developing pages have a place to create and test them. Only the committee members will have access to those pages until they are ready for view by everyone.
- The annual conferences now have their own separate web space. Last year’s information and recordings were transferred there and the 2022 Conference will be based there.
- Members are now able to post photos in the Member Directory.

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## ***International Liaison to ICRIS (International Committee of Representatives of Indexing Societies, Margaret de Boer)***

ICRIS is composed of nine indexing societies and networks: Australia and New Zealand (ANZSI), Canada (ISC/SCI), China (CSI), Germany (DIN), Ireland (AFEPI), the Netherlands (NIN), South Africa (ASAIB), the United Kingdom (SI), and United States (ASI). This diverse group of people from around the world, are very open to sharing knowledge on indexing matters from their corner of the world for the benefit of all indexers.

Informal online meetings were held twice this past year, on September 29, 2021 and April 6, 2022.

These online meetings are well received by indexing societies as a way to stay connected as our usual in-person meetings at conferences are on pause. There is enthusiasm to continue these online biannual gatherings, which have a welcoming and collaborative atmosphere. Each society will take a turn at organizing and hosting meetings.

At these meetings, each society is given the opportunity to give a brief summary on topics such as their membership numbers, their conference, and other ideas sharing about their member meetings and events.

During these two meetings some of the discussions were about:

- membership numbers: Some societies are experiencing a drop in membership, some of it attributed to retirement but others such as our society have seen an increase in membership.
- new indexers getting work: societies talked about resources geared to new indexers, bursaries, mentorship, and also to encourage new indexers to volunteer for their society as this increases their name visibility and possible job opportunities.
- about affiliations with other editor and publisher organizations. We are a member of the Book and Periodical Council (BPC).
- whether ICRIS should have its own website. An ad hoc committee is currently studying this and they will present a detailed report at the Berlin conference. For example, it would be a site where all societies would list information about their conferences and include links to their society website.
- ANZSI reported they have success with a book exchange for their members with all postage paid for by ANZSI. ISC/SCI is currently studying the feasibility of doing this too.
- conference hosting experiences were shared, including the pros and pitfalls of hybrid conferences which require more peoplepower and great expense due to the technical cost.
- National Indexing Day - March 31: Thirty people were online from SI (UK), including some from outside the indexing community. They thought it was effective and they were glad they did it. They even had a bit of media coverage. ANZSI (Australia and New Zealand) also held an event covering all time zones with eighteen members. They were very pleased and had some new indexers present. It was an energizing event for members. It was noted that the day need not be celebrated exactly on March 31.
- Berlin conference: A hybrid conference will be held on October 17–18, 2022. The conference keynote speaker from the Netherlands will be Prof. Kiene Brillenburg Wurth, who will talk about the future of indexing/non-alphabetic indexing and the keynote speaker from Germany will be Prof. Urs Stäheli, who will talk about the sociology of indexing/list making. The venue will be at the WeiberWirtschaft women's cooperative in the centre of Berlin. Following our conference model, there will be no breakout sessions. Dennis Duncan and Paula Clarke Bain will be speaking on the translation process of his book.
- ICRIS representatives will also attend their triennial meeting on October 16, the day before the Berlin conference begins. An important order of business at the meeting will be a review of the ICRIS agreement for any necessary amendments. The ICRIS agreement is available for you to read on our website.

The Society of Indexers (SI) online conference from the UK was held November 9/10:

It opened with the joint keynote presentation on the recent publication of *Index, a History of the* with the author Dennis Duncan and the indexer, Paula Clarke Bain. Dennis is a witty and engaging speaker who spoke about the research, writing, and publication process of his book. Paula described the indexing process as fun, yet challenging. She spoke about using the indexer's voice, and it being less neutral in this book. Both discussed author-indexer relations during the indexing process. One factor in his choice for indexer was that Paula had status by being on the SI executive.

A session on indexing the metatopic drew much discussion. There are as many opinions on how to approach the metatopic as there are indexers. Other sessions were held on indexing software and another on finances. All very useful information.

