



# Bulletin

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Société canadienne d'indexation

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## 2011 Tamarack Award/ Prix Tamarack 2011

L'une des tâches agréables du congrès en tant que présidente ou co-présidentes est de nommer la personne récipiendaire du prix Tamarack. Heather Ebbs a reçu cet honneur des mains de Vivien Cartmell et Mary Newberry, au cours du banquet au Water Street Café, le 27 mai 2011. Heather a souvent « dépassé les exigences requises » dans ses fonctions au cours de ses années en tant que membre de la Société. Parmi ses rôles les plus récents, citons celui de présidente (2007–09) et de présidente sortante (2009–11). Pendant ces quatre années de service, elle s'est avérée être une dirigeante et un mentor éclairés, tout en faisant preuve d'humour et de compréhension. Elle restera dans les annales pour avoir fait de l'enquête sur les tarifs et salaires son fer de lance en 2008, pour son travail sur la broche en forme de pie de la Société, et pour avoir créé des grilles de mots croisés pour le *Bulletin!*

*(Continued on/suite page 3)*

*Heather Ebbs receiving the 2011 Tamarack award.*



PHOTOS ANNA OLIVIER

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Audrey McClellan  
Membership Secretary

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Please send submissions to [Editorial Committee](#).

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## Editor, comments from . . .

Given a career trajectory that can only be described as meteoric and my current guru status in the indexing community, I guess it was only a matter of time before I would be asked to be the guest editor of the *Bulletin*.  
Not.

I owe this honour more to Lemony Snicket than to my accomplishments, formidable though they might be. A series of unfortunate events led the ISC/SCI to the situation whereby conference news was not so new. The *Bulletin* issue had to be completed quickly, so Mary Newberry, Gillian Watts, and I stepped in to fill the gap while more permanent arrangements can be made. The executive apologizes for the delay. I thank Mary and Gillian for their prompt responses to my questions and all contributors for their insightful and witty articles, all provided quickly and cheerfully.

I've enjoyed working on this issue. I attended the Vancouver conference and have appreciated the opportunity to revisit the sessions I attended and gain insight from the ones I missed. We hope that other conference participants have fun reminiscing and that those who were unable to attend find these reviews enticing. As a newcomer to the ISC/SCI executive—I'm the representative for the Prairie Provinces and Northern Canada—it's also given me the opportunity to get to know some of the others active in the society. I've been a relatively lurky sort of member since 2004. I guess it's payback time. For those of you who, like me, have held back from volunteering, I have to tell you that ISC/SCI execs are great comrades in arms.

We're working to get the *Bulletin* back on track and trust that through it we will be in regular contact with you over the next year. Look for a continuation of the series on indexing software that began in the previous issue. In the meantime, I hope you had a great summer and wish you all good things in the fall.

Moira Calder

## Tamarack Award/Prix Tamarack (cont'd from/suite de la page 1)

One of the many pleasant conference tasks for the President or Co-Presidents is naming of the recipient of the Tamarack Award. Heather Ebbs received that honour from us, Vivien Cartmell and Mary Newberry, during the banquet at the Water Street Café on May 27, 2011. Heather has often gone above and beyond the call of duty during her years of membership in the Society. Her most recent roles were that of President (2007–09) and of Past President (2009–11). During those four years of service she provided wise leadership and mentorship with humour and understanding. She'll long be remembered for spearheading the Rates and Salaries Survey (2008), for her work on the Society's magpie pin, and for creating crossword puzzles for the *Bulletin*!

Dynamique et animée, Heather est extrêmement productive et semble aisément mener de front plusieurs tâches. Elle nous a éblouis grâce à sa capacité à mener une réunion du bureau de direction à distance, et à en produire le procès-verbal. Sa compétence en rédaction de procès-verbaux est légendaire, et elle en a rédigé de multiples, tant pour les réunions du bureau de direction que pour les assemblées générales annuelles de la SCI/ISC. Elle a également accompli cette tâche pour certaines des réunions du comité international des représentants des sociétés d'indexation. À l'heure actuelle, Heather est rédactrice "en chef" canadienne invitée pour le numéro de décembre 2011 de *The Indexer*; elle gère aussi sa propre compagnie d'indexation, et occupe le poste d'enseignante pour un cours à distance en indexation à l'Université de Californie à Berkeley.

