



INDEXING SOCIETY  
OF CANADA  
SOCIÉTÉ CANADIENNE  
D'INDEXATION

**Annual Report, 2022–2023**

**June 9, 2023**

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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 the public are treated to Canadian and international speakers on the topics of indexing, publishing, and the business of freelancing.

Our regional groups host meetups regularly, 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 with 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.

### ***Slate of Nominees for Executive Committee, 2023–2025***

<b>Position</b>	<b>Name</b>
Co-president	Jolanta Komornicka
Co-president	Maggie Billard
Membership	Tanvi Mohile
Treasurer	JoAnne Burek
Communications	Céline Parent
BC Regional Representative	Judith Nylvek
Prairies and Northern Regional Representative	Jess Herdman
Central Regional Representative	Ronnie Seagren and Emma Johnson
Eastern Regional Representative	position open
Bulletin Managing Editor	Vicki Gregory

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<b>Position</b>	<b>Name</b>
Website Administration	Christine Dudgeon
Website Developer	JoAnne Burek

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***Appointed Positions***

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<b>Position</b>	<b>Name</b>
International Liaison	Margaret de Boer
Recording Secretary	Patti Phillips

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# Reports from the Executive Committee

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## *Co-Presidents' Annual Report, 2023*

### ***Jolanta Komornicka***

Coming in as co-president late this summer has been a wild ride, but a great one, and that's all thanks to the strength of this Society. Membership remains healthy and we keep adding new initiatives. We have the new library, which is getting underway with books in hand, a robust procedures document, and plans for exploring digital lending in the future. The Member-Initiated Groups (MIGs) project begun last year continues to go strong and we encourage more members to think about any discussion or working groups you might like to have. Our rates report is finally going out, which I know will be a big help to indexers new and old. This year we partnered with The King's University in Edmonton, Alberta, to better help people make the career transition into indexing. Resources developed by the amazing students at Kings can soon be found on our website. ISC/SCI is continuing to get the word out about indexing to potential clients. We annually contact publishers about the work our wonderful indexers do and this year we'll be attending no less than three conferences, where we'll have booths up in the exhibit halls to talk to authors and publishers: at Congress of the Humanities and Social Sciences (May–June 2023), Editors Canada (June 2023), and Word Vancouver (September 2023). We've also gotten our webinars series off the ground, with Ælfwine Mischler giving our inaugural webinar this March!

It's really been an incredible process watching all of this take shape just in the short time I've been on the executive and co-president. Well done to all of you for making this Society not just a welcoming place, but a down-right useful one!

The executive committee has seen a lot of changeover this year. Apart from my replacing Tere Mullin as co-president, Maggie Billard has joined Ronnie Seagren as co-rep for Central (Ontario), Judith Nylvek has replaced Matthew MacLellan as BC rep, and Barbara Cuerden has come in as Eastern Rep.

I want to give a special thank you to Alex Peace. As she prepares to step into the role of past president, I want her to know that all her incredible work over the past several years has paid off. I would be a whole lot more nervous continuing on without her if it weren't for all the guidance she's given me the past many months and the hard work she's done setting up the documentation for the Society to ensure that everything will continue to run smoothly.

### ***Alexandra Peace***

It's hard to know what to say as I wind down my involvement in the Society. I will still be on the executive committee as past president, but with much less responsibility (and hardly any reports!!!!). I have thoroughly enjoyed being president of ISC/SCI for the past seven years (and

Eastern rep for two years before that). Through the incredible efforts of our volunteers, we have seen many good programs start up, documentation written down and saved, and we've had a lot of fun while doing it!

It was a pleasure to work with Tere Mullin as co-president. We worked well together. While Tere was unable to carry on as co-president, I am so glad to know that she is still a member of our Society.

I was very pleased to welcome Jolanta Komornicka as our new co-president. She jumped into the position with both feet. I have been passing things to her at a fast and furious rate, and she has not only kept up but has also initiated her own projects. I'm sure you will be pleased to have Jola leading you into the next year.

A main focus of my presidency has been to document what we are doing and how. Of course, these documents are open to change, but at least they give the incoming folk an idea of where and how to start.

I hope you will join me in wishing Jola good luck, and don't forget to thank your volunteers with a Magpie Kudos!

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### *Membership Report (Julia White)*

Since the last AGM report, membership numbers have declined to 131 from 135, representing a 3 percent decrease. Excluding honorary memberships, the number of members is unchanged compared to last year.

Despite this year's decrease, membership numbers are still 5.6 percent higher compared to two years ago.

Total Canadian memberships were down by eight (-7.2 percent) on a year-over-year basis. The decrease in Canadian memberships was led by Ontario, where membership numbers declined by six. Alberta, Saskatchewan, Nova Scotia, and Quebec also saw small decreases.

Among the provinces, British Columbia saw the largest annual increase in membership numbers, with a rise of four. The number of members in Manitoba increased by one, as well. Membership counts were unchanged in New Brunswick and PEI.

The number of international members increased by four (+16.7 percent). Our international members are from Australia, Egypt, India, the Netherlands, the United Kingdom, and the United States.



	April 2023	April 2022	May 2021
<b>Total</b>	131	135	124
Canada	103	111	103
International	28	24	21
<b><i>Paid Memberships</i></b>			
Basic Individual	36	39	32
Listed Individual	78	74	72
Student	2	2	2
Institutional	7	8	11
<b><i>Honorary Memberships</i></b>			
Emeritus	4	4	3
TIDE Bursary	3	3	2
Basic Trial	1	5	2

This year the Membership Secretary

- Maintained and updated the Membership Secretary Manual
- Maintained the membership lists for the Society
- Maintained the isc-I and the executive list-servs
- Liaised with SI regarding mail delivery and digital access to the *Indexer*
- Assisted individual members with their questions
- Attended executive meetings via Zoom
- Sat in on national members' video chats
- Acted as executive liaison for the Survey Committee

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

### **Executive Summary**

In the fiscal year ending March 31, 2023, the Society had an income of \$33,435, of which \$18,902 is attributed to operating revenues, \$14,360 is attributed to the 2022 and 2023 conferences, and \$173 to interest.