Finally to end this report, sharing of society newsletters continued through the year. We have a reciprocal relationship with ICRIS societies where we circulate our *Bulletin* newsletter and we circulate their newsletters to our members, posting them on our website.

# Reports from Committees

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## *Archive Committee (Chair: Christine Jacobs)*

### **Completed**

We had hoped to have an intern for a full 105 hours, but because of the pandemic, their availability was for 35 hours stretched over 7 weeks and their work was virtual. However, despite limited time, Jacinta Welch did accomplish several tasks that have moved the project forward. She researched legal requirements and created documents that will help with the next steps:

1. Draft retention schedule based on legal requirements
2. A PowerPoint explaining the definitions for vital, administrative and financial records and relating these to the retention schedule
3. An inventory form that can be used to survey record holders.

### **Next Steps**

1. Consultation among Committee members as to how best to use these tools
2. Surveying of record holders
3. Decision made in conjunction with the Board about file storage options.
4. Setting up of additional file structures if/as necessary
5. Commence gathering files that fall under the retention schedule

Archives Committee

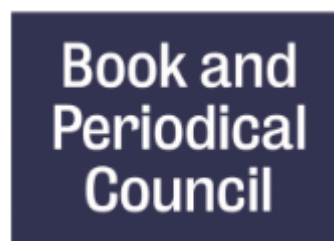
Christine Jacobs (Chair)  
Carlisle Froese  
Siusan Moffat  
Gillian Watts  
Intern: Jacinta Welch

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## *Book and Periodical Council (Representative: Ronnie Seagren)*

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

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





Ronnie attended their AGM meeting in October, and Alex was part of one of their member hubs. Here are some highlights from the year. If you are interested in any particulars, please check the BPC website or ask Ronnie.

### ***Publishing 101***

The Association of Canadian Publishers (ACP) offered their free online Publishing 101 course in October and November, which Margaret attended. When they offer it again, it will be posted on the ISC/SCI list. The seven weeks cover these subjects: Publishing and editorial; Contracts and royalties; Financial forecasting and management; Book marketing; Rights and licensing; Distribution, inventory, US sales, and workflow; Sales and marketing.

### ***Copyright News***

BPC members have posted several articles in response to the April federal budget and announcements about copyright. You can read them in the [Member News section](#) of the BPC website. Access Copyright was happy to see the budget commitment to amending the *Copyright Act* to ensure fair compensation for creators as part of a sustainable educational publishing marketplace.

### ***Member Hub Meetings***

In April interested members met to discuss hiring and recruitment, with a focus on remote work. In January the focus was on what's in the "toolbox" used by various members. These ranged from ways to get on top of your email inbox to subscription services useful in developing content. You can find the [list here](#). And in December three organizations discussed the experience of reopening their offices and meeting in person.

### ***AGM***

The BPC AGM was held on October 27, 2021. In addition to the usual financials and election, fourteen of the member associations provided a summary of what they're up to. You can find a list of [members here](#). You can check their websites for information about what they do and services they offer.

### ***Conferences***

- October 21–23 - [Surrey International Writers' Conference](#) (virtual)
- September 21–23 - **ACES**: The Society for Editing (American) [virtual conference](#) (program not yet announced)
- June 17, 2021 - **Book Summit** (virtual, 11–5 EDT). The theme is Sustainable Publishing in a Changing World, and it's cosponsored with the Toronto Festival of Authors. Sign up [for the newsletter](#) and get the schedule. The keynote will be by Zahra Al-Harazi, co-founder of Skillit, on the power of organizational purpose.
- May 28–29 - [Editors Association of Canada](#) virtual conference
- February 20–26 - **Freedom to Read Week**. This one already took place, and you can find some [notes about the event](#) here.

