

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

**Saturday, January 15, 2022, 1 p.m. EDT**

- 1. Welcome (Alexandra Peace and Jason Begy) and Roll Call (recording secretary Carlisle Froese) Tere Mullin, JoAnne Burek, Christine Dudgeon (guest), Margaret de Boer, Liese Achtzehner, Ronnie Seagram, Julia White, Lisa Fedorak, Judith Clarke**
- 2. Called to order at 1:07 EST – Welcome from Alex. Welcome to guest Christine and thanks to volunteers.**
- 3. Approval of Agenda motion to approve from JoAnne. Seconded by Jason. All in favour. Carried.**
- 4. Approval of Minutes: November 20, 2021 Executive Meeting motion to approve minutes asked for.**

Lisa asked for some amendments before they were approved. These included: adding Marco's last name; including "Lisa asked that our financial reports include a balance sheet with all components of the equation: assets = liabilities + equity;" adding "Tere, Judith, Liese, and Margaret will review the survey to see what is notable and what information they would like to see extracted from the survey. A committee - Lisa (lead), Julia and Wendy Savage was formed to compile the results into interpretive paragraphs supported by data, rather than just the findings alone" to section C; and making changes to section J as follows: change education to "education plan for publishers" and "In the recent BC Regional Meeting, the Executive Director of the Association of BC Book Publishers and former editor, who was a guest" Motion to accept minutes from the previous meeting with these amendments was put forward. All in favour. Carried.

- 5. Consent Agenda – Motion to accept consent agenda presented by Liese. Seconded by JoAnne. All in favour. Carried.**

Request made that reports include the name of the person writing the reports and the liaison for the committees, as per the format. This will allow members to know who they need to go to with any issues or questions.

## Regional Updates

- a) Central Canada | Centre du Canada (Ronnie Seagren, no report)
- b) Prairies and Northern Canada | Prairies et Nord du Canada (Liese Achtzehner)
- c) British Columbia | Colombie-Britannique (Lisa Fedorak)
- d) Eastern Canada | Est du Canada (Tere Mullin)

## Committee Reports

- e) Awards (Judy Dunlop)
- f) Book and Periodical Council (Ronnie Seagren)
- g) Bulletin (Vicki Gregory, no report)
- h) Communications (Judith Clark)
- i) Finances (JoAnne Burek)
- j) Outreach (Ronnie Seagren for Siusan Moffat)
- k) International Liaison (Margaret de Boer)
- l) Membership (Julia White)
- m) Mentorship (Tere Mullin)
- n) New Indexer Resources Committee (Tere Mullin)
- o) Webinars (Tere Mullin for Matthew MacLellan)

## 6. Items for Discussion

- a) President's Report (Alexandra Peace and Jason Begy)

One of the things that was discussed previously was a series of issues with getting translations done. Alex went forward to have a meeting with François to discuss this.

- There was a discussion of adding an English coordinator but that might add too much bureaucracy.
- There was a suggestion that there be a schedule created for Anna so that everyone knows what is going on. Most of the translations should be coming from the committees. TIDE, Ewart Daveluy Award, and *The Bulletin* need translations the most.
- The recommendation from this meeting was to develop a generic form for translations and there is a small meeting between heads of committees

and Anna so that everyone can meet each other and have an idea of what needs to be done and what everyone's schedule is.

- The ISC/SCI could also hire someone to do translations but it was agreed that these recommendations should be tried first. This would be the simplest approach. Alex said that she would contact committee chairs and Anna to set up a small meeting and come up with a schedule.
  
- b) Conference 2022 (Lisa Fedorak) – The conference committee asked to change the dates of the conference because of presenter schedule conflict and the fact that people may not want the conference to be on the weekend. The understanding from the committee was that the dates have not been announced to the public. However, they were in *The Bulletin*. Surveys from conferences past were the basis for the Friday/Saturday structure but it was added that this was for when people were traveling so they aren't comparable. It was added that, given that most members work from home, it is more difficult to attend a virtual conference with kids and everyone else home. Presenters do not want to work on the weekends. Discussion included the following:
  - It might be drastic to change the dates if there is no confirmation of presentation. Committee waiting on response.
  - The alternative dates may be easier for parents. It also works to keep business and personal life separate.
  - The theme was to be past/current on the first day and future on the second. This could be adjusted if needed though.
  - The fireside chat people would then be working on the Wednesday. This could be an issue for the people who have volunteered to do that.
  - The issue was started by presenter issue but turned into a discussion as to why the conference was structured as it was. That is why this has been brought forward.
  - This discussion could be applied to the conference going forward but it does not seem like a good idea to change the dates if they have already been announced. This could present the society in a bad light. Going forward, as things are virtual, it could be good to keep in mind that the

society is not tied to two days. It could be four half days, for example. The committee did discuss doing four half days.