Félicitations et un grand merci, Heather!

Energetic and animated Heather is extremely productive and seems able to multi-task with ease. She amazed us with her ability to conduct a distant meeting of the executive as well as create the minutes for that meeting. Her minute-taking skills are legendary, and she has provided many for the ISC/SCI executive meetings as well as for its annual general meetings. She's also performed this task for some of the meetings of the International Committee of Representatives of Indexing Societies. At this time Heather is the Canadian guest editor for the December 2011 issue of *The Indexer*. She's also running her own indexing business, and she's an instructor for a distance indexing course for the University of California, Berkeley.

Congratulations and thank you, Heather!

(Une description du prix se trouve à la page 18) (For a description of the award, see page 18)

## 2011 Conference Vancouver Indexing in the Age of e-Everything



PHOTO ANNA OLIVIER

*Attendees at the 2011 indexers' conference in Vancouver during a break.*

### **Venturing to Vancouver: Adventures of an Englishwoman Abroad**

*A version of this report was published in the British Society of Indexers' newsletter, Sidelights.*

This year's ISC/SCI was organized jointly with the Editors' Association of Canada at the Harbourfront campus of Simon Fraser University in downtown Vancouver.

After a flight extended by the resurgence of Icelandic ash I, arrived in Vancouver a couple of days before the conference and caught the SkyTrain to the waterfront near SFU, so I was able to orient myself a little before walking the

kilometre or so to the YWCA Hotel. On my way I met Ruth Pincoe—so I knew I was in the right place! Always a comfort.

Ruth had organized a gathering of the international reps the day before the conference; a chance to catch up with Pilar Wyman (rep for ASI of the US) and properly meet Max McMaster and Alan Walker (both from Australia). Being part of the international indexing community is one of the things I most value.

Conference day one dawned grey. Vancouver was on a grey and rainy theme, and I was beginning to feel distinctly unimpressed. However, a lively keynote speech from Do Mi Stauber on the subject of Scanners—no, not the David Cronenberg film, but the personality type—got the conference off to a great start. Scanners are people who enthuse about something for a while and then



move on. We (for I am undoubtedly a scanner) are the people who have unfinished projects littering our houses, who spend a month intensively learning Spanish, then stop and forget most of it before we get a chance to use it.

Next up was Enid Zafran, who gave us her take on "Polishing the Index." Lots of useful tips and reminders to help you edit as you go. One of those sessions you can never have too much of, because even if you don't agree with everything the speaker says, it makes you reflect upon your own practice.

Friday afternoon was another lively session as Kari Kells presented a workshop intriguingly entitled "Indexing as Tapestry Weaving." This interactive session took us through different ways of approaching questions and problems that arise in indexing with the help of a selection of indexes created by a number of the participants. Another opportunity for reflection.

In the evening we had the conference banquet at a restaurant right by Vancouver's famous steam clock. The highlight was the presentation of the Tamarack Award, given by the Society Presidents, which this year went to the wonderful Heather Ebbs.

Saturday morning, and my first workshop was "Preparing the Quote," with Max McMaster. Max took us through the process using an example of a piece of work he had quoted for. Turns out I quote pretty cheap. Next I took advantage of the overlap between the ISC/SCI and EAC sessions to attend one on e-book publishing and what it means for editors. The indexers in the audience made sure that some attention was given to what it will mean for them. The overall impression was that the technology has a way to go; available technology and costs mean that publishers generally use the index from the print version or rely on the search function. Which, as we all know, is no substitute for a proper index.

After a fine lunch and an interesting chat with one of the editors, I skipped off for a walk as the sun had finally made an appearance, going back to say my goodbyes as the ISC/SCI wound down, though the EAC attendees were just getting going.