The operating revenues include fees for membership, Find an Indexer, Ewart-Daveluy Award nomination, mentorship program, and for the sales of pins.

Total expenses were \$14,377 for ongoing operations, \$4,139 for 2022 and 2023 conference expenses, and \$4,900 in one-time costs. In the ongoing operations, we incurred \$8,463 directly for members. This consists of \$7,877 for *The Indexer* subscriptions and \$586 for credit card fees for membership payments. Other large items in ongoing operations include the *Bulletin* at \$823, and the website and listserv at \$1,818.

Our website costs have increased over the previous year because we moved to a larger hosting service. Our website has become much more than just a blog, and we needed the extra capacity.

The one-time costs include \$2,100 for the paid consultant that moved the emails to the new hosting service along with the website. Another cost was the \$1,447 for the exhibitor booth at the 2023 Congress of the Humanities. This is the first time we have had a booth. Up to now, we have only bought advertising on the Congress website or in the program. The TIDE project cost of \$1,174 covered the fourth bursary.

We finished the fiscal year with a profit of \$10,019, however \$6,850 will go toward the 2023 conference.

The balance sheet remains strong with \$48,458 in cash and \$13,974 in investments, for total assets of \$62,432.

### **Conference Surplus Fund**

Our policy is that conferences should break even. However, the costs of in-person conferences varies with the location. To maintain consistent conference pricing year over year regardless of location, we earmark a portion of the balance sheet as a conference surplus fund. The fund is supported by profits from virtual conferences as well as any in-person conferences that may generate a profit. As of the 2022 conference, the fund has accumulated to \$9,399.

## ***Proposed Budget for 2023–2024***

This year, the operating part of the budget reflects the return to in-person meetings and travel as well as increased promotion. Our expected profit from ongoing operations is much closer to break-even at \$238.

Under Extraordinary and Special Projects costs, the executive committee voted unanimously for projects and activities amounting to \$13,516 over the year. These include expansion of the lending library project, having a booth at both the Editors Canada conference and Congress of the Humanities, and becoming a registered non-profit organization. As usual, we set aside \$2000 for unknown new projects.

The budget presented here includes just the operating costs and revenue. Conferences have their own timeline and are budgeted separately by the year's conference committee, supported by the conference surplus fund mentioned above.

## ***Highlights 2022–2023***

**First Quarter (April to June 2022):** Compilation of fourth quarter and year-end 2022–2023 financial statements as well as finalization of the 2022–2023 budget.

**Second Quarter (July to September 2022):** Preparation and posting of second quarter financial statements.

**Third Quarter (October to December 2022):** Preparation and posting of third quarter financial statements.

**Fourth Quarter (January to March 2023):** Preparation and posting of fourth quarter financial statements and preparation of a draft budget for 2023–2024.

**March and April 2023:** Compilation of fourth quarter and year-end 2022–2023 financial statements and finalization of the 2023–2024 budget.

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

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

### ***General/Miscellaneous***

- Publicized change in co-president (Bulletin, membership, web administrator, distribution list as appropriate, and social media)
- Social media posting requests, such as for DReam Scholarship winners, throughout the year.

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

- No 2022 award was given, and the committee did not wish to issue a public statement beyond the website notification.
- Sent out call for 2023 submissions announcement to sister orgs and requested social media posts. [December 15, 2022]
- Sent blurbs for Editors.ca newsletters to Michelle Ou. [December 15, 2022]
- Sent out call for submissions reminder for 2023 competition [January 25, 2023; March 1, 2023] and requested social media posts [January 27, 2023; March 1, 2023]

### ***Student Letter***

- Requested update to student letter for new co-president. [August 28, 2022]
- Recommended that the student letter be positioned as a public-facing (rather than hidden) document on the ISC/SCI website in New Indexer Resources for maximum findability for instructors of indexing, current students of indexing, and people considering a career in indexing. [September 17, 2022]

### ***Tamarack Award***

- Sent out French and English press releases for 2022 winner. Sent editors.ca contact short pieces for the editors.ca newsletters (Fr/En). Sent blurbs for posting on social media. [June 14, 2022]

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

- Sent out announcements for the 2022 call for applications to distribution list, requested social media posts, and sent information to editors.ca contact for the newsletter (Fr/En). [July 1, 2022]
- Requested update on social media to announce extended deadline. [September 12, 2022]
- Sent out press release announcing the 2022 winner. [November 17, 2022]
- Requested social media posts for 2022 winner. [November 17, 2022]

### ***ISC/SCI Annual Conference 2023***

- Sent out save the date announcement to distribution list. [October 16, 2022]
- Requested social media posts [October 16, 2022, January 12, 2023; January 15, 2023; January 24, 2023, February 7, 2023, February 14, 2023; February 21, 2023; multiple requests in March; multiple requests in April, will be ongoing through June event]

- Sent 2023 conference scholarship announcement [January 24, 2023]
- Sent press release about open registration to distribution list [February 21, 2023]
- Sent early bird reminder to distribution list [April 17, 2023]

### ***Social Media Campaign***

- At the request of co-president Alexandra Peace and then-co-president Tere Mullin, created a social media campaign: **12 Reasons to Become an ISC/SCI Member**. The campaign consists of twelve posts with accompanying hashtags to be posted sequentially, one per month over one year, on ISC/SCI social media accounts. The executive committee has placed the project on hold.

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### ***British Columbia Regional Report (Judith Nylvek)***

Judith Nylvek became the BC Region rep in November 2022.

BC Region meetings were held on December 7 and February 1; no meeting was held in April.

Two BC members attended the December and February meetings.