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## ***Conference 2022 (Chair: Lisa Fedorak)***

After the last conference there had been consultation with the membership and it was decided to alternate annually between an in-person and virtual conference as the online conference is more accessible to members in terms of cost and geography, while the in-person conference provides a different experience. While 2022

should have been an in-person conference as the committee began meeting in the fall it was decided to have another virtual conference due to ease of planning during the pandemic. The format was decided to be similar to the previous online conference but take place over two days as opposed to three which reducing the session from ten to seven. Paid technical support would be in place again this year. We also decided to return to putting a call out for proposed sessions, however the decision was made too late in the year for a successful call to put out without impacting the work of Maggie Billard Cosgrove who was responsible for programming.

Dennis Duncan author of his, (then) to be released book *Index, History of the* was secured as the keynote. Based on the Duncan's book the theme of *Past Perfect, Future Progressive* was determined to reflect changes in the profession. It was decided not to secure his indexer Paula Bain Clark as we didn't want to replicate the talk that Duncan and Bain gave at the recent SI conference. Sessions were selected to reflect the past (History of Parliamentary Indexing) through to the future (Teaching the Next Generation) as well as practice sessions aimed to help freelancers in their business ranging from editing to cybersecurity. The Fireside Chats (hosts Alexandra Peace and Mary Newberry) took place prior to the official start of the conference to allow new indexers to ask their questions immediately to hopefully help them get more from the following conference sessions. The Fireside Chats would have their own networking session after the chats which would take place during software vendor sessions, which included a first-time vendor Barry Campbell of IndexExploit.

As of April 28, we have seventy-six registrants from around the world including twelve Fireside Chat attendees.

JoAnne Burek (conference website)  
Lisa Fedorak (chair)  
Maggie Billard Cosgrove (Programming)  
Moirá Calder (publicity)  
Nancy Wills (registration and minutes)  
Maura Brown (documentation)  
Lee Stickles (hired technical support)

The committee would like to thank Alexandra Peace for her work formatting the program.

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## **Ewart-Daveluy Award Panel (Chair: Judy Dunlop)**

### **Presentation of 2021 Award**

At the 2021 conference we were delighted to present the award to Stephen Ullstrom for his impressive index to the *Shield of Psalmic Prayer* by Donald Sheehan, published by Ancient Faith Publishing.

### **Eligibility Criteria**

At our meeting in June 2021, the committee reviewed the guidelines that were established when the award was created and the guidelines currently used by sister societies. We wanted to expand eligibility for non-Canadian members. Participants in the discussion were Noeline Bridge, Judy Dunlop, Christine Jacobs, Audrey McClellan, Mary Newberry, François Trahan.

As unanimously recommended by the committee and approved by the board in the fall, we have new eligibility criteria. If the indexer is a Canadian citizen or a Canadian resident, the indexer is eligible. If the indexer is not a Canadian citizen or resident, the indexer is eligible if the indexer is an ISC/SCI member at the time of writing the index. Indexers may nominate themselves.

At a meeting in 2022 the committee decided that previous winners are eligible to apply.

### **Changes to Submission Procedures and Documents**

Because of technical problems over the last few years, we changed our process so that documents are now sent directly to the chair instead of being uploaded through the website.

Documents submitted with the application now include a PDF of the published book OR the PDF sent to the indexer to write the index and the Word file sent by the indexer to the press.

### **Submissions**

Deadline for submissions was March 15, 2022, for books published in 2020 and 2021. We are pleased with the number of submissions we received. The runners-up will be notified in early May and the winner will be announced at our virtual conference in mid-May 2022.

### **Committee Members**

This year we welcomed Stephen Ullstrom as a new member. Future chairs include Audrey McClellan for 2022–2023, François Trahan for 2023–2024, and Stephen Ullstrom for 2024–2025.

Judy Dunlop, Chair, 2021–2022

Audrey McClellan, François Trahan, and Stephen Ullstrom

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## **Mary Newberry Mentorship Program (Chair: Tere Mullin)**

### **Matches**

When I stepped into the role of coordinator in the spring/early summer of 2021, there were three applicants awaiting matches, and they were matched with mentors as follows:

- Céline Parent was paired with Mary Newberry
- Lora Marchand was mentored by Gillian Watts
- Matthew MacLellan was mentored by Christine Jacobs

There was subsequently a long period of inactivity with respect to applicants, until March, when Patti Phillips applied. I am currently finalizing the paperwork for her placement with mentor Noeline Bridge. I will then step down as coordinator and hand things off to Carlisle Froese.