To summarize: the committee's recommendation is partially to change the dates. The general feeling from the exec is that dates could be changed as far as future conferences go but the dates for this conference should remain as they are. It was recommended that the committee just put presenters in as they can, not dictated by theme. It was also recommended that some questions be added to the surveys after as to what members' thoughts are as to weekdays/weekends. Exec is saying the dates are not being changed, conference 2022 will be the Friday/Saturday.

c) Congress for Humanities Ad (JoAnne Burek):

The agreement last time was that the ISC/SCI would do the same as last time but the terms have changed. JoAnne's recommendation was to fund the ad for three months and then evaluate based on the data as to what the society does next.

JoAnne also gave some information about a virtual room that ISC/SCI could purchase. The virtual room would be a great idea for next year if the society has the capacity.

Motion: JoAnne is recommending that we run the three-month ad for \$850 and then move forward based on the data received. Lisa seconded. All in favour. Carried.

Discussion:

The virtual room is available for the whole conference. The society could do whatever they wanted with it (decided when and how to staff it). Exec asked for their thoughts on this.

Schedule could be set as we needed or had volunteers for. There was a suggestion that the society could run sessions and then take questions after. This would be for next year. This could be part of the society's educational outreach. This could be something done by the outreach committee, maybe developed over the next year. Cost is \$1,200. Exec thought that this would be great for next year. What needs to be done for this to work for next year.

Alex and JoAnne will write up a blurb to ask for a head of committee to make this happen for next year.

d) Archives (Alexandra Peace for Christine Jacobs)

Christine Jacobs has hired an intern to give us a plan for the digital archives, under Christine's supervision. Christine needs a list of all the folders. Alex asking for exec approval for Christine to go through everything so that she has a list of the kinds of documents that the society has in the various files/archives.

Alex moved that Christine be given view only access to all our folders. Tere seconded. All in favour. Carried.

e) Web Administration (JoAnne Burek)

Pages under construction for the new indexer outreach. JoAnne asking for exec approval for this approach. Nothing is publicly available as it has not been announced but this allows for the committee to review/work on/proofread. On the membership board there is a section that shows the pages under construction. Only the people on the committee for pages under construction will have access. Anyone else will have to ask for access. This could work for any committee that needed a page built for them. Exec thought that this was great.

f) *The Indexer* (Alexandra Peace)

First, the email sent by Claire needed to be addressed. Jason and Alex are doing this. This came from a whole misunderstanding, but LUP will be reminded that the membership should not be directly contacted; they should contact the presidents only.

Second, someone asked if they could not receive a hard copy of *The Indexer*. Julia asked for a confirmation of process as to what to do. It is not uncommon that members ask to have no hard copy. Julia sends LUP a note saying don't send them a paper copy. UK members already receive their indexer from another membership, so the society has not been paying for subscriptions for them as it is not necessary.

Discussion offered the following: There is a fear of a potential issue: membership is being paid for, but the members are not receiving the full benefit. Could people ask for a discount if they don't want a copy of *The Indexer*? No one has ever asked for this.

Exec decided that benefits would not be picked apart so this would be left as is.

g) Rates Survey (Lisa Fedorak)

Lisa thanked for the work that went into this. There were requests and discussion:

- Request: A brief summary of the survey information that the survey brought in to be published in the bulletin. Exec approved.
- Request: A summary of useful findings to be put up on the website in the members only section. Exec approved.
- Request: Survey to be undertaken following schedule every four-five years. Currently Lisa and Alex are working on a survey schedule which it will follow. Exec approved.
- Survey results be presented to the membership in an online meeting with discussion available. This will need publicity and host but is not a webinar – should it go through Matthew? Tere said that this could work and that she would ask. Exec approved. Left with Lisa and Tere to discuss with Matthew. Only current members in good standing would be allowed to attend.
- Is there going to be a place for discussion in the next survey? One of the issues is that there are not enough responses to come up with information so that is why a presentation and discussion are being recommended this time. Some things can be drawn out but not everything. Issues such as hours to complete a project or part-time vs. full-time are open for interpretation. Discussion would allow people to bring their questions or observations in order to clarify.
- There could be a survey with the American society to provide better numbers.
- ASI has public summary of their survey. It could be good to offer this as a comparison. SI has one too.
- Discussion should be limited as there has already been a great deal of work that has gone into this already. The hope is that people get together to be more open about their rates and process so that we can all support each other. It would be good to use the survey as a reference/starting point for discussion. It could be asked as “if you want to get together to discuss” so that people understand that it will not be a presentation.
- Moderation would be helpful to keep the discussion on track, possibly Lisa and Julia.

h) TIDE (added)

Best practice with the diversity bursary would have the society provide details as to the reimbursement schedule or directly take care of funding. This made the TIDE committee think that this may have factored into previous decisions. Outreach had not considered this perspective. In the future, for a winner the committee will just offer to cover the cost up front of the course then reimburse for materials.

Alex said that this had been previously discussed and the issue is what if they don't take it after it has been paid for. This should be discussed. It was added that there could be a financial literacy issue as some courses are US dollars. Winners may think that they have to finish the course before they are reimbursed. This is not the case.