This was my third ISC/SCI conference and, thanks to the joint staging, my largest. They have all been very different and all thoroughly enjoyable and interesting. This time I gave myself some extra time to explore Vancouver; and it stayed sunny from the end of the conference until I caught my flight to Toronto, so I was able to have some good walks around the city, including the 10 km around the sea

walls. I walked this on Sunday morning during a sponsored walk, and for the first 5 km I walked along with an extended Indo-Canadian family whose children offered to sell me their "slightly used Daddy" for \$5.00. I'm still wondering where best to keep him...

Hilary Faulkner  
Society of Indexers (UK)



## Scanner or Diver? Keynote Address, by Do Mi Stauber

Are you a *scanner*? Or are you a *diver*? In her keynote speech, Do Mi Stauber used these two key questions to challenge us to reflect on our careers as indexers. As a young person Do Mi was frustrated by the career wisdom that directed her to find "the one thing you are meant to do." What Do Mi wanted was not one thing, but many things! She wanted to be a quilter, a singer, a political writer, and even more. What she didn't want was one career that would limit the adventures of her mind.

Her acceptance of self came when she read Barbara Sher's book *Refuse to Choose*.



Do Mi Stauber urged us to reflect on our personal style and how it affects our careers.

PHOTOS THIS PAGE ANNA OLIVIER

This well-known career advisor views people as either *divers* or *scanners*. Divers are people who choose one area of life to master as a career and then spend their entire lives becoming experts in that area. Scanners are people who gain their pleasure from developing interests in many areas. Think of a spectrum, and then ask yourself: Where do I fit?

Do Mi, of course, is a scanner. And so are many indexers. If you think you are a scanner, ask yourself these questions:

- Are you reading about more than three topics?
- Is it hard to choose what to do?
- Do you have friends and family saying, “There she goes again!”?
- Do you have many collections of materials, mainly for unfinished projects?
- Do people ask when you are going to settle down?
- Do friends and family drop hints about a tendency to flakiness or lack of focus?

Scanners often respond with feelings of guilt (“Why don’t I fit in?”) and by trying to conform by forcing themselves to limit their interests. Barbara Sher recommends that scanners enjoy living like a bee—that is, taking from one flower and then moving on to the next, gathering just enough of what is needed. Scanners usually thrive either by finding a “good enough” job that supports their many interests or by finding an “umbrella career” that allows inclusion of many interests. For Do Mi, scanner extraordinaire, indexing is the perfect umbrella career.

New technologies and the vast resources on the Internet are perfect for satisfying the needs of scanners. As indexers, we have plenty of material to read and index, from e-books to websites. We have resources to help with research and fact checking, and we can learn even more through distance education courses. Do Mi now mentors new indexers, easily exchanging drafts and revisions. No longer isolated from other indexers, she uses social media to join in a “breathing, responsive community.”

Do Mi’s enthusiasm for Barbara Sher’s career wisdom spills into her blog. To read more about the impact of Sher’s ideas on Do Mi, go to [www.mywholehouse.com](http://www.mywholehouse.com). Look for “My Search for the One Thing, or How Barbara Sher Changed My Life for the Third Time.” Happy scanning!

Judy Dunlop

## Editing Indexes by Enid Zafran

In years past, a rule of thumb was that 20% to 30% of an indexer’s time per index should be saved for editing, but in today’s fast-paced world, that timeline has shrunk. We need to develop personal rules and methods of indexing that save us time and enhance the quality of the index.

Enid Zafran is particularly qualified to offer tips on editing indexes in a way that improves quality and speeds the process. Enid offers a “boot camp” for indexers, at which she trains indexers (the training is one-on-one and customized) how to write good indexes.

One of Enid’s cardinal rules is “Be suspicious.” Enid subcontracts a lot of her work and therefore must edit and review that work. She has a checklist she goes through before sending any indexes forward to clients.

Enid’s first consideration is “Think big.” What is the point of the book? Does the author have a position or agenda that the indexer should be sure to include? Entries need to respect the views of the author—there need to be main headings or subheadings that do this. Even biographies need to consider this point.