### **Administration**

I spent my downtime updating the mentor database and correcting some issues in the program documentation (Starter Package). Besides filling in missing mentor information, I wanted to update availability, since some mentors had not been contacted in a while.

I also wrote a small blurb for the *ISC/SCI Bulletin* to promote the program, which appeared in the winter issue.

### **Things to Think About**

I had intended on expanding my list of mentors. Since I had so few applicants I didn't pursue this with much vigour, but this is something that could be revisited. Mentors' circumstances can change and we can lose people over time, so it would be nice to ensure we have enough mentors available at any given time.

Stephen Ullstrom mentioned when he stepped down as coordinator, that mentors might be interested in receiving guidance from other mentors. I reached out to mentors to gauge interest in collaborating with or learning from other mentors, and a handful responded positively. I noted who expressed interest in the mentor database. A next step might be to sketch out what this "mentors' mentorship" program might look like; mentors could be matched with each other just as mentees are, or perhaps the mentorship coordinator could facilitate a one-time meeting between mentors if that is all that's needed.

I am now handing the torch to Carlisle Froese. I'm sad to leave the position, because as a former mentee, I truly believe in this program and I genuinely enjoyed championing it. However, Carlisle is enthusiastic and already has great ideas for promoting the program. I know she'll be an excellent coordinator.

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## ***Member-Initiated Groups (JoAnne Burek, Vicki Gregory, Alexandra Peace)***

We had a request from a member to start a study group. A committee formed, and JoAnne Burek quickly gave all the information she had, as she had already been thinking about this. The committee came up with the guidelines and within a day or so, the first group had started.

Jolanta Komornicka is leading a book group. Matthew MacLellan quickly followed behind with a study group for Cindex.

A member-initiated group (MIG) is managed and led by an ISC/SCI member, not necessarily a committee or executive committee member, for the purpose of learning and networking with other members. Examples: a group studying a software manual or a discussion group on an indexing book.

MIGs provide opportunities for members to learn, communicate and collaborate with each other. It's one more benefit of membership.

MIGs have two possible structures:

An open group that members can drop in and out of at any time

A group that members can join by a certain date, and after that date, the group is full (e.g., for a book discussion)

The group may only be initiated by an ISC/SCI member, but the group may have non-ISC/SCI members.

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## ***New Indexer Resources Committee (JoAnne Burek)***

The committee was established in July 2021 to address an obvious and increasing need among our growing membership. The national monthly chats were very well-attended by new indexers, but we were spending the majority of the hour answering the same basic questions. It was clear that the resources they needed to answer their questions were either inadequate or out of date, not easily found, or didn't exist.

A committee was struck to track down and assemble good resources, and to find a way to make them easily available. We decided that the committee also needed to find the following:

- a way to build resources over time and to keep them up to date
- a format to help the readers find answers to their questions in a precise and focused way

The format we chose was an FAQ-style web page that can be added to over time and updated as often as needed.

### ***New Indexer Resources Specifications***

The specifications for the FAQs are the following:

1. Reader-friendly content structure

The content is presented in a question-and-answer format. The question, or headline, is stated in the first person, and it's tightly-focused and even elaborated on to make it relatable to inquiring readers and attractive to search algorithms. For example, "How do I make a good impression with a client so that I can secure repeat jobs?" The answer is presented as a short piece of content of 300–500 words.

At the end of the answer, we try to include links to more resources.

We found when writing the first few pieces that it was easy to go down a rabbit hole of answering a lot of questions in the same article, because one thought naturally leads to the next and we want to treat a subject thoroughly. Now, rather than writing a long essay covering everything on a topic, we try as much as possible to break up the content and separately answer more specific questions.

## 2. Restricted access but with teasers for the public

Most of the time, content is intended for members only, as it is high-value and should not automatically be given away. Therefore, we make the question (headline) and the first few lines (teaser) open to the public, but with the rest of the response requiring log in ("To see more, login or become a member").