Exec asked Ronnie to take back to committee that the exec does understand the issue but this does have to be put on a credit card and what is to be done if the society pays and the course is not taken? There needs to be more discussion. TIDE is meeting in a week. Ronnie confirmed that they would discuss. February 2022 will also see a TIDE meeting with winners/runners up to discuss.

## **7. Action Items**

### **8. New Business**

a) Email List Guidelines – Exec decided that this was necessary. Find recommendations from report. Discussion of what was provided by Judith and Julia offered the following:

- No moderator but there would be a generic response generated so that any member of the exec could pop into the discussion if someone is not following the guidelines as to streamline the process.
- FAQs will be presented to the exec once they are finalised.
- Exec approved. Commented as to the friendly and approachable tone, reflects the society's intentions as a whole.
- There was a suggestion of a virtual tour of website for members. General assent given from exec. (to be discussed next time)
- Exec agreed to put these on the website.

## **9. Next Meeting**

Saturday, March 12, 2022 (budget meeting)

April 23<sup>rd</sup>, 2022 (quarterly meeting)

June 11<sup>th</sup>, 2022 (AGM)

## **10. Adjournment 3:29pm EST**



## 11. Reports

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### *ISC/SCI Prairie Region Report (Liese Achtzehner)*

There was no Prairie chat for December, as my life had some expected and unexpected walk-ons that threatened my sanity. All's well now.

We have two new members for the Prairie Region! Helmut Filacchione in Murfreesboro, Tennessee and Alex Benmerrouche in Saskatoon, Saskatchewan.

I do not have anything for discussion.

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### *BC Regional Report (Lisa Fedorak)*

Dec 1, 2021 Meeting

6 attendees

In addition to updates about the recent executive meeting and check ins to see how everyone is doing, we reviewed an index by a fellow indexer, assessing it according to Margery Towery's 10 Characteristics of Quality Indexes. The index was for a scholarly text and a lot of discussion took place about a number of the elements of the index most notably about force sorting and how contributing authors were dealt with in the compilation. The discussion was an hour and a half or two.

New members:

Fenrir Cerebellion, Chilliwack, BC; Basic Trial  
Mieke de Vries, Shawnigan Lake, BC; Basic Trial  
Sheila Ryan, Beaver Creek, OR, USA; Individual Basic

Next meeting Feb 2, 2022 at 7pm pacific time.

## *ISC – Eastern Region Report, January 6, 2022*

Since our last Executive meeting, a new member has joined us! Natanya Belle de Smit is from Pointe Claire, Quebec. Hopefully we'll have the opportunity to meet her at our chat in February.

We held our Eastern region chat December 15<sup>th</sup>, where we shared our favourite indexing tricks, tips, and resources.

Our next regional chat is scheduled for February 16<sup>th</sup>, and we will be hosting a guest speaker, Do Mi Stauber. Do Mi has graciously agreed to share her time with us. I will approach Eastern members within the next week or so to determine what chapter of Do Mi's book they would like to discuss, and then members can prepare a question or two ahead of time.

I do not have anything to bring to the executive committee for discussion.

Submitted by Tere Mullin

January 6, 2022

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## *Ewart-Daveluy Indexing Award Committee (Judy Dunlop), January 15, 2022*

### ***Eligibility criteria change***

As 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 an ISC/SCI member at the time of writing the index.

Because of this change, our Call for Submissions now includes additional communications with ASI. The Call for Submissions went out in the fall, and we will arrange for at least two reminders of the deadline, which is March 15, 2022.

### ***Changes to submission procedures***

Because of technical problems over the last few years, we changed our process so that documents are now sent directly to the chair instead being uploaded through the website. We are now receiving submissions using this direct method of communications, and it is working well. One noticeable change is the increase in questions from the submitters. Person-to-person communication seems to help the submitters as well as the committee.

### ***Members***

We are delighted that Stephen Ullstrom has joined our committee. Stephen won the award last spring for his outstanding index to *The Shield of Psalmic Prayer*.

Stephen has agreed to be a member during the next three years, and he plans to be chair during the 2024–2025 award year. Other future chairs include Audrey McClellan for 2022–2023, and François Trahan for 2023–2024.

Judy Dunlop  
Chair, 2021–2022

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### ***ISC/SCI Communications Report (Judith Clark)***

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

- 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]
- 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]

#### ***Committee service***

- Currently part of the committee putting together guidelines for the ISC-I forum email list.

- Revised a draft of guidelines for review.

Informational report. No action items.

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### *Treasurer's Report (JoAnne Burek)*

#### **Financials**

Our financials remain healthy. Since the beginning of the year, we have had a net increase of \$1381.46.

<b>Statement of Changes in Financial Position</b>			
	31-Mar-21	Change	31-Dec-21
Cash Account	\$ 31,655.39	\$ 830.90	\$ 32,486.29
GICs	\$ 13,703.33	\$ 95.40	\$ 13,798.73
Stripe	\$ -	\$ 455.16	\$ 455.16
Total	\$ 45,358.72	\$ 1,381.46	\$ 46,740.18

Since the last report of October 31, income was \$2,284 and expenses were \$2469.