The metatopic is not something that can be banned from the book. Readers will use the metatopic to find subjects, which will vary depending on the nature of the book. Often, chapter topics can be listed under the metatopic main heading, each with a page range and a *See also* to where that chapter



PHOTO ANNA OLIVIER

Enid Zafran gave tips on polishing an index.

topic will be its own main heading—almost like a miniature table of contents. Someone could look at the metatopic in the index and see what the book is about.

Something else Enid likes to see is main headings for major topics that give a page range where the “mother lode” of information can be found; underneath that main heading will be subheadings to break the larger range down. The point of an index is for the user to leave it as fast as they can—by providing a big page range that shows the major area of discussion of a topic, the indexer enables the reader to leave the index quickly.

The next thing Enid looks at is the size of the index. If there was a previous edition, Enid expects her subcontractor to provide an index of about the same size as the last or to give her a good rationale for why it is noticeably bigger or smaller. If there was no previous edition, then for the types of books she typically does, she expects an average of about 6–8 entries per page.

Then Enid does computerized checks to fix mechanical errors. She uses CINDEXTM for spellchecking, a cross-reference check, a check for too many locators and several number checks (e.g., numbers missing, numbers higher than the book’s highest page, “jumbo” ranges such as 23–232 when it should be 230–232). Next, she runs Index/Check (Leverage Technologies) to check for various types of typographic or mechanical errors (capitalization, singular/plural consistency, punctuation, page number errors, etc.).

Having done those steps, Enid does the manual checks for client-specific things, such as style exceptions to how page ranges are handled, how to include self-citing authors and use of en dashes, as well as Enid-specific “rules” (e.g., if using “and” in a subheading, she always puts it at the end for indented indexes and at the beginning for run-in indexes). Finally, Enid prints out the index for a read-through. She looks for typos, inconsistent spellings, bad acronyms, weak main headings and subheadings, contextual subheadings if needed for stand-alone main headings, parallel structure, redundancy, vague entries, suspect entries that do not match up, matching double posts, punctuation and so on. One thing that aids in accuracy of personal names is that Enid teaches her apprentices and subcontractors to copy and paste from the PDF every personal name that they index, because names can have unusual spellings that may easily be mistyped and it is impossible for an index editor to know what is correct and what is not.

As she works, Enid creates a list of any queries for the client, typing directly into CINDEXTM and using {00} to clump them at the top. Before she turns in the index, she pulls these queries out to email to the client or, if there are many, for a separate Word file.

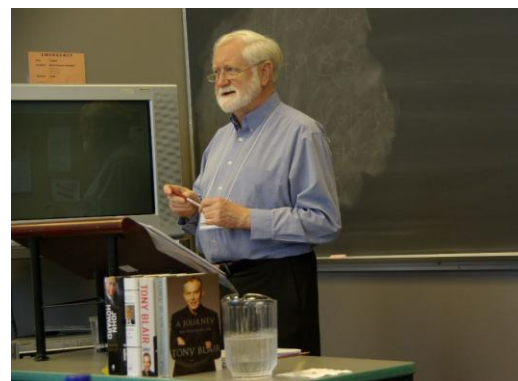
Enid gave many specific examples and tips for every item on her checklist—too many to list in this brief summary. Suffice it to say that her wealth of experience as an indexer and index editor brought a wealth of information to those of us who attended her session.

Heather Ebbs

## Indexing Political Memoirs, by Alan Walker

Alan Walker is an indexer from Australia who indexed the memoirs of that country’s former prime minister John Howard. The experience led him to consider the challenges of indexing memoirs and biographies, which he illustrated using the Howard memoir, *Lazarus Rising: A Personal and Political Autobiography*, George W. Bush’s *Decision Points*, and both the U.K. and U.S. versions of Tony Blair’s *A Journey*.

Leading off with a discussion of Hazel Bell’s comments on indexing biography, Alan delved into both the political and autobiographical nature of political memoirs. He discussed the issue of whether such books should be indexed at all, although omitting an index to avoid the “Washington read” backfired for Sarah Palin and led to spoof indexes popping up on the Internet. He also cautioned about watching out for political language, considering, for instance, the difference between “refugees” and “illegal immigrants,” or “terrorists” versus “freedom fighters.” The principal challenge in these types of books is, of course, dealing with their main subject. Potential sources of bias are plentiful,



Alan Walker discussed indexing biographies.

