



INDEXING SOCIETY
OF CANADA

SOCIÉTÉ CANADIENNE
D'INDEXATION

Annual Report, 2023–2024

June 22, 2024

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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. ICRIS also has twice-yearly online video meetings.

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; posts on various social media accounts; and posts on our website, where we also maintain a list of resources on indexing and indexes.

Board, 2023–2025

Position	Name	Term 1	Term 2
Co-President	Jolanta Komornicka	2023–2025	
Co-President	Maggie Billard	2023–2025	
Membership	Tanvi Mohile	2023–2025	
Treasurer	JoAnne Burek	2023–2025	
Communications	Céline Parent	2023–2025	
BC Regional Representative	Judith Nylvek	2023–2025	
Prairies and Northern Regional Representative	Jess Herdman	2023–2025	

Central Regional Co-Representative	Ronnie Seagren	2023–2025
Central Regional Co-Representative	Emma Warnken Johnson	2023–2025
Eastern Regional Representative	Wendy Savage	2023–2025
Bulletin Managing Editor	Alexis Anderson	2024–2025
Website Administrator	Christine Dudgeon	2023–2025
Website Developer	JoAnne Burek	2023–2025

Appointed Positions

Position	Name
International Liaison	Alexandra Peace
Recording Secretary	Patti Phillips

Ex Officio Positions

Position	Name
Past-President	Alexandra Peace

Reports from the Executive Committee

Co-Presidents' Annual Report (Jolanta Komornicka and Maggie Billard)

Jolanta Komornicka

Hard to believe it's already been a year! The Society continues to be going strong, despite the slight dip in our membership numbers. Maggie Billard joined me this year as co-president and it's been a great time working with her. She's taken to the job admirably, most notably by keeping me on task while still being conference chair and pulling off a fantastic virtual conference! She also helped me design and organize the Annual Report At-A-Glance sheet (distributed to members two weeks prior to the meeting). We know you all will still read the full report, but we hope that having some of the key take-aways in a quick-reference form will help highlight the fantastic work of this Society and show you why this all-volunteer-run group is worthwhile.

As you'll see from the report, this year has come with some notable highlights. We had a table at Word Vancouver in September 2023, Alexandra Peace and I have been giving presentations on the wonders of indexing and indexers to editors and publishers, and in September we officially incorporated. The discussion for incorporation had been on-again, off-again for several years. Things finally came together this year, however, after more concentrated conversation at the executive level. JoAnne Burek spearheaded this initiative and did all the heavy lifting, for which I remain immensely thankful. Being incorporated means that when we run conferences and table events going forward, the individual organizers have legal protection should anything go awry; before now, individual members could be sued or held otherwise liable for accidents and damage. For more on what incorporation means, see the Incorporation Report in this document and the Incorporation Report Package on the website (in the dashboard with other AGM materials). We will be setting time aside during the meeting to discuss incorporation and the by-laws.

We welcomed several new people to our board this year. Emma Johnson joined Ronnie Seagren as co-rep for the Central (Ontario) Region; Judith Nylvek came on as BC rep; Céline Parent has taken over on communications; Tanvi Mohile is our new membership secretary; Wendy Savage agreed to come on as Eastern rep while still heading the survey committee; and Jess Herdman is our new rep for Prairies and Northern Canada. All have brought their unique energy, perspectives, and fresh ideas to the executive,

making my and Maggie's job that much easier, so a hearty salute to you all and those members of the board who have continued on from previous years: Ronnie Seagren as Central co-rep, Margaret de Boer as ICRIS liaison, JoAnne Burek as treasurer, Vicki Gregory as managing editor of *The Bulletin*, and Christine Dudgeon as web administrator.

Even as we gain new faces, we say good-bye to others. This was Margaret's last year with us. She has had a long tenure. To name only the most recent positions, she's been co-president, past president, and ICRIS liaison, while also working hard with Carlisle Froese to get our Lending Library off the ground. Her erudition and wisdom on the executive will be missed, and I'm sure you'll all join me in wishing her a well-deserved rest after such unflagging devotion to the Society. Alexandra Peace, our current past-president, will be stepping into the role of ICRIS liaison, and I hear is already excited about the chance to hobnob with all the international indexers. We are also saying goodbye this year to Vicki Gregory, who is stepping down as managing editor of the *Bulletin*. Vicki has been an incredible force, always ensuring that our newsletter was a must-read when it came out. I'm sure I'm not the only one with a running file of tips and tricks I've learned from the articles she's solicited and published over the years. Vicki's contributions on the executive, while never the loudest or longest, were always well thought-out and considered. Her perspective and level head will be sorely missed! Filling the role of managing editor will be Alexis Anderson. We're excited to have her joining us and know that even if Vicki can't be replaced, the *Bulletin* remains in more than capable hands.

The Society continues to think about how we can serve you, our members, best. We've set aside money in the budget to get our website translated more fully into French, to better serve all our indexers and clients and be a better reflection of who we want to be as the Indexing Society of Canada/Société canadienne d'indexation. We also have been actively researching meeting facilitation training for all members of the board. We are also looking for ways to get the word out about you, our indexers, to the clients and publishers who need you, whether that's through tabling events at conferences, our annual letter to publishers, or presentations to editors and publishers about what it is indexers do. If you have ideas for how we might continue this work, we'd love to hear from you.

As always, I am in awe of the volunteers who run this Society. There are a lot of you, and you do amazing things! I've touched on the board in this annual letter, but they could never do half of what they do without the help, energy, and enthusiasm of the volunteers who make up our committees. Just glancing through this annual report shows the breadth and depth of what is going on. If you are happy with what someone is doing, please remember you can send them a Magpie Kudos!