Carlisle Froese joined the February meeting to talk about the Mary Newberry Mentorship Program.

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### ***Prairie and Northern Regional Report (Liese Achtzehner)***

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

I hosted regional meetings over Zoom in June, August, December, February, and April. Attendance at the meetings tended to consist of a core group, usually with around three to five people at each one. Depending on my availability, I did my best to schedule meetings at times when the most people could attend.

Prairie and Northern region meetings have been informal in nature. Topics of conversation usually centred around what we were indexing, work-life balance, indexing resources, and solving indexing problems, but sometimes we talked about other things too, like gardens and baking and the weather.

In February, the mentorship coordinator came to talk about the mentorship program—this meeting was very well attended with a good mix of new and experienced indexers.

I have decided not to stay on with the ISC/SCI executive. I look forward to volunteering with the ISC/SCI in other ways and perhaps rejoining the executive at a later time.

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## Central (Ontario) Regional Report (Ronnie Seagren, Jolanta Komornicka/Maggie Billard)

Jolanta Komornicka left to become co-president. Maggie Billard joined in November as co-representative for the region. Our list includes about fifty-five people in Ontario, about twenty-eight non-members who are in Ontario, nine beyond Ontario, plus the regional reps. Most meetings this year were about nine or ten people on Zoom. We decided to hold meetings alternating Saturdays and Tuesdays to accommodate people who aren't available for Saturdays. We have identified Emma W Johnson to run for election for co-rep when necessary.

**September 24:** We had a small meeting at Norway Park on the waterfront where we looked at indexing fiction. We started with an article from the *Indexer* and then talked about fiction that had indexes, and fiction that we'd like to index. We didn't meet in October because several members were just getting back from or had just listened to the Berlin conference.

**November 26:** Maggie's first meeting as host as Ronnie was away. We spoke about Bad Indexes. We had from seven to nine participants, including two of our American members. There were a lot of varying opinions on what makes a bad index, which means something different to indexers, publishers, and authors. Really interesting!

**January 28:** We spoke about Markup. We had ten(ish) attendees. We had some attendees who markup extensively, some who don't at all. We talked a lot about what counts as markup, which was interesting to consider. It's not just marking up beforehand. A surprising number of indexers print out a final copy to edit! Carlisle attended to discuss the mentorship program.

**February 28:** We spoke about biographies, memoirs, and metatopics. This turned into a really in-depth discussion of metatopics, with demos from Ælfwine and Ronnie, and good stories from other members about how to deal with metatopics, when to use alphabetical subheadings, multiple headings for the same topic, and how to cut an index down. Our first Tuesday meeting was a success!

**March 8:** We hosted the national chat. We didn't have a set topic, so we decided, since Ronnie had had a snafu with her last index, that we would ask people for one time they had had a big disaster they had to overcome. Everyone had one story they could tell; people were so engaged that we went way beyond time.



**March 25:** We spoke about contracts. This was a very engaging discussion with lots of good/harrowing stories and strong opinions. We plan to write an article on this because people wanted to know more. Eleven people attended. Maggie finally remembered to take a picture.

**April 25:** Twelve of us gathered to look at where indexers' jobs come from. First, we watched a very short explainer video that the TIDE committee did about what an index is and provided some feedback. The rest of the meeting was a very lively discussion about where we've gotten jobs. We discussed university presses, direct author contacts, referrals, listings in directories for indexers and editors, packagers, subcontracting, the list-serv, university job boards, and so on.

Likely over the summer we will have at least one in-person meeting in Toronto.

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### ***Eastern Regional Report (Barbara Cuerden)***

Barbara became Eastern Region Rep in the Fall of 2022, taking over from Tere Mullin. We've had five new members added to the region.

The Eastern region chat was held August 16th, when Barbara was introduced, and Alex co-hosted the Zoom, assisting Barbara. Introductions were made, we chatted generally and then discussed Barbara's latest index.

We hosted the National Chat Sept. 11th. Ronnie Seagren co-hosted.

On October 19th we reviewed the Berlin conference, remote and on-site experiences.

Our meeting on January 15th discussed the upcoming ISC/SCI conference in Newfoundland, and guest, Carlisle Froese, introduced the mentorship programme as well as the new lending library.

April 19th featured two guests, Heather Ebbs and Jolanta Komornicka, speaking about starting points in their respective careers and adapting to conditions and "positions" in time.

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### ***Bulletin Report (Vicki Gregory)***

Since the last AGM, we have successfully published three more *Bulletin* issues and received positive feedback. All the publishing steps work quite smoothly and within the confines of all

our busy schedules. I'm very grateful to all the team members who make these issues possible and the writers who send in fantastic content.

Jolanta Komornicka is now working with Gillian Watts on the copyediting. Our new feature, Editor's Corner, brings an important awareness of language changes to our indexes.

At this time, the summer issue is in the works and will include coverage of the ISC/SCI in-person conference in St. John's. We welcome all suggestions and article ideas for future issues.

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## ***Website Administration (Christine Dudgeon)***

The Website Administrator is responsible for maintaining the website, adding new content, and offering support for members with technical problems. The role also involves managing the @indexers.ca emails (approximately 40) and managing the Dropbox folders, Zoom account, and social media accounts.

### ***Web Host Move***

In January 2023, we moved the indexers.ca website to a cloud server because we were frequently reaching capacity with our previous host. We were finding that no one was able to access the website at certain times, and this was occurring more frequently despite efforts to streamline functions. Our website is quite complex with the membership registrations, conference, Find an Indexer, calendar of events, and other valuable resources for our members. The move went well with some minor glitches and setting changes needed to have everything run as before. The @indexers.ca email move to the new host was a manual effort but went smoothly overall.

### ***Conference Website Modifications***

The conference section of the website was improved and now includes a separate blog where posts on the attractions of the conference location are found.