The Profit and Loss/Balance Sheet is below:



Adobe Acrobat  
Document

This report is presented for information.

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### *International Liaison (Margaret de Boer)*

There is little news to pass along during this Christmas and New Year period.

Society newsletters were received and uploaded onto our website and communicated to our members.

Look ahead to the spring when there will be another ICRIS Zoom meeting.

Stay tuned!

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### *January 2022 Membership Report (Julia White)*

#### **Activities Completed**

- Ongoing updates of membership renewals, activations, and lapses
- Sent out mass emails to membership
- Worked on ISC-I listserv documentation to be posted on indexers.ca members'-only area:
- Developed draft user guidelines with President (Alex Peace) and Communications (Judith Clark)
- Began draft FAQ document explaining basic procedures such as how to subscribe, how to unsubscribe, etc.
- Worked with Lisa Fedorak and Wendy Savage on upcoming Rates Survey Report

#### **Total membership numbers**

As of January 8, 2022, we have 128 active members.

On a year-over-year basis, overall membership numbers have increased 9.4%. Canadian memberships have risen by five and international memberships have gone up, as well.

Since the last full report in November 2021, the total number of members has increased by one. The number of Individual Listed memberships has declined by four; however, this decrease was offset by the increase in Basic Trial memberships. The other membership categories were mostly stable.

Paid memberships: Excluding honorary memberships, paid membership numbers are up 4.5% over the last twelve months. Since the last report in November 2021, paid memberships are down by four.

Comparative	Jan 2022	Nov 2021	Jan 2021
<b>Total</b>	<b>128</b>	<b>127</b>	<b>117</b>
Canada	105	107	100
International	23	20	17
Individual Basic	31	30	32
Individual Listed	72	76	67
Individual Listed (bursary)	3	3	1
Student	3	3	4
Emeritus	4	4	3
Institutional	10	11	8
Basic Trial	5	0	2
Paid Memberships	116	120	111
Honorary Memberships	12	7	6

Residency of memberships							
Canada	Total	Basic	Listed	Student	Institut'l	Emeritus	Basic Trial
BC	19	4	12	-	1	-	2
AB	11	1	8	-	1	1	-
SK	5	-	2	-	1	-	2
MB	-	-	-	-	-	-	-
ON	52	12	31	1	4	3	1
QC	11	3	7	1	-	-	-
NB	2	2	-	-	-	-	-
NS	4	1	3	-	-	-	-
PEI	1	1	-	-	-	-	-
NL	-	-	-	-	-	-	-
<b>Total Canada</b>	<b>105</b>	<b>24</b>	<b>63</b>	<b>2</b>	<b>7</b>	<b>4</b>	<b>5</b>

International	Total	Basic	Listed	Student	Institut'l	Emeritus	Basic Trial
United States	20	5	11	1	3	-	-
Other	3	2	1	-	-	-	-
<b>Total international</b>	<b>23</b>	<b>7</b>	<b>12</b>	<b>1</b>	<b>3</b>	<b>-</b>	<b>-</b>

### ***New members***

The following members have joined (or rejoined) since the last full report in November 2021:

Natanya Belle de Smit, Pointe Claire, QC; Student Basic  
Alex Benmerrouche, Saskatoon, SK; Basic Trial  
Fenrir Cerebellion, Chilliwack, BC; Basic Trial  
Mieke de Vries, Shawnigan Lake, BC; Basic Trial  
Helmut Filacchione, Murfreesboro, TN, USA; Individual Listed  
Mamta Jha, Noida, Uttar Pradesh, India; Individual Listed  
Ashley Lavadinho, Stoney Creek, ON; Basic Trial  
Emma Mungall, Toronto, ON; Individual Basic  
Sheila Ryan, Beavercreek, OR, USA; Individual Basic

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

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

It's been a quiet couple of months with respect to the Mentorship Program, and I haven't received any new applications since our last Executive meeting.

I submitted a short write-up to the Bulletin, promoting the Program, and I hope that generates some interest.

I had planned on expanding our cache of mentors; however, since I haven't had any more applications come in, I've put this on the back burner for the time being.

**I do not have anything to bring to the executive committee for discussion.**

Submitted by Tere Mullin

January 6, 2022

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## ISC – New Indexer Resources Committee (NIRC) Report, January 6, 2022

NIRC members (JoAnne Burek, Pat Richards and Tere Mullin) have been working on the following items:

- The New Indexer Resources FAQ page and preliminary FAQs have been moved from the staging site to the production site as a “page under construction”, which means that the page is live but visible only to members who have Editor access on our site.
- New FAQs are being assembled from Martha Osgood’s “Novice Notes” series. We thought these articles are ideal for people who are wondering about becoming indexers, and so are making them available to the general public under the category “For the aspiring indexer”. We obtained Martha’s permission to update and republish these articles (giving her credit of course).
- We are continuing to produce content, and a new, three-part FAQ is almost complete.
- A table of contents is being compiled for the *Newcomers Indexer Collections* resource, which should help users locate articles more efficiently.
- A new email [NIRC@indexers.ca](mailto:NIRC@indexers.ca) was created with forwarding to the committee members.
- The main FAQ page allows visitors to contribute:
  - Anyone with a question can email NIRC
  - Anyone will be able to contribute a question and answer or suggest a resource using the form on the page. The form submission will go to the NIRC for moderation before publication.