Maggie Billard

What a year it has been!

I had big shoes to fill coming into the role of co-president. I wasn't worried, though, because I have always felt supported by the ISC/SCI community. A hearty thank you to Alex, for always being there and being a fantastic mentor, and to Jola, always so supportive, and to the rest of the board for being patient with me as I learn.

This year I was also conference chair for the 2024 conference, which I felt okay doing only because it was a virtual conference. I will say that sometimes my role as conference chair took precedence over my co-presidential duties (especially at the end), but thankfully Jola was always gracious about it. The conference, however, was a great success. I look forward to only attending next year's conference!

We spent the summer last year getting to know all the new members of the executive. As I am new too, we have all been on this crash course in running a society together. It does feel better to go through it with so many others.

Business-wise, we incorporated and have, as a result, reviewed our bylaws. I've learned so much about this whole process. We are also going to be reviewing our finances this summer, which involved me spending much of the fall finding a bookkeeper with space in their calendar.

Project-wise, we continue to run a lending library for the benefit of members. We also piloted a side-by-side indexing project through Zoom. The lending library continues while the side-by-side indexing project was ended, but this won't stop our quest to find services for our members that will enhance your business and your craft. We are always open to suggestions and love to hear from our members, so if you have an idea or feedback, never hesitate to let us know.

I'm looking forward to my next few years serving you as co-president of ISC/SCI.

Membership Report (Tanvi Mohile)

Since the last AGM report, membership numbers have declined to 125 from 131, representing a 4.5% decrease.

This year, membership numbers are 7.4% lower compared to two years ago.

Total Canadian memberships were down by two (-1.9%) as compared to last year. The decrease in Canadian memberships was led by British Columbia, where membership

numbers declined by five. Ontario, New Brunswick, and Quebec saw the next highest decrease in memberships: 4, 4, and 3, respectively. Nova Scotia, however, saw an increase in memberships, with 2 more members joining from the province. Membership from Manitoba also increased by one but remained the same for Alberta, Saskatchewan, and PEI.

The number of international members decreased by four (-14.2%). Our international members are from India, the Netherlands, the United Kingdom, and the United States.

	May 2024	April 2023	April 2022
Totals	125	131	135
Canada	101	103	111
International	24	28	24
Paid Memberships			
Basic Individual	32	36	39
Listed Individual	77	78	74
Student	1	2	2
Institutional	8	7	8
Honorary Memberships			
Emeritus	4	4	4
TIDE Bursary	3	3	3
Basic Trial	0	1	5

This year the Membership Secretary

- Maintained and updated the Membership Secretary Manual
- Maintained and updated the Society's membership lists
- 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
- Acted as committee member for TIDE
-

Treasurer's Report (JoAnne Burek)

Executive Summary

Profit & Loss Statement: In the fiscal year ending March 31, 2024, the Society had an income of \$27,977. Of this, \$17,836 is attributed to operating revenues, \$9,836 is attributed to revenue received in the fiscal year for the 2023 conference (that is, from April to the date of the conference), and \$306 to interest.

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

Total expenses were \$31,756. Of this, \$19,183 was incurred for the 2023 conference expenses, \$12,574 was for operating costs, and \$4,011 was for one-time costs. In the operating costs, \$4747 was for subscriptions to The Indexer and for merchant fees for memberships paid by credit card. Other large items in ongoing operations include executive travel to the conference and the international liaison of \$4,600, the *Bulletin* at \$570, and the website and listserv at \$1,674.

The one-time costs include \$2,474 for the legal fees and services for our incorporation as a registered society. The TIDE project cost of \$1,195 covered the 5th bursary.

We finished the fiscal year with a loss of \$7,790. This is because the 2023 conference registration revenue from March 2023 is not reflected here because it was captured in the previous fiscal year. Without the conference, we had a profit of \$1,557.

Going forward, starting with the 2024 conference, conference revenue and expenses will appear on the balance sheet as deferred revenue and prepaid expenses. Once the

conference has taken place, these amounts will move to the profit and loss statement. This change in process will be reflected in next year's financial statements.

The balance sheet remains strong with \$37,783 in cash and \$14,280 in investments. Including our 2024 prepaid conference expenses, our total assets is \$56,642.

Proposed Budget

This year, the operating part of the budget reflects the return to in person meetings, moving to business-class email services, and more website translations. Our expected profit from ongoing operations is expected to break even at \$61.

Under Extraordinary and Special Projects, we added money for translations of existing web content. As usual, we set aside \$2000 for unknown new projects and other one-off activities that the members may come forward with.

Highlights 2023–2024

First Quarter (April to June 2023): Compilation of 4th quarter and year-end 2023–2024 financial statements as well as finalization of the 2023-2024 budget.

Second Quarter (July to September 2023): Preparation and posting of 2nd quarter financial statements. Assisted with the reporting of the 2023 Conference financials.

Third Quarter (October to December 2023): Preparation and posting of 3rd quarter financial statements.

Fourth Quarter (January to March 2024): Preparation and posting of 4th quarter financial statements and preparation of the budget for 2024-2025.

April 2024: Compilation of 4th quarter and year-end 2023–2024 financial statements and finalization of the 2024–2025 budget.

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

Thank you for your support.