### ***Other Website Updates***

Ongoing improvements, updates, and additions to the website have occurred throughout the year. The Resources page now has a Reference Websites page linked to it. The Ewart-Daveluy Award page and the Diversity in Canadian Publishing Bursary page have both been updated and improved for applicants and the committee members.

### ***Lending Library***

With input from the lending library committee, a web page and form are being set up to begin the pilot project.



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

ICRIS (International Committee of Representatives of Indexing Societies) 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, in April and September at a time of day palatable for all representatives. While Australians were getting ready for bed, Canadians were ready early in the morning with a cup of tea.

The highlight of the year was to finally see indexers in person again and the cherry on top was to see them at the conference in Berlin. Seven ISC/SCI members were in attendance too.

Every 3 years, the ICRIS representatives review the agreement that governs the activities of ICRIS members. At this meeting on October 16, the International Agreement and its Terms of Reference were approved with amendments. The amendments mostly involve the terms of reference for our online Zoom meetings, which were not in existence 3 years earlier. Major amendments to the Agreement were not required.

The document changes were made and have since been received by all societies. We, as an executive committee, gave formal consent to the International Agreement and Terms of Reference amendments. All other society executive committees also ratified the amendments. The agreement is available on our website.

The other big news is the development of the International Indexers website proposal made by ANZSI (Australian and New Zealand Society of Indexers.) After much discussion by society representatives, it was decided to have a website with simple functionality with links to all society websites. There was concern about the amount of volunteer work required to develop a more elaborate website. As indexing becomes a more global effort, we're pleased there is agreement for this website to facilitate greater awareness of indexing around the world. The details are still being worked on but look for exciting news in the near future.

Finally, 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.

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## *Past President Report (Margaret de Boer)*

The role of past president is generally a quiet role, particularly when there are two capable co-presidents at the helm.

However, the co-presidents may call upon the past president to perform specific tasks.

This year, because it is an election year, it was to work on the succession committee, an ad hoc committee whose function is to identify any openings on the executive committee and approach members willing to be nominated for 2023–2025. Typically, the past president would have good knowledge of the membership, having been involved with ISC/SCI activities already for a number of years.

With Judith Clark, the ISC/SCI Communications Director, we met to discuss and divide the workload. Over the past months we have been busy emailing members, and are very pleased to be able to present a full slate of nominations for every position on the executive committee.

Both Judith and I are grateful to the members who accepted their nomination. They are extremely competent members well suited to their position.

ISC/SCI will be in good, capable hands!

# Reports from Standing Committees

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## *Archives Committee Report (Christine Jacobs)*

### **Completed**

We did not have an intern this year, but we did meet and settle on a form to gather the data on what types of documents are being kept by the various executive and former executive members. This will be circulated this spring.

### **Next Steps**

1. Surveying of record holders
2. Decision made in conjunction with the Board about file storage options
3. Setting up of additional file structures if/as necessary
4. Commence gathering files that fall under the retention schedule

### **Committee**

Christine Jacobs (Chair)  
Carlisle Froese  
Siusan Moffat  
Gillian Watts

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## *Book and Periodical Council Report (Ronnie Seagren)*

### **Annual General Meeting**

The BPC AGM was held October 27, 2022. It included reports by committees and election of the Board for the next year. It was a very busy year which included the first online book summit, Freedom to Read Week, social media, webinars and member hubs, a reduction in health benefits premiums, the book freight program, and the 2021 Book Summit. They received Canada Council and Canadian Heritage grants and had an intern, who was quite productive. Financially, they improved their bottom line by closing their office. They received a Work and Culture Fund grant for 2023. Canada Council, however, turned down the grant for Freedom to Read Week in 2023. In a roundtable, each member organization, including us, shared a report on their activities.

### ***A few highlights***

- The Publishing 101 course was expanded and may be held again in October by the Association of Canadian Publishers and might be of interest to ISC/SCI members. The sessions can be viewed online at <https://sites.google.com/canbook.org/acppublishing101/>. The password is Access!Publishing101 (not to be shared outside our organization).
- You can download the results of the 2022 [Diversity in Canadian Publishing survey](#).
- Several organizations are updating their bylaws and making other efforts to foster a more diverse and inclusive membership and board.
- The Canadian Publishers' Council is also "thinking hard about diversity, equity and inclusion." They did a social media campaign to attract new people to the field, and through IndSpire, they offered ten scholarships to Indigenous students with government matching, focusing less on English Lit but more on technologists, financial expertise, leadership, and other career paths in publishing.
- Several groups have been active in copyright lobbying.

### ***Special Members Meeting***

On March 7, 2023, BPC held a special meeting of members to discuss realistic changes toward a more stable position by 2025, when they'll mark fifty years. The board presented the 2023–2025 Strategic Revisioning Plan, with the following highlights:

- Find a new partner to continue the Freedom to Read campaign.
- Continue health benefits for members, freight and distribution, administration for CCI.
- Hold two member hubs on June 22 and October 5 for news sharing, and five learning sessions for members on topics such as HR policies, freedom of expression, DEI, etc.
- Reduce the one staff person to three days/week and do succession planning if the ED departs.
- It's a deficit year but they have reserve funds and are working on fund development initiatives.
- In the second year, revisit the membership structure and recruit new members.

The next AGM will be in June 2023.

### ***ASI Workshop with the US Book Industry Study Group (BISG)***

The workshop, called "Index Confidential: A conversation about how indexing can make better books," was held on March 22, 2023. They each presented on different aspects of indexing and how they work with publishers and authors. Kate Mertes talked about how the email chain serves as a contract, communicating during indexing, and what happens on receipt of the index and follow up. Devon Thomas followed up with how search is a blunt tool

compared to an index, which provides context, connections within the text, and the ability to present context, metaphors, and the author's position on a topic. She also discussed electronic publishing, embedded indexing, and linking. Ronnie took notes, which will be in Dropbox.