PHOTO AUDREY MCCLELLAN



stemming not only from the author's own opinions but also from the indexer's. Hazel Bell warns against intruding one's own views by, for example, bending over backwards to maintain political correctness or by allocating less index space to personally disagreeable topics. The professional indexer must be, in effect, like a criminal lawyer who will accept any case, regardless of the client's guilt or innocence. Neutrality is of the essence.

Alan supplied generous handouts that analyzed the four books in question in terms of index structure, coverage, arrangement, subentries, approach to the main character, and much more. In discussing the three forms of indexes—indicative (what the book is about), informative (what the author says), and evaluative—he said that he gave the Howard biography an encyclopedic or indicative index, aiming to make it a useful reference for students and future readers. The Bush index is the informative type and uses a thematic rather than chronological approach. The two versions of Blair's book have completely different indexes, partly because of the differing background knowledge of U.K. and U.S. audiences, but also because of different paper sizes, house styles, and added explanations for the North American market. While the U.K. version has an informative-type index, the U.S. version has proper names only, with massive strings of undifferentiated page numbers; Alan counted 18 that had between 31 and 104 locators. No subject entries, no subheadings, and a very selective list of place names mean that if you'd like to pick up Blair's book, it's best to look for a U.K. version!

Overall, Alan's session was both informative and thought-provoking. His analyses of the four books were revealing, and his comments left attendees with much to think about, especially those who deal with indexing this kind of material.

Gillian Watts

## Preparing the Indexing Quote, by Max McMaster

Max McMaster delivered a very practical, hands-on workshop attended by students, new indexers, and those with years of experience.

Max began the workshop by providing us with a text, heavy on illustrations and diagrams, and then asking us to prepare a quote. There was some discussion among participants as to the best method for



PHOTO ANNA OLIVIER

Max McMaster discussing quote preparation.

establishing a rate for a book with numerous illustrations, but eventually we all got down to work.

Max then tallied the results and divided the quotes into quite a wide-ranged representation of quotes. With this large range in mind, Max then quickly went through each method of calculation—per page, locator, and hour—and illustrated the calculations on the classroom's blackboard. Out of this he came up with a number of conclusions and observations. Here are two:

- Reviewing a sample of the text is essential prior to quoting.
- A shorter index does not mean less expensive, and it might very well be more expensive.

Here is a sampling of the excellent advice and general comments that came out of Max's session.

*Hourly rates and speed.* Max noted that based on published surveys and inflation cost calculations, hourly rates can fall between \$21 for trade books and up to \$68 for journals and periodicals. He advised us that it is important to know or establish your indexing speed when quoting a project using the hourly rate method by indexing sample chapters from the middle of the book. Indexing speeds range from 6 pages per hour for scholarly books to 30 pages per hour for upper elementary school texts.

In Australia there is a recommended hourly rate of \$65 (AUS), which is published on the ANZSI website.

*Per page, per word, per locator.* Sometimes indexers are provided with the word count only, but asked to quote by the page. How, then, does one determine how many words there are per page in order to be able to calculate a per page rate? And then



how to determine which of those pages are actually indexable pages (front and back matter should usually be deducted)?

Per locator rate has the disadvantage of predicting how many locators there will be per page. The density of the text will have to be established as it will have a great effect on the locator rate. And it is critical to agree on what is considered a locator (e.g., is 45–46 one locator?) prior to providing a quote.

*Editing and embedding time.* Once you've established how fast (or slow) you are at the first pass of writing your entries, you must add editing time. The session revealed that this varies considerably, from an additional 10% even up to 50%. When quoting on embedded indexing, it was suggested to add 40% to 50% or even more to the quote.

Max McMaster delivered a workshop that was easy to follow, practical, engaging, and beneficial to experienced indexers as well as to those who were just beginning in the indexing field.