Communications Report (Céline Parent)

2023–2025 Co-Presidents Announcement

- 2023–2025 ISC/SCI Co-Presidents announcement sent to sister organizations (July 7, 2023)

Tamarack Award

- 2023 winner announcement sent to sister organizations and posted on ISC/SCI social media (July 17, 2023)

Ewart-Daveluy Award

- 2023 winner announcement sent to sister organizations and posted on ISC/SCI social media (June 14, 2023)
- Calls for submissions for 2024 sent to sister organizations and posted on ISC/SCI social media (November 6, 2023, January 18, 2024, and February 29, 2024)

Diversity in Canadian Publishing Bursary

- 2023 bursary reminder sent to sister organizations and posted on ISC/SCI social media (September 12, 2023)
- 2023 bursary winners announcement sent to sister organizations and posted on ISC/SCI social media (December 8, 2023)

ISC/SCI website

- New website content and blog posts were promoted on ISC/SCI social media (January 3, 2024)

ISC/SCI Annual Conference 2024

- Calls for proposals sent to sister organizations and posted on ISC/SCI social media (September 25, 2023, and October 31, 2023), Also shared in the ASI *See Also* newsletter.
- Save the Date reminder sent to sister organizations and posted on ISC/SCI social media (February 1, 2024)
- Registration Open Announcement sent to sister organizations and posted on ISC/SCI social media (February 27, 2024)

British Columbia Regional Report (Judith Nylvek)

The BC Region held Zoom meetings on the 4th Wednesday of

- June (1 attendee)

- August (1 attendee)
- October (1 attendee)
- February (1 attendee)
- April (0 attendees)

Current plans are to see if there is interest among BC Indexers on Vancouver Island to have a gathering in person.

Prairie and Northern Regional Report (Jess Herdman)

The prairies region has mostly been active through relatively small group gatherings over Zoom, all of which were organized by poll based on availability. So far, we've held meetups on the following dates:

- August 22, 2023: 5 active members attended. Theme: approaches to holidays.
- October 30, 2023: 4 active members attended. Theme: approaches to scheduling.
- January 15, 2024: 4 active members attended, including one new member. Theme: learning processes.
- April 30, 2024: 2 active members attended. Theme: professional development.

Four new ISC/SCI members joined this year in the prairies region.

Central (Ontario) Regional Report (Ronnie Seagren, Emma Warnken Johnson)

Maggie Billard left to become co-president, and Emma Warnken Johnson joined in June 2023 as co-representative for the region. Our membership list as of April 23, 2024, includes 51 members in Ontario, 2 emeritus members, 3 institutional members, and 7 members outside Canada.

This year we alternated our meetings between the last Tuesday and the last Saturday of the month, most months. All but one of our meetings were over Zoom.

Saturday, July 29: Our first in-person meeting in quite some time. Eight people attended at Maggie's home and brought a delicious spread of food. We ended up meeting for nearly four hours, a wide-ranging discussion that included a review of each session at June's conference and much else. We also brainstormed a couple of good ideas for topics for future meetings.

Tuesday, October 24: Six people attended via Zoom and we had a great discussion about workflow, comparing how we each plan out and create a process for an indexing project. We started at 7pm in the evening and the meeting lasted about 1.5 hours.

Saturday, November 25: Sadly (and very unusually) no one showed up on Zoom for this meeting—we suspect because we were heading into the busy holiday season. Ronnie and Emma used it as an opportunity to plan out our early 2024 meetings and discuss some other Central region business.

Tuesday, January 30: Six people attended via Zoom, and we discussed our plans and goals for the new year, and everyone shared what they were currently working on.

Saturday, February 24: Four people attended via Zoom, and we had a general discussion about our current work, and attendees had the chance to ask for any advice they might need from fellow indexers. We also generated some ideas for future meetings, with the idea that more structured programming might draw more members out to meetings.

Tuesday, March 26: Three people attended via Zoom, and we had a general discussion about our current work, and attendees had the chance to ask for any advice they might need from fellow indexers.

Our next scheduled meeting is Saturday, July 6. We'll hold an in-person post-conference potluck in Toronto, where members get a chance to discuss the sessions at this year's conference and hear about the conference if they were unable to attend.

Due to the decrease in attendance over the last 6 months, Ronnie and Emma are in the process of evaluating the frequency and timing of our meetings. We suspect that Saturdays have become particularly difficult for members to attend, so we will likely be holding more of our Zoom meetings on the weekdays, with Saturdays reserved for in-person meetings. We also will likely hold fewer meetings (though still more than the 4 meetings a year required by ISC/SCI of all its regional reps) with more focused topics of conversation. Stay tuned for more information!

Eastern Regional Report (Wendy Savage)

As Eastern Region Representative, I did the following:

- Checked-in with lapsed members, asking them to rejoin
- Welcomed new members
- Checked with Nova Scotia members after floods there (all were safe!)

- Held video chats

Video chats held:

- August 16, 2023 – 7 indexers attended
- October 18, 2023 – 3 indexers had a lively discussion about bad indexes
- December 2023 – the meeting was cancelled
- January 13, 2024 – 10 members joined
- February 21, 2024 – 1 person joined
- April 17, 2024 – 2 people joined

As Eastern Region Representative, I thank Maggie Billard for standing in for me when I had a serious fall. I also thank the Society for sending me an Anthurium plant, with best wishes to get well. The Anthurium plant is still well and healthy (as I am), and it has a special place in my living room. Many thanks to all!

Bulletin Report (Vicki Gregory)

Since the last AGM we have successfully published three more *Bulletin* issues and received positive feedback. Each issue transitions very well through all the steps in the publishing process.

I'm very grateful to all the team members who make these issues possible and the writers who send in fantastic content. I'm stepping down as managing editor, but I can say for certain that the new ME will be part of an excellent team!