### ***Proposals for an Indexing Workshop with BPC and Promoting Indexes in Amazon's Look Inside view***

Lisa Fedorak suggested we do a call to action that asks publishers to make it a policy to include indexes in Amazon's Look Inside view. We'd let them know that indexers link to the Look Inside feature as part of their marketing, which also helps to raise awareness of their book. We could highlight the relevant steps (from the FAQ) to make it as easy as possible for them to implement:

[https://www.amazon.com/b?node=23972967011&ref=cs\\_fdm\\_1001119751-23972967011](https://www.amazon.com/b?node=23972967011&ref=cs_fdm_1001119751-23972967011)

Before hearing about the BISG workshop, Ronnie already spoke with Annie about the possibility of doing a workshop with members about indexing. She suggested the fall.

Ronnie suggests a three-pronged approach for Lisa's suggestion:

- Include the Look Inside benefits in the workshop with BPC (probably in the fall).
- Send a mailing to publishers through their association.
- Encourage indexers to mention it to their publishers or authors (provide some canned text).

Ronnie still suggests that the BPC liaison role is best filled by someone who's doing more active indexing.

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### ***Conference 2023 Report (Alexandra Peace)***

We started off this conference year with a head start . . . much of the venue/location work had been done back in 2020. Murray Premises agreed to honour our previous contract and prices, including the room prices for attendees!

This year the committee consisted of Lisa Fedorak, JoAnne Burek, Maura Brown, Mercedes Brian, and me (Alexandra Peace).

Lisa sent out a call for proposals and received three. Some of the people she contacted were unable to come to Newfoundland but were interested in presenting another year.

We negotiated with the Gypsy Tea Room, a separate company but within the hotel, for catering the conference and for our banquet.

Merce regularly published information about the conference, about Newfoundland at the beginning, and about our speakers as we got information about them.

JoAnne set up registration and added some of the other pre-conference events as well. She has been trouble-shooting as we go.

Maura is gearing up now to create all the documentation . . . program, map, banquet ticket, badges, and so forth. All is well in hand.

The conference budget looks to be on track . . . We will be spending more money than we bring in, as per instructions from the executive committee. Our online conferences have made money for the past two years, so we have extra money to spend at our in-person conference.

As of this writing, we have thirty-nine people attending the conference, with thirty attending the banquet and thirty people attending the boat tour.

This year, because we are holding the conference in Newfoundland, we added an extra event, to be held on the Wednesday before the conference. JoAnne organized a PuffinPalooza!

On the Thursday, we will be having various meetings: conference committee, executive committee, ICRIS, and a Fireside Chat for new indexers. We have also organized pre-conference icebreaker (hopefully not literally) of a boat tour with Iceberg Quest to see whales and icebergs. We will also have a pre-conference dinner at the Fish Exchange.

Our eleven sessions will be held over two days. We will have our AGM at the end of the first day, followed by our banquet where we will give out the Ewart-Daveluy Award and Certificates of Recognition.

On Sunday afternoon, Stephen Ullstrom will be giving a workshop.

Because Newfoundland is so far away from the rest of Canada, some funds were allocated for the executive committee to travel to meet face-to-face. See the report for details.

Years ago, we instituted a bursary to help new members get to the conference, and we finally were able to get that going. See the report for details.

Finally, Lisa started a member-initiated group . . . a group dedicated to reading books about Newfoundland or by Newfoundlanders. See the report for details.

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## ***Ewart-Daveluy Indexing Award Committee Report (Audrey McClellan)***

### ***Presentation of 2022 Award***

The ISC/SCI Ewart-Daveluy Indexing Award was not awarded in 2022. The committee (Judy Dunlop, chair; Audrey McClellan, François Trahan, and Stephen Ullstrom) received several good submissions, but committee members unanimously decided that none of the indexes reached the level of excellence that merits the award.

### ***Announcement of the Winner***

In response to the committee's proposed policy on when and where to announce the Ewart-Daveluy Award winner, the executive agreed that for in-person conferences, the award should be presented at the banquet along with the presentation of other awards. If there is no award winner, an announcement to this effect will also take place at the banquet. For virtual conferences, the executive has agreed that the announcement, whether or not there is a winner, should take place in between presentations on the first day of the conference.

The executive also agreed that the committee, in consultation with the communications director, should prepare a statement in the event that there is no E-D Award winner. This would serve as the announcement to be delivered in lieu of an award presentation. It would also be posted on the website and distributed via the members' mailing list.

### ***Banquet Tickets for Winners during Covid***

The committee hopes that Ewart-Daveluy Award winners announced during the pandemic, when the conference was virtual, will be in Newfoundland so they can be recognized at the banquet during the 2023 conference. Congratulations to Anna Olivier and Carla DeSantis (joint winners in 2020), and Stephen Ullstrom (winner in 2021)!

### ***Submissions***

Deadline for submissions was March 15, 2023, for books published in 2021 and 2022. 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 the conference in June 2023.

### ***Committee Members***

Audrey McClellan, François Trahan, and Stephen Ullstrom

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### ***Lending Library Report (Carlisle Froese)***

Over the first year of the ISC/SCI lending library program, we have accomplished a lot. We are excited to be going into launch, ready to start sharing the compiled resources with indexers across Canada. In the past year, we have written and reviewed policy, compiled a collection of resources for lending, and begun to research the process of creating a digital library to balance the physical collection.

The ISC/SCI lending library program began with the generous help of ANZSI (Australian and New Zealand Society of Indexers), who runs their own library and shared their policy, collection list, and process with us as we set forth. The committee is grateful for their help. From there, we created a tailored policy, adjusted to the challenges of members spread not only across Canada but around the world. One early challenge that quickly became clear was that it would not be possible to extend the library benefit to members outside of Canada due

to the cost of shipping books and the laws surrounding digital use of resources. Unfortunately, this was not something that could be overcome, but we did solidify a cost-effective way to ship resources across the country.