Screenshot of NIRC web page:





We do not have anything to bring to the executive committee for discussion.

Submitted by Tere Mullin

January 6, 2022

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### *ISC – Webinars Report, January 15<sup>th</sup>, 2022*

I've been put in touch with Sunny Widerman, about organizing logistics for a first webinar on taxes. That happened over the Holiday break; I've had their email set aside to email them this month which is on my schedule for this week or next.

Joanna Burek was kind enough to email me schematic for a potential webinar graphic for this tax presentation.

I do not have anything to bring to the executive committee for discussion.

Submitted by Matthew MacLellan

January 7<sup>th</sup>, 2022

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### *Co-President's Report*

#### ***Jason Begy***

My ISC/SCI work has been a bit slow since the last meeting, as the end of the fall semester is by far my busiest time of year, work-wise. I wrote a brief letter to LUP asking them not to contact our membership generally, but to reach out to Alex and I instead if they need to communicate with the membership. I wrote my first-ever President's Message for the fall issue of The Bulletin, and Alex and I have continued our Dropbox

clean-up. I have also done a little more background work on my usability research project, but have nothing significant to report as of yet.

### **Alexandra Peace**

Although I don't have much completed at this time, I have been working with Ronnie (on TIDE materials), Judith and Julia (on email list guidelines and FAQs), Lisa (on survey policies and procedures), and Christine (on archives).

I also met with François to discuss the translation process. **I need some discussion on this topic.**

I am one of the proofreaders of the *Bulletin*, and I've discovered that there may be a process that would make things easier for Sergey. I have to play around with it a bit.

Jason and I continue to work well with each other and support each other. I am so glad to be co-president with him!

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### *Conference 2022 Report (Lisa Fedorak)*

January 15, 2022

#### **Committee members**

Maggie Billard, programming  
Maura Brown, documentation  
JoAnne Burek, website  
Moira Calder, publicity  
Lisa Fedorak, chair  
Nancy Willis, registration

The committee has met twice since the last report. Programming continues to be firmed up and is expected to be finalized for announcement in early February along with the opening of the early bird.

New this year, when receiving their email confirmation of registration, registrants will be asked for a ranking of their top choices, including write in options, for themed discussion rooms. Some general room themes will be duplicated from last year (scholarly and trade for example) and some new specialties will be added.

One issue has arisen, in that due to the schedules of two presenters, the committee would like to move the conference ahead by a day:

Fireside: May 11

Day One: past perfect Thru May 12<sup>th</sup>

Day Two: future progressive Friday May 13<sup>th</sup>.

### **Requests**

The committee would like to move the dates to be Thursday and Friday, 12-13, with Fireside on the 11<sup>th</sup>.

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### *Federation of the Humanities Ad (JoAnne Burek)*

At the November 2021 meeting, a motion was approved to proceed with running our ad in the runup to the Congress of the Humanities, under similar terms as last year.

The organization hosting the event is the Federation of Humanities and Social Sciences (FHSS). The website is [federationhss.ca](https://federationhss.ca)

Last year, our ad ran from December 2020 to May 2021. The terms were 3-6 months for \$1100 (no sales tax charged).

Because they changed hosting service in the middle of the term, we did not get Google analytics results for our ad. Because of that, the organization committed to giving us a 15% discount for advertising in the next event.

This year the conference runs from May 12 to 20. From the [brochure](#), the terms for running the ad on the website are

- 3 months for \$850 (\$722 after discount)
- 6 months for \$1500 (\$1,275 after discount)

These terms do not quite hit the mark for “similar terms as last year”.

Our budget for the ad is \$1100.

FHSS is also offering a new virtual booth opportunity that runs during the conference. The feeling among the executive at the moment is that we are not prepared to put that on.

Recommendation:

- Run the ad for 3 months and assess the analytics results afterwards.
- If we get enough responses to the ad (although I have no idea what “enough” means), think seriously about we might put on and run a virtual booth in 2023. I think if we are serious about reaching out to scholars in the social sciences and humanities community, I feel this should be a no-brainer.)

Any other ideas? Thoughts?

This report is for discussion.

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### *2022 01 15 Archives Report*

I have managed to secure an intern for this winter semester for about 35 hours of work. I am planning to have her analyse what I have here (already sorted with box lists from the last intern) and then to start requesting and looking at electronic files.

I will need to have access to all the folders owned by indexers.ca on Dropbox ... I intend to list types of documents from the folders so that the intern can get an idea of what is being produced and what needs to be retained. She will then develop a proposed retention schedule and a file-naming protocol.