We welcome all suggestions and article ideas for future issues.

Website Administration Report (Christine Dudgeon and JoAnne Burek)

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.

The Website Developer takes care of the background workings of the website, keeping plugins updated, making major changes to the website, and troubleshooting problems with membership listings, payments, email, pages, and any other technical issues.

Website User Experience Updates and Enhancements

In the fall, changes were made to both the public and the members-only sections to improve clarity and accessibility, reduce confusion, make the pages more inviting to engage with, and make it easier for the Web Administrator to find a home for new content.

In the members-only section, these changes included:

- A new members-only menu that only appears when you are logged in.
- A redesigned Member Dashboard page that consists of three sections:
 - A "Featured" section in the top row of four boxes where we can put whatever hot new item we want to draw attention to.
 - A blog section that has two blogs side by side—one for announcements, one for content.
 - The site map of all pages in the members area. This map is automatically updated when we add new pages for members.
- A new page for members labeled "Start Here" under the Services item in the menu. This page is intended to align with the Welcome letter that is sent to new members.

In the public content, the changes included:

- Editing of pages that had a mix of content for the public and for members on the same page. Public pages are now written for the public. Content directed at members has been moved to the member pages. Two examples of topics that needed this treatment are the isc-I listserv and *The Indexer*.
- A distinction was made between Programs and Resources. For example, the ISC/SCI Awards category and some other items that were under Resources (e.g., Mentorship) were gathered under the single menu category "Programs."
- A new page, "Program Overview," was added to give the public an overview of what we offer (e.g., award programs, mentorship, annual conference, etc.).
- The Resources page was rewritten and updated to give an overview of resources that the public may find useful.

The redesign was applied initially to the English view of the website and the French view was applied later. There are now many pages that need to be translated, and many pages in French that need updates.

New "Region" Field in the Membership Record

The Membership Secretary assigns the region to each member. As of June 2023, the region is displayed in the website's Membership Directory. You can use the Search field to get a list of all the members in a particular region.

Author Names Now Assigned to Posts

Up to September, it had been our practice for blog posts was to show only the date, not the author. The rationale was that all content is a group effort. With the advent of AI, however, it became prudent to publish author names. This applies especially to original, informative content, which would be of the most interest to AI.

For posts that are truly group efforts, like announcements, we display the committee name, e.g., "Ewart-Daveluy Awards Committee." For new informative content contributed by individuals, we display the actual author's name. For older content where we don't know who wrote it, and all other posts, we assign the author name "Indexing Society of Canada."

Members who contribute new content will have their name displayed, unless they want to remain anonymous. This opens up an opportunity for members to grow their online presence by having informative, high-quality content published on our website.

Website Hosting Upgrades

Our website hosting plan provides hosting for three websites: indexers.ca, conference.indexers.ca, and a staging site which is use for testing changes. In August 2023 we had outgrown the resources under the current plan. We moved up to the next level (the PRO plan), at an incremental cost of \$10/month.

Email Accounts

Our email accounts with the @indexers.ca domain needed a lot of attention this year.

In August, we discovered that email was consuming 61% of the hosting space allotted in our account. The other 39% was used by our websites. Because of our emailing habits, such as long conversation threads and never deleting anything, the volume would continue to grow without end. To slow the growth, we adopted practices, such as regularly deleting spam and automated notifications, and limiting its use to decision-type emails and communications with the membership and the public.

In February, we looked into a problem that we had been experiencing for several months. We were seeing email messages sent by addresses in the @indexers.ca domain

not getting delivered and executive committee members not receiving emails that are forwarded to their personal email accounts.

We also had two instances of prospective clients trying to access our website but were blocked because their malware software was identifying indexers.ca as “compromised.”

We suspect the cause was a mass volume of identical emails that were sent out unsolicited to the public in June.

After conferring with an expert in email deliverability, we learned that in the last two to three years, companies like Google (Gmail), Microsoft (Outlook and live.com) and others have been tightening up on email filtering. This is in response to the large percentage of email that is junk and spam. This should be a surprise to no one. Think of how frequently it happens that a new contact sends you an email and it goes immediately into your spam folder. Companies like Google and Microsoft continue to add measures and rules that you must follow to verify that you are a reputable sender.

We have started looking into moving away from the free email hosting which we get from our web hosting company—which offers almost no controls—toward a business-class email service that will help us add the features and rules that show we are a credible email sender. Implementing such a service will increase our costs and cause us to change our email-sending practices.

Side-by-side Working Pilot Project

A side-by-side Zoom account was set up at the end of September. We had a five-month pilot project to assess the interest of the membership in co-working online. Unfortunately, the number of participants was not enough to continue with the program.

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 is very open to sharing knowledge on indexing matters from their corner of the world for the benefit of all indexers.

Two online meetings were held this past year in September 2023 and in April 2024. It was a time for society members to share news on the goings on of their societies. It's a

very valuable effort and encourages good connection and collaboration with other societies. These meetings are held at a time 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 communication within ICRIS this past year has been all the important work on the international indexers website, which was first proposed by ANZSI in 2022. At the most recent online meeting, more detailed plans were discussed about the design and language to use on the website. Funding has been obtained and work on this initiative is progressing well.

Of note also is the project being undertaken to index *The Indexer*.

This past September 2023, I attended the SI conference in Leeds as ISC/SCI rep. It was a worthwhile time and a detailed report on the seminars attended is in the Winter 2023 Bulletin. I also spent some time lobbying attendees to come and attend our conference in Toronto next year. There is some serious interest in coming to Toronto in 2025!