Once policy work had started, the committee worked to create a wish list of resources for purchase paired with a call for donations from membership. Some books in the lending library collection were purchased with the allotted budget from the executive committee but the vast majority came from the generous donations of ISC/SCI members across the country. We were overwhelmed by the generosity of members who opened their bookshelves to share resources, some costly or difficult to find, with their fellow indexers. These generous members include Cameron Duder, Christine Dudgeon, Marnie Lamb, Frances Lennie, Mary Newberry, Anna Olivier, and Stephen Ullstrom. We will continue to add to the collection as books are found or donated, updating the library booklist as books are added. We did make the decision to limit the collection to books, avoiding periodicals, to keep the collection streamlined and in interest of the fact that many are available already online.

We are currently working with Christine Dudgeon to create the lending library members' webpage. This page will include the library booklist, policy, and a form for potential borrowers to fill out when they request a book. We believe that this site will allow for a streamlined and accessible process for members to get their names in for books. This site has launched! The committee is incredibly grateful to Christine for her help, expertise, and work.

We want to acknowledge that at this moment there are two areas that are lacking in the ISC/SCI lending library program. First and foremost, the collection is currently limited to English texts only. The committee is limited by the fact that we work in English and do not have the confidence to decide on useful French resources. It is very important to the committee that this be addressed. We have reached out to French indexers who are currently helping us find valuable French resources to ensure that the library collection reflects the linguistic diversity of ISC/SCI members. Second, the lending library will be launched as a physical collection only. Digital collections, though accessible, are more difficult to put together due to copyright laws, etc., so this has been a slower process. We are still moving forward with making sure that this half of the collection will launch down the road, but we wanted to make sure that the library was accessible as soon as possible. The committee is incredibly grateful to Jolanta Komornicka, who has spearheaded the efforts to research the use of digital copies of resources, digital libraries as a whole, and the laws in Canada surrounding these efforts. She has moved mountains to make sure that the digital lending library crosses all its technical t's and dots its i's.

Moving forward, the lending library has a few goals. Beyond addressing the French and digital challenges listed above, we are beginning to explore the idea of tracking book shipments across the country and purchasing carbon offsets to address our environmental impact. This goal reflects ISC/SCI's commitment to having a positive impact on the world around us. We would also like to track the library's use by members over the coming year to decide whether the current model of housing the collection in central Canada to send all over



is the most feasible or if the program will be popular enough to warrant splitting the collection East/West to control cost, wait times, and environmental impact.

### **Committee**

Carlisle Froese and Margaret de Boer

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### ***Mary Newberry Mentorship Program Report (Carlisle Froese)***

The past year has been an exciting and productive one for the Mary Newberry Mentorship Program. There have been a number of successful mentorships completed with some still underway. Applications continue to come in and I am excited to see what matches can be found.

This program would not be possible without the generosity of the mentors and the continued interest of the mentees. The ISC/SCI and the Mary Newberry Mentorship Program continue to be grateful for the number of mentors that have worked with mentees and those that have indicated that they would be available to participate in the program. Active mentors this year include: JoAnne Burek, Jolanta Komornicka, Sergey Lobachev, Mary Newberry, and Noeline Bridge. The program is incredibly grateful for their time and dedication. The wonderful mentees that have participated this year have spent their time learning and have offered some incredibly helpful feedback that will continue to improve the program moving forward. Finally, I would like to thank Margaret de Boer, who acts as the executive liaison for the mentorship program, and Tere Mullin, the former program facilitator, who continues to be a valuable resource.

Going forward, the goal continues to be to connect members of ISC/SCI who want to challenge themselves to learn something new to the generous members willing to share their time and knowledge in the interest of creating great indexes. I hope to accomplish this by promoting the program through various mediums to keep the program front of mind and making myself available to members. Finally, I am hoping to increase recruitment outreach to increase the roster of available mentors in various subjects.

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### ***Member-Initiated Groups (Jolanta Komornicka)***

After beginning the initiative last year, ISC/SCI continues to run Member-Initiated Groups (MIGs). MIGs are managed and led by an ISC/SCI member. Their purpose is to facilitate indexers learning and networking with other members around a specific topic.

MIGs provide opportunities for members to learn, communicate, and collaborate with one another. It's one more benefit of being a member of ISC/SCI!

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-members as participants.

Currently, there are three MIGs running and more in the offing. The currently active ones are

- Indexers Book Group, run by Jolanta Komornicka
- Newfoundland Book Club, run by Lisa Fedorak
- Accountability Group, run by Lisa Fedorak

The CINDEX study group run by Matthew MacLellan has finished.

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

In 2021, we identified a recurring need coming from new and aspiring indexers. They were all asking the same broad questions—How do I become an indexer? How do I get clients? How do I manage my freelance indexing business? It was natural that they should look to the Indexing Society of Canada for the answers. But all we could do was share our stories and opinions in the monthly and national chats.

We asked, What if we could gather the collective knowledge and wisdom of our experienced indexers and make it available in one place?

And that is how the New Indexer Resources Committee was started.

From the outset, the committee was confident that a fun and intuitive way to make resources available would be with an FAQ page. We launched the page in March 2022 with thirteen “how-to” articles on some burning questions. The questions ranged from the general (*How does one become an indexer?*) to the specific (*What are some ways that indexers market their services?*) to ones you might not think of but should (*What information should I track for my indexing business?*).

Now that the page has launched, the committee’s activity has pivoted to adding new articles as we think of them. Currently, we are going through the e-book *Newcomers: A selection of articles for those new to indexing*. This book is a collection of articles from *The Indexer*. The e-book is no longer published (due to copyright issues, we heard) but all or most of the articles in it are free to access. The book is a rich source of ideas for our page. It lets us pose questions that can be answered in detail by linking to the relevant article at the Liverpool University Press website.