However, content for people who want to know more about indexing as a career will be entirely accessible to the public.

## 3. Feedback to responses

Each content piece allows the reader to comment and even ask a follow-up question.

## 4. Process for updates and additions

From the webpage, users can contribute questions and answers.

### **Committee Status**

The New Indexer Resources page was launched in March 2022 with thirteen questions answered, five of which are for people aspiring to be indexers. There is plenty of room to grow.

With the foundation in place, the Committee has evolved to just JoAnne Burek to maintain and add content, and Patti Phillips for copyediting and proofreading. Suggestions for new content are very welcome, and can be sent to [nirc@indexers.ca](mailto:nirc@indexers.ca), or readers can use the form on the webpage.

I would like to thank Julia White for chairing the committee in its initial stages, Tere Mullin and Lora Marchand for contributing content, and Pat Richards for her support and ideas.

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## **Outreach Committee (Chair: Siusan Moffatt)**

The Outreach Committee consists of TIDE (The Inclusion, Diversity and Equity committee), Publishers Outreach, Users and Usability, and Technology and Skills.

For three years TIDE has offered the bursary program to achieve equality of opportunity for aspiring indexers belonging to underrepresented or marginalized groups. The intention is to spread goodwill and knowledge of indexing in diverse communities.

We've had three bursary winners and offered more than ten 6-month trial memberships to date. Two winners finished the Simon Fraser course and the Berkeley course has taken in three of our members in the past year.

Our first bursary winner, Sandra Muchekeza, finished her indexing course in February 2021, and has done six indexes to date, as well as working at her full-time job. Our second winner, Nicole Riguidel, finished her Simon Fraser course and is now taking the rigorous Berkeley course while working full-time.

Our third winner, datejje cheko green found our bursary announcement through the Canadian Association of Black Journalists. She is a part-time audio journalist and part-time scholar who is also involved in archiving and athletics. She is currently working on an indexing project for Black news gathering and taking the Berkeley course.

Approximately thirty indexes have been completed by people who've won bursaries or trial memberships. TIDE has had five Zoom meetings with all members this past year and many individual check-ins. We've had lots of positive responses about our program as well as helpful critiques.

Matthew MacLellan, who won a six-month trial membership in May 2021, not only stayed an ISC/SCI member, but he also joined TIDE, became the BC regional representative, and is the new ISC/SCI webinar coordinator! Stay tuned for more ISC/SCI webinars in the future now that we have a dedicated person. If you have any topics you'd like to see, please get in touch.

Matthew says, "I sincerely believe being a runner-up to the bursary helped propel me into full-time indexing work. It helped me to make valuable connections I might not have made as quickly without the six-month membership, and encouraged me to persevere through the early stages of writing practice indexes, networking with other indexers, and maintaining hope and optimism."

Trial member Leah Horlick took some time out for a full-time job, and is back in indexing action as of this spring: "The six-month membership trial was profoundly validating and made it possible for me to afford my course tuition more easily, thanks to the membership discounts I was able to qualify for on textbooks, software, and conference fees. Following my training, the ISC/SCI listing made it possible for me to begin working as soon as possible. I'm very grateful to ISC/SCI and the TIDE committee for all the opportunities and mentorship thus far!"

We'll start promoting the 2022 bursary on the week of June 27<sup>th</sup> to our list of contacts. The deadline is August 31<sup>st</sup>. If you know of anyone who might be interested or any organization that should hear about it, please share the link: <https://indexers.ca/tide-application/>. The winner has until March 15<sup>th</sup> to start their course.

Thank you for being such a warm and welcoming society! Many winners have commented on this!

**Publishing** – Judith sent out a mailing to publishers in March. Before next year, we need to verify for all publishers the addresses and editor names (if possible). She would like to find a comprehensive list of all Canadian publishers to check her database against.

Also, we must find some way to evaluate the effectiveness of this program.

**Users and Usability** – Now that things are opening up across the country, having some volunteers to research possible tabling events would be really helpful. For example, Word on the Street will be held in Toronto in June and Lethbridge in September. If you can give some time, please get in touch with Siusan Moffat.