The UK indexers (SI) will hold a virtual conference in September 2024 and an in-person conference is planned in China in October 2024. Most recently, the US held their first in-person conference in quite some time on June 5–6.

We have a reciprocal arrangement with ICRIS, where we circulate our Bulletin and other ISC/SCI news to our sister societies, and they in turn share information about society newsletters, webinars, and conferences. As is the custom, members were notified when sister society news was uploaded to our website this past year.

I will miss the warm connections I made with our international society members as my term as ICRIS representative ends this June. I am very pleased to announce that Alexandra Peace will become the new representative for the next three years. She will bring much experience and energy to the role. ISC/SCI will be extremely well-represented!

Past President Report (Alexandra Peace)

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.

Reports from Standing Committees

Archives Committee Report (Christine Jacobs & Alexandra Peace)

No update.

Book and Periodical Council Report (Ronnie Seagren and Jolanta Komornicka)

Things have been quiet on the BPC front, as Ronnie has been too busy to attend many of the meetings and we are still looking for an indexer willing to step into the role of BPC liaison.

The BPC used to sponsor **Freedom to Read Week**. With some reorganization, it will now be sponsored by a partnership between Library and Archives Canada, the Canadian Urban Library Council, the Ontario Library Association, and BPC. They hope for more stability as well as broader reach and deeper impact.

In addition to their member hubs, this year BPC held five learning sessions for members, supported by Ontario Creates:

- Managing team dynamics: in-house, remote and hybrid
- Censorship: current realities and industry action
- The modern AGM: maximizing engagement with minimal resources
- Effective meeting engagement
- Succession planning for small businesses – to be held **May 29** – Contact Ronnie for information.

Jolanta Komornicka attended the learning session on **effective meeting management** for ISC/SCI. The meeting was facilitated by Leslie Giddings, an IAF-certified professional facilitator. The focus of the session was on annual general meetings and provided ideas for pre-meeting, meeting, and post-meeting means of generating member engagement and participation. Many were not applicable to a small organization such as ISC/SCI, but those that seemed worth considering included being clear prior to the meeting about the nature of the format and why attending will be valuable to the individual member (rather than just valuable to the organization), setting aside time during the meeting itself for networking or providing other value-added content to the meeting beyond society business, and adjusting the presentation of the material to be less like a school lesson and more of a conversation.

Leslie would be happy to provide free 30-minute consultations to BPC members if there are specific topics you would like to dive into a bit more. She also provided additional links to explore:

- <https://www.iaf-world.org/site/global-flipchart/20/care-before-content>
- <https://www.sessionlab.com/templates/effective-meeting-agenda/>
- <https://www.sessionlab.com/blog/how-to-run-a-virtual-workshop/>
- <https://www.iaf-world.org/site/home/clients>
- <https://ica-associates.ca/courses/meetings-that-work/>

The **BPC Annual General Meeting and Member Town Hall** will be held on Wednesday, **June 19** from 1 to 3. Anyone who's interested in attending should contact Ronnie, who plans to be there on Zoom. It's a good chance to see who the members are and how we can use our membership to promote indexing.

Ronnie still suggests that the **BPC liaison role** is best filled by someone who's doing more active indexing and more likely to be available for daytime meetings. One exciting possibility is doing a presentation on indexing for member publishers some time in the next year.

Conference 2024 Report (Maggie Billard)

The conference committee convened in September 2023 for the first time with a solid set of ideas. The date and time for the conference was quickly decided, and by October we had a theme, "The Art of Connection." The program coordinator began contacting possible speakers who could potentially speak on ways to connect indexers. We also put out a call for speakers and got many respondents!

The last speaking slot we needed to fill by wintertime was the keynote speaker. One committee member remembered a session she had liked at a previous conference some years ago, and we reached out to him, and he agreed, completing our roster just in time. For our non-indexing speaker, we decided on a desk yoga-type session and that we would do this before lunch on both days to keep people engaged and focused. We have, in the end, 7 speakers plus the desk yoga, which makes for a slightly shorter conference to prevent burnout for attendees. We are looking forward to feedback from attendees on this set-up.

We also decided on a new Virtual Stitching Circle activity, where everyone could do a project based on the ISC/SCI logo, the magpie. We are excited to see what people come up with.

The executive committee voted in November to keep the conference fees at the same level as the 2021 and 2022 virtual conference: \$100 for members for the early bird price.

In the late fall, we began the search for a Zoom coordinator to run the technical aspects of the conference. The chair contacted 4 options and decided ultimately on JST Productions Inc. due to the unavailability or unaffordability of other options. The charge for this is \$6500 + tax, paid in 3 installments.

As of the end of the early bird period on April 30, we had 92 registrants, with only about 10 of those being fully covered (speakers, ICRIS, and presidents). This means that we have covered the costs of at least the Zoom coordinator, although final accounting has not been completed. It is likely that we will come out even or with a slight profit, depending on how many late registrants there are. A final profit and loss will be made for the September 2024 executive meeting as the conference has not happened at the time Annual Meeting reports are due.

Ewart-Daveluy Indexing Award Committee Report (François Trahan)

Presentation of the 2023 Award

The ISC/SCI Ewart-Daveluy Indexing Award was awarded to Enid Zafran in 2023. We were impressed with Enid's index to *Accidental Conflict: America, China, and the Clash of False Narratives*, by Stephen Roach. The book was published in 2022 by Yale University Press.

The committee (Audrey McClellan, chair; François Trahan and Stephen Ullstrom) received several good submissions, but only Enid Zafran's index reached the level of excellence expected for the award. Her index is available on the ISC/SCI's website. There's also a fascinating article about her work on this index in the Summer 2023 edition of the *Bulletin*.