The committee members are JoAnne Burek, Jannaya Friggstad Jensen, and Patti Phillips. Jannaya recently submitted our newest article aimed directly at our clients and indirectly at the public: “What editors and publishers want to know: What makes a good index?”

Researching and writing for the New Indexer Resource project is a rewarding activity. It forces you to think about your own business and practices and learn how others are doing it. I am grateful to my fellow committee members and to the support from the executive committee for this project.

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### ***Outreach Committee Report (Siusan Moffat)***

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

#### ***Diversity in Canadian Publishing Bursary for Indexers***

For three years TIDE has offered the bursary 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. This project is currently scheduled up to and including 2024. We of course want to keep it going past that!

We chose our fourth winner in November 2022. Here is a little bit about her: Tanvi Mohile is a PhD Candidate in the Department of English and Film Studies (EFS) at the University of Alberta (U of A) in Edmonton. She was born and raised in Mumbai, India, and she moved to Edmonton in 2018. She has a Bachelors in Microbiology and a Masters in English Literature.

Tanvi’s love for words and books began at an early age, and she hopes to work in publishing after the completion of her degree. She has previously worked as an academic editor and a lecturer in Mumbai. At the U of A, Tanvi was the first intern to work at the University of Alberta Press under EFS’ PhD Concentration in Editing and Publishing. Over the four terms of her internship, she learned the nuances of scholarly publishing, which further intensified her interest in the field. Since completing her internship, Tanvi has worked on several projects as part of research assistantships, the most recent of which involved editing a book manuscript and creating an index for it. This was Tanvi’s first experience with indexing and led to her interest in developing the skill further.

Currently, Tanvi is engaged in research centring around authorship practices on online writing platforms as part of her PhD. Her research interacts with several fields, including book history, publishing studies, authorship studies, and fandom studies.

She is also the co-founder of Drafted Editorial Services, which offers editing and proofreading services in various disciplines, including the humanities and social sciences, economics, and management. When not working on her research or freelance business, Tanvi loves spending time with her husband and young son, playing with her cat, reading, watching films, and visiting cafés.

Tanvi is currently enrolled in the Berkeley indexing program.

We also chose a six-month trial membership winner: Jules Sherred works as a commercial food photographer and stylist, writer and recipe developer, journalist, and outspoken advocate for disability and trans rights. His website Disabled Kitchen and Garden and his cookbook *CRIP UP THE KITCHEN* (May 2023, TouchWood Editions) were born out of the need to include disabled people in the conversation around food. He also indexed his cookbook. You can visit him online at [julesherred.com](http://julesherred.com)

Other winners from previous years continue their indexing journey—some are working full time and indexing on the side, some are indexing full time, others are mixing indexing and other work.

We will be sending out a call for applications in June for the next bursary, and the winners will be selected in September. We are tweaking our approach slightly based on the experience so far.

### ***Consultations about the Bursary***

TIDE met with Editors Canada and Council of Canadians of African and Caribbean Heritage (CCACH) to inquire about their bursaries/fellowships. Details will be included in our report in the fall.

A curious thing happened with our meeting with CCACH. We realized that nowhere on the ISC/SCI site do we explain what an index is! As this could affect people applying for the bursary, TIDE decided to rectify the situation ASAP. As some TIDE members have backgrounds in media, design, and usability, we were able to create a “What is an Index” video within a few weeks. The video currently lives on the TIDE bursary webpage.

Interest and discussion about equity, diversity, and inclusion are increasing in the publishing industry. TIDE supported a brand-new subgroup to the Indexers Discussion Group (IDG) called Indexers of Diversity.

### ***Indexers of Diversity***

A discussion group for indexers who are Black, Indigenous, and People of Colour to meet and build community around their work in indexing and as indexers. Members of other underrepresented groups are invited to find community here as well. Every member of the larger IDG group is invited and very welcome to join the group, however, please join with the awareness that this group will be a safe and brave space with topics focused on the indexing experiences of BIPOC and other underrepresented communities.

[IndexersOfDiversity+subscribe@idg.groups.io](mailto:IndexersOfDiversity+subscribe@idg.groups.io)

In order to join Indexers of Diversity, you first need to be an IDG subscriber.

## ***Publishing***

See the Publishers Letter on the following page.

## ***Users and Usability***

Now that things are opening up across the country, having some volunteers to research possible tabling events (like Word on the Street, which is presented in various cities across Canada) would be really helpful. If you can give some time, please get in touch!

([siusanmoffat@gmail.com](mailto:siusanmoffat@gmail.com)) For example, Toronto's Word on the Street will be held at Queen's Park May 27–28. And the Lethbridge event will be on September 23.

## ***Technology and Skills***

This group focuses on new technologies and how it impacts indexing. Society of Technical Communications (STC) would be a great sister society to ISC/SCI. 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.

## ***Publishers Letter (Judith Clark)***

### ***Letter Delivery***

On March 11, 2023, 102 letters were mailed to publishers across Canada.

### ***Other Activity***

Barbara Cuerden volunteered to verify all the addresses of existing publishers. This was especially important because the pandemic put some publishers out of business and caused some to relocate. Many updates were needed. Barbara also helped spot publishers to add.

I found additional small publishers of non-fiction / memoir titles (in large part thanks to Barbara's suggestions) and added them to the list for a net gain of around twenty viable publishers.

### ***Other Information***

An increasing number of publishers deliberately omit any physical address from their websites. Some state explicitly that they do not accept physical submissions or contacts of any kind. While this is intended to thwart would-be authors who won't do the required electronic submission, it has the unintended effect of preventing those publishers from getting ISC/SCI letters.

An Ontario regional ISC/SCI representative says the group hopes to meet in person in 2024 and may be able to resume the physical process of getting the letters out (if ISC/SCI continues to send them), that is, stuffing envelopes, addressing and stamping them, and so forth. The group did the first mailing but did not meet in person during the pandemic.