As other approaches to education, outreach, or communication, we need to investigate other options to remind the wider community about indexing. These could be targeted to authors, publishers, universities, and the general public. They should include not only how, but also why indexes are important.

Jason Begy started a literature review and some brainstorming about the usability of indexes.

In addition, Ronnie Seagren is a part of the W3C EPUB 3 Working Group Virtual Locators Taskforce, considering options for locators in EPUB-formatted ebooks, where the lack of consistent page numbering has a huge impact on indexing, accessibility, and education. The primary goal is to find an interoperable solution, especially for content whose publishers have not provided page lists.



**Technology and Skills** group – This group focuses on new technologies and how it impacts indexing. Society of Technical Communications (STC) would be a great sister society to ISC. We have many of the same skills and both organizations know the importance of indexes! If you are a member of STC and want to do this outreach, please get in touch with Siusan Moffat.

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## **Survey Committee (Chair: Lisa Fedorak)**

### **Rates Survey of 2021**

On April 2, 2022 we presented the Summary of Useful Findings to the membership and had an hour-long discussion afterwards. We had about twenty-three people in attendance.

There was a lot of appreciation for the survey and the anticipated regularity of the survey that also included suggestions for the next time the survey happens.

Key takeaways from discussion that are recommended to be considered in the next survey:

- part-time vs full-time. There were questions about part-time work and were indexers part-time voluntarily or involuntarily, meaning did they need to have a second income, even if that income is editing. This would be an additional question to the F/T or P/T question.
- add \$/word as an option for a rate
- add embedded indexing as a service and delineate between InDesign and Word
- ask about rates for embedding indexing (InDesign and Word)
- include a brief description of a packager in the text for those who don't know what it is
- don't use add up to 100% as an option for questions as the results are too difficult to assess
- ensure the texts that were quoted on are made available on the website for members to assess themselves
- make the public portion on the website more visible to help educate potential clients as to what the cost of indexing could be

### **Survey Guidelines, Draft**

We are working on creating a policies and procedures document for this committee. So far, we have the following recommendations, which still have to be taken to the executive committee for acceptance.

A minimum amount of surveying should be done – ideally a maximum of once a year. To keep the surveys to once a year, all surveys go through the survey committee. Note that evaluations of events such as conference and webinars are not considered to be surveys. The conference committee and the webinar committee may send out evaluations of their events.

Once the survey committee has received all the results, they will write a report summarizing them and communicate this report through the usual channels.

One of the following surveys should be sent in the fall of each year: The Long Survey, Rates Survey, Short Survey, and the Very Short Survey.

The Brief and the Very Short surveys will help alert the executive committee to shifts in satisfaction and give members an opportunity to voice concerns or kudos. An annual survey also invites people to participate in how the Society is run.

The number of additional requests from committees should be reasonable and the questions reflective of the type of survey going out.

The Very Short Survey asks the following questions:

- On a scale of 1–10, how happy are you with your membership in ISC/SCI?
- Tell us anything you think we should know.

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

One survey should go out each year in a four-year rotation as follows:

2022 – Brief Survey  
2023 – Long Survey  
2024 – Very Short Survey  
2025 – Rates Survey

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## **Webinars Committee (Matthew MacLellan)**

The webinar program of ISC/SCI is still very much in its beginning stages.

Since taking over the position of webinar coordinator, I've had the privilege of speaking with Alexandra Peace and Wendy Savage about the work they and a few others did on preparing a document/prospectus that outlines the general guidelines/vision for the webinar program.

I've received some interest from members (and volunteers) about topics that would be of interest to the Society, pointing out that we have members who are likely in a good position to share some of their knowledge with the rest of the membership.

In the Spring of 2022, a presentation was held to go into the results of the Rates Survey. This offered a good introduction to some aspects of the webinar format.

Next steps include figuring out more of the logistical aspects of webinars (sign ups, web hosting, etc.) as well as finalizing the first presenter and topic for a webinar.