Banquet Tickets for Winners during Covid

The conference in St. John's, Newfoundland, was the first in-person conference since the Covid pandemic and the cancelled conference in 2020. Winners of the award receive banquet tickets along with their certificate, so we're glad that Anna Olivier (one of two joint winners in 2020), as well as Stephen Ullstrom (winner in 2021) were present at the St. John's banquet. The winner for 2023, Enid Zafran, could not attend the conference. (Note the award was not presented in 2022 since none of the submissions reached the level of excellence that merits the award.)

Submissions

Deadline for submissions for the 2024 award was March 15, 2024, for books published in 2022 or 2023. We were pleased with the submissions received. The announcement for the award will be presented toward the end of this year's virtual conference. The runners-up will be notified in mid-May.

Submission Documents

We ask submitters for a Description of Merit so they can indicate special challenges and other background information to the panel. But we found that some indexers wrote descriptions of their indexes without spelling out the challenges and that made it difficult for the committee to gauge the challenges of the project and understand some of the decisions in the index. So we tweaked the request to make it more specific, and we now ask submitters to make a case for why their index deserves the award.

Committee Members

Audrey McClellan, chair; François Trahan, and Stephen Ullstrom.

Lending Library Report (Carlisle Froese)

We have had a few borrows from the lending library over the past few months. Stephen Ullstrom's book and Do Mi Stauber's books are proving quite popular with members, so we are again grateful for their generous donations. This is a good time to reflect upon the fact that the library collection is primarily made up of books donated by members, a reminder of the generosity and love of learning of this group.

The library is going into the next year with three important goals: finding French resources, establishing the beginnings of a digital collection, and providing more information about the collection directly to members. Both of these goals are in the spirit of embodying the commitment to accessibility of ISC/SCI. To achieve the first, we continue to look for a French indexer willing to donate some of their time to consult with us over the best books to invest society resources in and researching on our own time. To achieve the second, Carlisle will be working through our "wish list" of resources and finding an appropriate book to start with, based on previous research done on digital libraries by Jola. Finally, the promotional goal will be met by establishing regularly scheduled email outreach to members highlighting specific resources. We hope that this will make it easier for members to take advantage of this benefit and get to know the collection.

As we come to the end of the year-long pilot program that has been the ISC/SCI Lending library, we are suggesting some committee changes. As the collection, policy, communication, and lending practices have been created, tested and established, it is this committee's belief that the library would continue to be a valuable resource for members but that the commitment of two volunteers is not necessary. We continue to be cognizant of the fact that ISC/SCI is a volunteer-run society and therefore needs to spend volunteer resources carefully. Moving forward, Margaret will be stepping away and Carlisle will be taking possession of the physical collection to take charge of care and lending of the books. This transition will be taking place sometime over the next few months, as scheduling permits.

Mary Newberry Mentorship Program Report (Carlisle Froese)

Overall, it has been a positive year for the Mary Newberry Mentorship Program. We currently have one active mentorship. The webpage was reworked to improve accessibility and understanding. This new direction gives everyone looking to be a part of mentorship a better idea of what getting involved will entail and wider access to other ISC/SCI benefits that can help at different stages of the career of an indexer. The focus this year has been to streamline applications, encourage mentor volunteers and to ensure more efficiency in the use of this resource. This has included planned outreach to bursary winners to ensure use of this perk.

Mentor volunteers have continued to trickle in. My next goal for the mentorship program would be to secure one or two mentors who would be willing to help with embedded indexing as that has been a topic of interest and there are not currently any mentors in that area on the roster. I will continue to work on building the mentor roster through individual outreach. This focus will allow for the Mary Newberry Mentorship Program to continue making a positive difference for members of ISC/SCI.

Member-Initiated Groups Report (Jolanta Komornicka)

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 two MIGs running. The currently active ones are

- Accountability Group, run by Lisa Fedorak
- Index-Manager Study Group, run by Lisa Fedorak

New Indexer Resources Committee Report (JoAnne Burek)

The NIRC was established in 2021 when we saw a recurring need coming from new and aspiring indexers. They were all asking the same 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.

In 2022, the team developed a series of articles on these topics and published them as blog posts on the website.

New Contributions

In 2023, we started working through the collection of *The Indexer* articles published in the e-book *Newcomers: A selection of articles for those new to indexing*. The e-book is no longer available, but all or most of these articles are free to access at the Liverpool University Press website.

Committee member Jannaya Friggstad contributed several blog posts that introduce and summarize these articles and supply links to them. Some of these articles are also of interest to writers and publishers.

In December, we added new pillar content provided to us by the students at The King's University as a Community Engaged Research project. The main content page is called "Indexing as a New Career in Midlife." There are seven articles in this series.

Posts like these are featured in a new section on the home page called "Featured Post." We switch out the featured post with new content as it becomes available. We also recycle older content periodically to be discovered and rediscovered by visitors.

Canada's Professional Society of Indexers Since 1977

The Indexing Society of Canada / Société canadienne d'indexation (ISC/SCI) is Canada's national association of indexers.

We invite you to find an indexer for your project, read our publications, discover our conferences, events, and resources for indexers, find out about membership, and learn about the Society.

Find an indexer

Find an indexer who works in the subject area of your project.

Attend an event

Attend a local meeting of indexers or [attend the annual conference](#).

Find resources

Find information about indexes, indexing practices, and training in indexing.

Become a member

Join the Society and enjoy the benefits of membership.

Featured Post

What practices will help me with good index term selection?