Christine Jacobs

Motion: that JoAnne Burek give Christine Jacobs access to the folders on Dropbox so that the intern supervised by Christine can suggest a retention schedule and a file-naming convention.

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### *Website Administration (JoAnne Burek)*

#### ***New “Pages under construction” page***

I got this idea while working on the New Indexer Resources FAQ page. The page is not ready to go live, but I wanted our committee members to be able to review and apply edits and finishing touches. I wanted them to find the page from a central place on the website, so that they don’t have to hunt for the URL in their emails. Because the page is not ready to go live, we want to limit access to the just the committee members and anyone else who will be reviewing it.

The implementation is as follows:

- The Membership Dashboard contains a link to “Pages under construction”.
- The page itself is a table of committee/page names, contact names (page owners), and page URLs.
- See screenshots on the next page

This is an idea for any committee, collaborative group, or individual that wants to have a page on the website with access limited to itself while the page is under development. The intent is that the page must eventually go live.

The general membership will be able to see that a page is under construction, but they won't be able to see the page unless access is granted to them.

This is not for perpetually private pages—use Dropbox instead.

### ***Other website updates***

- Added the 2022 membership logo.
- Added a cosmetic update for readability. Paragraphs and list items are now limited to 60 characters wide. Formerly, a paragraph would display as wide as the page allows, which is difficult to read. Paragraphs now display as narrower columns.
- Added cosmetic updates to the Membership Dashboard.
- Edited the colours on the submenus on the navigation bar.

This report is for discussion:

I would like to know if the executive committee agrees with this approach—or perhaps understands the concept if it is not explained well—and if the committee has any suggestions regarding Pages under Construction.

## Membership Dashboard screenshot

<p><b>ISC/SCI Photo Albums</b></p> <p>ISC/SCI Conference and other photos are posted in our <a href="#">Flickr album</a></p>	<p><b>Website</b></p> <p><a href="#">FAQs</a> for creating your listing, how to become a website contributor, and how to create events and posts</p> <p><a href="#">Links to committee pages under construction (not yet published to the membership or to the public)</a></p>	<p><b>Your Account</b></p> <p>View your <a href="#">membership account</a> status, renew/upgrade your membership, edit your information, change your password, and create/edit your listing</p>
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## indexers.ca/list-of-pages-under-construction

### List of pages under construction

Committees and other collaborating groups may be working on the following pages, which will eventually be published to the membership or the public.

To start a page for your committee or group, send an email to [administrator@indexers.ca](mailto:administrator@indexers.ca).

To obtain access to a page, ask the page owner to request access for you.

Committee and/or Page Name	Contact	Page URL
New Indexer Resources Committee	JoAnne Burek <a href="mailto:joanne@jburekindexing.com">joanne@jburekindexing.com</a>	<a href="http://indexers.ca/new-indexers-resources">indexers.ca/new-indexers-resources</a>

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### *Report on The Indexer*

We have two topics to discuss. One is about the email that Clare Hooper/Liverpool University Press (LUP) sent to the membership directly. The other topic is about people who don't want to receive the hardcopy issue of *The Indexer*.

The first turned out to be a misunderstanding. During a conversation with people from Liverpool University Press, Mary Coe—the *Indexer* editor, and Ann Kingdom—representing Society of Indexers, it was suggested that ISC/SCI be contacted about the unfortunate circumstance that this issues won't be printed and distributed in Canada.

Unfortunately, Clare took this to mean contacting the membership directly. Jason and I would like to write Clare a little note about sending things to us to send out, rather than sending anything directly.

Discussion: Okay to send a letter to Clare Hooper of LUP regarding direct contact with membership?

The second issue is how to deal with people who don't want a hardcopy of *The Indexer*. So far, nothing has been done about this apart from Julia taking their names off the list when sending it to LUP. Does this mean they don't get access to the online version? Is it okay that they are not getting a major benefit of the Society?

Discussion: What to do?

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### *Rates Survey 2021 Report (Lisa Fedorak)*

#### Committee Members:

Jean August  
Lisa Fedorak  
Martin Gavin  
Wendy Savage  
Julia White

For the purpose of reviewing and compiling the results in a summary, three stakeholders and their needs were considered: the executive, the membership and those considering indexing as a career. The executive would be looking for information to help carry out the Society's mission of education and advocacy; the membership and non-member indexers would want to know the practices and rates of their peers to give context to their own practices and individuals doing research on a potential career would be looking at potential earnings and other related information to make an informed decision.

One key issue with the survey is that while we had a good response (just under 50% of the membership responding, which aligns with other surveys the Society does) effective results are not always able to be drawn out. Some of the questions suffered from a wide interpretation by respondents. These quality control issues are marked in the survey.