I left the workshop with all the tools required to provide clients with a quote, including the pitfalls of each method. As demonstrated during the tallying of the participant's quotes at the beginning of the workshop, I came to realize that there will always be a range in the various quotes submitted for one particular project, due to all of the various quoting methods. I'm hoping this will mean that I won't worry too much about being "out of the ballpark"—especially now that I have all of the tools and specific information required to provide a more accurate, "in the ballpark" quote.

Thank you to Max McMaster!

*Susan Brown*

## **Indexing as Tapestry Weaving: Patterns Created by Our Decisions, by Kari Kells**

Kari Kells gave a popular workshop at the ISC conference, "Indexing as Tapestry Weaving: Patterns Created by our Decisions." Participants were asked to index the SKILLS Assessment Counselor's Manual before the conference and send their index to Kari. There were fifteen indexes submitted. Copies of the indexes were distributed, along with a workshop outline.

This was not a "how to" class. The idea was to explore our different approaches to indexing this text, in much the same way Kari and Sherry Smith explored their differing approaches in their book, *Inside Indexing*. The idea was to go beyond the basics and explore multiple and creative approaches to the text and get to what's behind the decisions indexers make.

Kari discussed the warp and the weft of indexing and how indexers use those to create the tapestry that is the index. The warp is the indexing principles that we use, and the weft is the concepts in the text. The way we weave those together results in tapestries that are different for each indexer. We spent some time discussing the kinds of indexing problems we had expected to find in the text and what we actually found once we started working on it. Then we organized ourselves into pairs and we moved into the part of the workshop that many of you have probably already heard about, the snowball fight!

We wrote down questions we would have as readers of the text, either as someone who had read the text and wanted to find something again or as someone who hadn't read the text. We also noted terms we might use to look those things up. We were instructed to crumple them up and throw our "snowballs" across the room. When we had a new "snowball," we looked through the submitted indexes to see if those terms were there, or if the info could be found under other terms.

From there we moved into indexing principles, starting with the most important, analysis, which affects most of our other indexing decisions. As indexers we need to decide what is indexable and then how to gather it and to what level of detail. There was a wide variety in phrasing and even locators for each topic in the submitted indexes.



*Kari Kells discussed indexer decision-making.*

PHOTO ANNA OLIVIER

From analysis, we moved on to the “dreaded” metatopic. Indexers are often cautioned not use the metatopic as a main entry, or at least not to put very much under the metatopic. Kari pointed out that readers (even including professional indexers) will often attempt to enter an index using metatopic keywords, so we need to find ways to guide them from there to the concepts they’re looking for. We also talked about gathering and clustering, multiple access points, and phrasing.

Tia Leschke

## Indexing Historical Documents, by Kate Mertes

As someone with doctoral and post-doctoral degrees in medieval history and theology, the author of both *Good Governance and Politic Rule: The English Noble Household, 1250–1550* and chapters in many of ASI’s publications on the indexing of legal, historical, and theological materials, not to mention her reputation as the go-to girl for 16th-, 17th-, and 18th-century pre-modern texts in new editions, Kate Mertes was exceptionally suited to speak on the topic of indexing historical documents.

While all written documents are in a sense historical, Kate’s talk dealt with items prior to the early 20th century. The development of scanning methods has really facilitated the republication of old texts. Given that historical documents are more likely to be consulted than to be read from cover to cover, they have a particularly great need for comprehensive indexes.

There are many facets of indexing historical documents to be kept in mind. Basic information about the period in which a historical text was created is significant for the indexer. One challenge is to mediate between the author’s time and place, and those of the present-day readers. Commonalities across time, place, and culture are difficult and sometimes contradictory, but must be considered. Kate likened the experience to reaching out and holding hands with someone from the past.

Reading the introduction of a new edition of a historical text could shed light on the editor’s particular interpretation, which of course is helpful to know before indexing the material.

Indexers may be working with a translation, which sometimes include terms that are not always accurate, and terms may differ from those used in other translations or other versions of the same text. The indexer must mediate between the language of the author and/or translator and that of the reader.