Term selection is a key factor that determines the quality and usability of an index. Good index terms are clear, ...

Upcoming Events

MAY	1:00 pm – 2:00 pm EDT
11	Members National Chat
MAY	1:00 pm – 3:00 pm EDT
25	Executive Meeting
MAY	1:00 pm – 5:00 pm EDT

Content Calendar

Having authoritative content on the website is a fruitful way to draw in new clients and new members and to getting our website to the top of search results pages. However, new content doesn't show up by accident.

As a means to plan and coordinate content development (which includes new articles as well as updates to existing articles), JoAnne developed a 12-month content calendar starting December 2023. The calendar helps us plan ahead to keep the website fresh and relevant. We use it to check that content is current, build authority in topics that the public is interested in, and always have something new on the home page.

Committee Mandate

It's apparent that the committee has moved beyond just providing resources to new and aspiring indexers. We are providing useful content for indexers of any level and to multiple public audiences. Continuing on this path is important because it raises our authority with the public and it supports our vision: "accessible information; informed people."

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

The bursary is provided to aspiring indexers belonging to underrepresented or marginalized groups to ensure everyone has equal opportunity for progress within indexing.

Our 2022 winner, Tanvi Mohile, joined ISC/SCI and has since completed the Berkeley indexing course. She is currently serving as the Society's Membership Secretary and is also a member of the TIDE committee.

In 2023, we chose two bursary winners: Pascale Hutton and Sade Cooke. Here is some information about them.

Pascale Hutton is from Winnipeg, Manitoba. She is of Métis (Charette, Lagimodière, and McDonald families) and French-Canadian ancestry. She identifies as ace or asexual. She is in her last semester of the Master of Library and Information Sciences program at the University of Alberta and is currently working as an archive technician at the Archives of Manitoba. Pascale hopes that through indexing more Indigenous and/or queer readers like herself can see themselves reflected on the page. She is grateful for the opportunity and is currently immersed in the Berkeley course.

Sade Cooke (they/them) is a critical information worker based in Kijipuktuk, Mi'kma'ki. They hold a Master of Library & Information Science and a MA in Gender Studies and have previously worked in public libraries and community archives. Sade is eager to incorporate their passion for anti-oppressive subject analysis into their new career as an indexer. Sade was working full time until this month and will be starting the Berkeley course soon. In the meantime, they have attended at least one Zoom chat, have been reading *The Indexer* and will attend the 2024 conference.

Land Acknowledgement and IDE Statement

TIDE has written up a land acknowledgement for the conference. It focuses on making the acknowledgement personal. This year, TIDE will also be working on creating an IDE statement for the Society.

Publishing

We really appreciate Mercedes Brian sending out the publishers' letters. She sent out 102 letters in March this year.

Users and Usability

Although there are several opportunities to table or present at events, we need a volunteer to coordinate this. If you can give some time to this important work, please email siusanmoffat@gmail.com.

Technology and Skills group

This group focuses on new technologies and how it impacts indexing and indexers. Listserv discussions have increasingly focused on the impacts of AI on 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! Volunteers are needed to coordinate these outreach efforts. If you are interested in this work, please email siusanmoffat@gmail.com.

Tabling Events (Jolanta Komornicka and Brittany Vesterback)

This year, ISC/SCI tabled at two events: the Editors' Canada Conference (June 2023, in Toronto) and Word Vancouver (September 2023, Vancouver).

At Editors' Canada, we gave out

- 13 Do You Create Indexes? cards
- 9 Bookmarks (plus all attendees received one in their swag bag)
- 5 Business cards
- 10 Pens

The table at Editors' Canada was relatively quiet. Editors came up to talk about how much they appreciated indexers existing, and a number of attendees were curious about learning more about indexing as an addition to their current services. The table was a useful way of reminding editors that indexers exist and that there's a dedicated society of professionals engaged in the work.

At Word Vancouver, we gave out

- 16 Do You Create Indexes? cards
- 15 Do You Need an Index? cards
- 17 Bookmarks
- 18 Business cards
- 23 Pens

The table at Word Vancouver (a half-table shared with Editors' Canada) had pretty steady traffic until the last hour or so when everything started to wind down, and there were other people in the publishing industry popping around periodically. The most worthwhile aspect of having a table was talking to the other exhibitors—writing groups in particular seemed likely to talk about indexing to their members. Reaching out to admins for writers groups might not be a bad idea in general.

We talked to a fair number of attendees as well, but that usually involved explaining what indexing is and that yes, it is done by a human being. A couple people got very excited about the idea of indexing as a job when it was explained to them, which was fun to see. There were some interesting conversations that came out of it.

Half-table at Word Vancouver was a fairly low-pressure way of getting ISC/SCI in front of a lot of people who in some cases wouldn't have heard of us.

Publisher's Letters Report (Mercedes Brian)

Letter Delivery:

- 102 letters were mailed on March 18, 2024.

Other information:

- While the letter is well-written, I think it could advocate more forcefully for indexers. I would be happy to provide a draft with a few changes and then edit with someone else who has the skills for this.
- 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. I emailed two publishers without physical addresses asking for the mailing address and didn't receive an answer.
- The process of printing address and return labels and the letter was straight-forward. I convinced a friend to let me use their colour printer as part of my volunteer effort. In future, it may be wiser to print in black. The letter assembling and stuffing took me about an hour. The most onerous thing was driving to Staples and not being able to source the premium paper and envelopes I was hoping to find, so I selected the heaviest and brightest paper they had.
- I received the information for the publishers' letters in good order from Judith Clark, and my expenses for the paper products and stamps was promptly reimbursed. I'm happy to continue volunteering in this capacity.