### Recommendations to the Executive:

1. The survey results be disseminated in three written forms.
  - a. A Brief Summary text document (Appendix A ) to be used for items to be posted on the publicly accessible portion of the website and in the *Bulletin*. Information of use to potential indexers and members, such as rates and education should be included. The usefulness of the Locator as a marketing tool could be included as a draw for potential members.
  - b. In the membership section of the website, a Summary of Useful Findings (Appendix B) which combines data to accompany the survey (Appendix C) to help individuals understand the data and its limitations.
2. The survey results be presented to the membership in an online meeting to provide a forum for discussion about the results and rates in general. Only current members in good standing would be permitted to attend and it would not be recorded.
3. The survey be undertaken every 5 years in the fall to help determine trends and rates and provide some information to the membership to help them determine their rates. The questions should remain the same or very similar to provide comparative data. Fall is the preferred time to do the survey so that there is plenty of time for the committee to assess the data and present to the Executive before the spring rush. Next survey dates would fall in line with the Membership Survey schedule:
  - a. 2025 fall – present findings in 2025
  - b. 2029 fall – present findings in 2030

### Blue = recommendations for the next survey

Below is a Summary for the Executive of notable information of interest to the Executive. Following that in the Appendices are the Brief Summary for the public and the Findings for the Membership.

### Summary for the Executive:

Of note, one member was using the rates published in the 2008 survey so we do see members using this information.

The survey had a response rate of just under 50% of the membership which was similar to the rates survey of 2008. This survey will compare to the 2008 survey to help provide context for some results.

### Demographics



Age and Sex were not asked this year for reasons of privacy and thus nothing can be drawn regarding what portion of the membership might be nearing retirement which could affect the Society's revenue and number of indexers in the profession.

Include a question to ask if someone is likely to be retiring or leaving the profession within 5 years.

Discuss the importance of knowing the gender, racial and structurally disadvantaged distribution of the membership at five year checks and if deemed useful, ask the question(s).

#### *Respondents by Regions Compared to Overall Membership*

BC 47% all the BC regional members responded

Prairies 31% of the Prairie regional members responded

Ontario 25% % of the Ontario regional members responded

Eastern 24% of the % of the Eastern regional members responded

US & International 55% of the US and International regional members responded

Note: institutional members are included in the overall membership and thus may skew findings.

#### Education

Numbers are very similar to 2008.

#### Groups

A slight decline in the number who also belong to other groups

#### Training

More members are reporting training over 2008 results. Many who do not report training are very experienced indexers.

#### Experience

Compared to 2008, the number of indexers who have 0-4 years of experience was halved from 15 to 7 while the number of indexers who have 20+ years of experience increased from 10 to 15. Some of those new indexers from 2008 may have continued on 15 years later. We are seeing less indexers coming into the profession and this could be a problem for the society with respect to revenue if the trend continues.

Breakdown the years over 20+ (20-24, 25-29, 30-34, 35+) to help gauge longevity and potential retirees.

### Languages

The number of indexers who index in French is down from 6 to 1. One person contacted the committee offline to say they didn't respond to the survey for reasons of anonymity. No other languages were reported, which is down from 2 in 2008.

### Employment Status

5 indexers identified as full-time indexers, yet on later questions identified that they also provided other editorial services. This means that only 12 individuals identify as full-time, with 28 as part-time. As with the 2008 survey, most consider themselves to be part-time. This question still needs to be revised. The question should not revolve around fulltime versus part-time in general as we found that it was open to interpretation. The next survey should focus on the billable hours, as many indexers consider themselves fulltime as they are working on their business, yet they aren't billing fulltime.

### Income

Given that 28 respondents said they are part-time, it makes sense that there is a large portion of incomes under \$40,000.

### Employment in the profession

Most respondents are freelance indexers or independent contractors with 3 as business owners with an employee or who subcontracts to the equivalent of a full-time employee.

### Additional Services provided

19 respondents, a slight decrease from the 2008 survey, provide additional services. Similar to 2008, most provide editing services, followed by proofreading which increased over 2008 and writing (decrease from 2008).

### Marketing strategies

A wide variety of strategies are used. Top are referrals, networking and the ISC/SCI locator, cold calls and a website. LinkedIn is the most successful social media vehicle.

### ISC/SCI Locator

35 indicated that they had a paid listing, and 12 one-third responded they not received a query in the past year. 22 received 1-5 queries and one responded 6-10.

Regarding the ability to translate the query to a client, 5 of those who received queries didn't get a job, and 16 had 1-5 bookings from their queries. This indicates that the locator works and that those who are able to attract a query, have a high likelihood of booking a client.

### Moving Forward

Of note, some respondents claim they cannot set their rates and must accept what is offered. Clarify what is meant by rates (that by accepting work at a certain rate, one is saying that they will work for that rate) and use the term base rates to include the usual rates.

Some questions will need to have language tweaked for clarity to ensure that everyone is responding similarly so that useful information can be gleaned. There are two key areas where wording needs to be address. The first are those related to how would it take you to index a certain work as no measurement was given and thus answers range from 24 hours to 3 weeks. Is the person working a full work day (7.5 hours/day for 5 days a week), meaning it would take 112.5 hours?