Having put out the Publishers' Letter for three years, I am stepping down after this year's mailing. I am happy to assist someone else in getting up to speed if ISC/SCI continues the project.

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## *Survey Committee Report (Wendy Savage)*

### ***Report on Presentation of Indexing Rates on Websites of Indexing Societies***

At the request of the executive committee, a report on how sister indexing societies address indexing rates on their public-facing pages was compiled in September 2022.

### ***Annual Survey (2022)***

As per procedures, the annual survey was scheduled to be a very short membership survey (two questions). A request was received from the executive committee to include a few questions in this survey about a proposal to set up a lending library for ISC/SCI members, and a further six questions regarding this were easily added.

The survey was sent out to members on October 06, 2022 and ran for thirty days (the total response period for our subscription). We had forty-one responses, which is a 30 percent response rate (for surveys in general this seems to be a good response). On a scale of one to ten, with ten being extremely happy, all responses were six or over, with 93 percent between eight and ten. So I believe that we can be assured that our members are generally satisfied with our Society.

The response to the lending library was perhaps less encouraging, with 50 percent in favour, and 50 percent not interested. However, of those who were interested, there were many comments. The majority were in Ontario and British Columbia.

The Survey Committee has previously recommended that one survey should go out each year in a four-year rotation as follows:

- Brief Survey
- Long Survey
- Very Short Survey
- Rates Survey

And therefore in 2023, we will have a Long Survey. The recommendation of the Survey Committee is that the questions asked in the Long Survey should be reviewed, in order to perhaps place us better in the publishing world.

# Ad Hoc Committee Reports

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## *Community Engaged Research Report (Jolanta Komornicka)*

ISC/SCI partnered this year with The King's University in Edmonton, Alberta, on a research collaboration. Supervised, honours-equivalent psychology students conducted research on mid- and late-life career transitions. The aim of the project from ISC/SCI's perspective is to gain information and materials to help our members as they become indexers. This research project and its scope was developed jointly between the lead researcher at TKU (Elim Ng), the students at TKU, and members of ISC/SCI (Tere Mullin and Jolanta Komornicka).

Students wrote an interim report, summarizing their research findings and including an annotated bibliography, in November. In April, they presented the final findings of their research. Jonathan Leggo and Tanvi Mohile attended in person on behalf of ISC/SCI, while Jolanta Komornicka attended virtually. The session drew a lot of engagement from the audience, with excellent questions being asked. The students have also developed resources for the ISC/SCI website, including myths about career transitions, how to make the most out of mentoring, how to prepare for a career transition, and an updated version of the annotated bibliography from the interim report.

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## *Conference Bursary Committee Report (Jolanta Komornicka)*

In anticipation of the in-person conference at St. John's this June, the executive struck an ad hoc committee in charge of inviting applications for a conference bursary. The committee consisted of Christine Dudgeon, JoAnne Burek, and Jolanta Komornicka. The bursary would pay the two-day early bird conference fee and eligibility followed these criteria:

- Applicant lives at least 1000 km from St. John's.
- Applicant will contribute to the conference by performing just one of these tasks (you choose the task):
  - Write an article about the conference.
  - Generate a list of five questions that can be asked of the general audience at the conference.
  - Help at the registration desk.

The committee gave preference based on whether the applicant had recently (since 2018) completed indexing training and had ever attended an indexing conference.

We had six applicants this year. Therefore, the committee, following the procedures, randomly selected three winners from the pool that had completed indexing training within the last five years and had never attended a conference before. Our winners, in the end, were Wendy Savage, Diana Palardy, and Jessica Humphreys.



We're excited to see them at the conference!

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## *Executive Committee Travel Committee Report (Christine Jacobs)*

### **Grants for 2023**

Number of applicants: 8

Number of applicants to receive grants: 8 (one ultimately unable to attend)

Total monies granted: Budgeted amount (\$5000) was equal to granted amount (\$4999.97). The grant that was not fulfilled was for \$600, so that returns to the budget.

### **Procedures Followed for This Year**

#### ***Questions We Considered and Responded To***

- We were asked about refusing someone if there were more than three applicants. The policy specifically states (p 2) that "reimbursement is not limited to a set number of awardees," so we would **not** refuse someone if there were more than three applicants.
- We were asked about criteria for rejecting applications. Given that this policy is available to all current executive members (and Recording Secretary) and only to those people, we do not see any need for rejection of applicants; hence there is no need for developing criteria for such.

The committee (consisting of Heather Ebbs, Christine Jacobs (chair), and Ruth Pincoe) met twice by Zoom. The first to ensure that the form that applicants had to submit was in line with policy, the second to discuss the applications.

Once the decisions were made, the committee sent each of the applicants a letter of confirmation, copying it to the ISC/SCI Treasurer. See example of letter below. Other discussion was handled via email.

The application process is confidential. Only the committee is aware of who has applied and only the committee and the Treasurer are aware of who has received a grant.

### ***For Future Reference, Policy, and Procedure Clarifications / Suggestions***

- Specify in policy that the grant is open to all current Executive, incoming Executive, and the Recording Secretary.
- "Travel costs" should be clarified. This could be a list of examples along the lines of "including but not limited to ..." and could include transportation to airport, necessary overnight accommodation for travellers from remote areas, baggage fees, etc.



Conference accommodations, accommodations for layovers for personal purposes, and conference registrations are excluded from the bursary.

- It would be helpful for the committee members to receive a list of current and incoming executive members.
- The policy and the deadline, which could be slightly closer to the early bird registration date, should be made well known to current and incoming executive members well ahead of time.
- There is currently no policy about what to do about grants that are not used because the individuals have had to change their plans. Does the money go back into the pot to be redistributed if everyone did not receive the amount requested; could it be used for a late applicant; could it be carried over to the following year? This committee did not address the possibilities and the money is assumed to remain in the pot.