Survey Committee Report (Wendy Savage)

The Long Version of the Membership survey was reviewed and updated by Alexandra Peace and myself. Comments by Julia White, who has some expertise in surveys, have also been incorporated. Many thanks to both Alex and Julia!

The survey was supposed to be sent out by Easter, but unfortunately, life intervened! Hopefully, the survey will be sent out before the Annual Meeting, so that I can report on it there.

Ad Hoc Committee Reports

Bookkeeper Report (Maggie Billard)

Due to a question around finances brought up in previous executive and AGM meetings, the presidents were tasked with finding an independent bookkeeper to review the books and give advice on how to structure the budget and other financial documents.

Unfortunately, this project has been significantly delayed due to various issues with my own availability and the availability of the bookkeepers I interviewed. I apologize for this.

In the meantime, upon feedback from the membership, the method for reporting our finances has been adjusted. See the Treasurer's Report for further details on that matter.

A review of the books is now scheduled for August 2024.

Incorporation Report (JoAnne Burek)

Please see the Incorporation Report Package (on the website, under the member dashboard) for the full set of incorporation documents, including the by-laws.

Why incorporate?

- Although ISC/SCI has existed as a non-profit society for over 40 years, we had never done the paperwork to become a *registered* non-profit organization. In 2022–2023, there was a growing concern about our lack of official status.
- The problem with not being incorporated is that we are just a collection of individuals. Anything that a member does on behalf of ISC/SCI is construed as that individual acting for themselves. That includes entering into agreements with institutions. Here are two real-life examples:
 - Signing a contract with a hotel for an in-person conference: If something goes wrong, only the person who signs could sue or be sued.
 - Partnering with a university on a usability study: This is something we started pursuing a few years ago. We had to abandon it because the university was not able to work with an organization that wasn't a registered nonprofit.

- When a society is incorporated, the institution makes agreements with the society, not with an individual.
- Another key benefit of incorporation is that it ensures that the society continues even after the current people are gone. This means we have continuity, stability, and structure—three important factors that allow an institution to place their trust in us.

Why did we not incorporate earlier?

- As it's been 40 years since the society formed, we can only guess why we have avoided incorporating. Some possible reasons:
 - At the time we established our bank account, there was no pressing need. However, it seems unlikely we could get away with that today.
 - We may have thought there was a downside with no compensating benefits.
 - Or, we may have been steered away from incorporation by a paragraph in *Bourinot's Rules of Order*. Under 56. Incorporation, "Most organizations that exist for social, scholarly, charitable or similar purposes function adequately under constitutions and by-laws of their own devising. However, an organization that grows to significant size either in terms of membership or territorial extent, or takes on responsibilities for finances, property ownership, public exposure, and so on, may find it necessary or desirable to incorporate." We are at a significant size now.

Where are we now with our incorporation?

- At our AGM in June 2023, we showed a line item in the budget about a possible expense for incorporating our society.
- Soon after the AGM, your president, Jolanta Komornicka, and your treasurer, JoAnne Burek, spoke to Big Charity Group, a law firm that specializes in providing guidance to non-profits. A report was made to the executive committee outlining the consultation and identifying the pros and cons. The executive committee approved the recommendation to proceed with incorporation, based on the rights and protections it gives us.
- We incorporated at the federal level on September 26, 2023 (see Certificate of Incorporation attached). Our task now is to compose and finalize the by-laws so that they can be filed. The plan has been to finalize these by-laws and ratify them at the Annual Meeting.

- There are still some consent forms to file with the government, including one that includes the signature of our “founding member,” Peter Greig.

New obligations

- The rules and obligations that apply to us may be different than what you are used to in your own province. The federal government and the provinces each have their own rules.
- With incorporation at the federal level, we are obligated to add the following new practices:
 - The board must appoint an audit committee composed of directors, who review the statements before they are approved by the board. The financial statements must be signed by one or more directors before they are released to the members.
 - The financial statements must be audited by a public accountant. However, because we are a non-soliciting organization (we don’t take in grants or public donations), and as long as our revenue is under \$1 million, we can dispense with appointing a public accountant to audit our books. To dispense with the accountant, we must pass a resolution unanimously “to dispense with a public accountant for this year’s books.” We must pass this resolution every year. It’s not a one-and-done deal. The motion to dispense with the accountant will be put before the membership at the Annual Meeting in June 2024.
 - We must file a corporate return by September 26 each year. The filing involves sending the financial statements and the list of directors to the government. As we don’t have a secretary, this is a task for the treasurer.

Certificate of Incorporation



Innovation, Science and
Economic Development Canada
Corporations Canada

Innovation, Sciences et
Développement économique Canada
Corporations Canada

Certificate of Incorporation

Canada Not-for-profit Corporations Act

Certificat de constitution

*Loi canadienne sur les organisations à but non
lucratif*

Indexing Society of Canada
Société canadienne d'indexation

Corporate name / Dénomination de l'organisation

1539502-0

Corporation number / Numéro de
l'organisation

I HEREBY CERTIFY that the above-named
corporation, the articles of incorporation of which
are attached, is incorporated under the *Canada
Not-for-profit Corporations Act*.

JE CERTIFIE que l'organisation susmentionnée,
dont les statuts constitutifs sont joints, est
constituée en vertu de la *Loi canadienne sur les
organisations à but non lucratif*.

Hantz Prosper

Director / Directeur

2023-09-26

Date of Incorporation (YYYY-MM-DD)
Date de constitution (AAAA-MM-JJ)

Canada