The other area that needs reviewing and possibly tweaking is related to full-time employment. There was a wide range of responses regarding full-time pay and some are, in the writer's opinion, slightly disconcerting if the question has been answered correctly. That would be that of the indexers who responded that they work full-time hours of 30+ hours/week, 2 are earning \$10-19,000 annually and another 1 is earning \$20,000-29,000 strictly from indexing. Respectively these rates work out to the equivalent of gross earnings \$12.82/hour and \$19.23/hour or \$1667 month and \$2,500month. For the next survey it is suggested to clarify that full-time means working 30+ hours/week for at least 46 weeks of the year.

A deeper dive into the full-time indexers earning under \$20/hour notes that these individuals have worked at least 3 years in the business, so these aren't indexers just starting out and thus it stands to reason that would have had a full slate of projects in 2020, the survey period This is why I say the numbers are disconcerting to the profession. 11% of the indexers responding as working full-time are charging rates that are below the minimum wage for the majority of the country.

## APPENDIX A - Rates Survey 2021 – Brief Summary

### Rates Survey 2021 – Brief Summary

#### Demographics

Residence

Canadian 73%, International 27%.

Compared to the 2008 survey, there is a 9% increase in international respondents and Canadian demographics by region with changes not large enough to note any trends.

## Education

The group is well educated with all respondents having some education beyond high school. 45% have master's degree, 14% a doctorate, 32% a bachelor's, 7% a certificate or diploma and 2 % an incomplete postgraduate degree. The sample is not large enough to make any correlations between education and earnings.

## Full-time Indexers vs Part-Time

27% full-time, 33% index part-time with additional editing services to equal full-time, 28% part-time, 4% index part time with a job outside the field, 5% still in training or yet to get their first job and 2.3% retiring within the year.

Other services provided included: editing, proofreading, writing, consulting, teaching abstracting, permissions and translation.

## Developing and Assessing Rates\*†

### Developing Ones Rates

ISC/SCI Indexers use a variety of methods to develop their rates. Key to developing their rates include knowing what their peers are charging through listservs, feedback from clients and colleagues and a matrix that takes into consideration indexing speed and business costs.

### Frequency of Assessing and Raising Rates

Most respondents do raise their rates either when promoted by external factors (28% or when they think of it/get around to it (26%). The key reason noted for not raising rates was the worry of losing clients (50%), not knowing where their rates fit into the current landscape.

### Revisions

69% of respondents noted that they include a set amount of hours in their rate for revisions and that might charge for more in some circumstances. 28% do not charge for revisions and will revise until the client is happy. 3% will charge for any and all revisions.

The rates ranged from \$20-24/hour to \$65-75/hour. The median rate was \$47.00

### COVID-19 and rates

The majority of respondents say COVID-19 has had no effect on their rates or income although two indexers noted that they have seen more shopping for lower rates, and higher rates have not been taken up as much as before.

## The Rates

Respondents were asked to quote on three open source texts, one a trade book, scholarly book and textbook, using their normal range of rates and via their preferred method to help remove the ubiquitous “it depends”.

*Trade Book: The Life and Adventures of Frank and Jesse James* by J. A. Dacus 318 pp

- Quote by page: range from \$4.00 to \$6.00 per page median = \$4.38/page
- Quote by project: range from \$900 to \$2,000 per project median = \$1,355

*Scholarly Book: Dream Machines* by Steven Connor 188 pp

- Quote by page: range from \$5.00 to \$7.50 per page median = \$6/page
- Quote by project: range from \$1,000 to \$2,750 per project median = \$1,200

*Textbook: Graphic Design and Print Production Fundamentals*    pp

- Quote by page: range from \$3.00 to \$6.50 per page median = \$5.00/page
- Quote by project: range from \$750 to \$1,500 per project median = \$1,200

\* All rates in Canadian dollars

† An exchange rate of 1.2401 was used to convert USD to CAD for those who quoted in US dollars based on exchange rate for survey dates.

## Marketing

A wide variety of marketing techniques were used to market services, with all those listed used\*\*, by at least one person except for Google Ads. The most commonly used were word of mouth (86%), the ISC/SCI “Find an Indexer” paid listing (75%), a website (70%) and networking (61%) as the top methods.

The methods that brought in the largest percentages of clients were the ISC/SCI “Find an Indexer” paid listing, networking, the ASI Locator with cold calls and website tied.

### The ISC/SCI “Find an Indexer” paid listing

52% of respondents with an ISC/SCI listing report getting at least one client through the listing. Of those who receive a query through the listing, 70% report acquiring 1-5 clients through the listing.

### Where do the Clients come from?

Trade publishers, university presses, authors and packagers were the largest ranked sources of clients with corporations, governments, and non-governmental organizations similarly ranked.

## EARNINGS FROM INDEXING

Reflecting the large number of respondents who consider themselves part-time indexers, 67% reported income of \$0-39,999, 9% at \$40,000-59,999, 13% at \$60,000-\$99,999 and 9% over \$100,000 with 2% reporting n/a.

## APPENDIX B

See Summary of Useful Findings document (unable to past into here due to graphics)

**12.**