Other considerations include previous readers of the text, how people expect to receive a text, and various schools of historical thought. For example, when indexing a book about the writings of the influential writer Germaine de Staël, it would be relevant to consider the feminist audience that her present-day readers often include.

The indexer should recognize terms of art, and whether the text refers to the event itself that would have resulted in the creation of that term (in which case the term would not have yet existed). For example, at the time of 9-11, the event was being multiply termed “September 11th, 9-11, Twin Towers, and even “The Event.” Consider what terms a modern audience would look for, and provide suitable cross-references.

Indexers of historical texts must deal with the problems of frequently inconsistent spelling, an issue to deal with through the use of cross-references and/or the use of each spelling with relevant years in parentheses.

Names are so important, and need to be picked up by the indexer for the modern reader. There are many and complex rules and regulations. A classical name might consist of four parts. Modern indexers cannot merely reverse the parts of such a name, thereby forcing it into a modern straitjacket. When in doubt about names, consult the Library of Congress name authorities or even Wikipedia, which can be useful for parts of names. You may also want to check out an upcoming ASI publication on names.



PHOTO TRINE SCHILDAN

“Hands across time” with Kate Mertes.

Yet another consideration in the indexing of historical documents is their intellectual approach. Modern authors usually try to prove a thesis, in which case the reader and indexer work to uncover the author's argument. In ancient texts, there is not necessarily a single thread to follow through the text. There may perhaps be a chain of threads, though not necessarily progressive in nature. In indexing for a modern audience, you may connect things that the audience of the day would not.

Today we have certain expectations about textual division. Pre-modern works do not necessarily follow conventions of dividing work by chapter, for example. This can be partly explained by the fact that classical texts were often read aloud and were listened to more often than they were read. While some pre-modern texts have somewhat clear headings or divisions, many have few or none at all. The indexer must still discern what the author is trying to prove.

The question of what is indexable in historical documents must take into account the uses and needs of the author and the contemporary reader. The indexer reads directly into the past, reaching out across the ages to hold hands with past, in a uniquely challenging process.

Many thanks to Kate Mertes for another inspiring and insightful presentation! Her session was a real conference highlight for me.

*Trine Schioldan*

## Websites, by Gale Rhoades

Gale's session, the first on Saturday morning, fit with the metatopic, or main theme, of the conference: digital publishing. After all, websites are a form of digital publication, a set of pages in electronic form that may have links to other sites. A website is the 21st-century business card.

Gale's first suggestion was to spend some time browsing the Internet, looking at other sites before creating your own. "Look at sites belonging to other indexers and editors," she encouraged, "and also sites unrelated to publishing. Consider good and bad features of each site. What colours are easier to read? Which sites are easiest to navigate?"

In her discussion of creating a site and keeping it active, Gale considered content, start-up costs, ongoing costs, design, and maintenance. "You have to keep updating."

She mentioned that putting your business name on each page and a date last updated on the home page is not a real protection of copyright but will discourage some misuse.

A mission statement for your website is the first item for creation. This should be no more than a few sentences or a bulleted list detailing the focus points for your website. A short summary of your goals is what you want. Then, get down some ideas that match your mission statement. Focus on content to go with the statement, keep flexible, and keep updating. Some people may decide that a blog, where they can write more freely, is a better choice than a website, or some may like to have both.

As she continued to develop the theme of a website as a form of publication, Gale emphasized the importance of fact checking, rewriting, and proofing to avoid errors. She suggested giving your content to somebody else to read and asking what they think of it.

Once you have your content, you must cope with the mandatory costs of registering a domain name and of a hosting service. You don't have to use an email address connected to your site. You want to be able to access your site through any browser, and registering a domain name is only a few dollars a year. Gale suggested talking to technical support for a hosting service to make sure you understand the tools available to you, and avoiding long-term contracts when you start (after one year of success, then you buy a multi-year contract). She also recommended talking to friends and other professionals, and trying out host tools (some hosts offer templates, wizards, tutorials, and technical or design support, with 30- to 90-day trials) before selecting your host. WordPress ([www.wordpress.org](http://www.wordpress.org) and [wordpress.com](http://wordpress.com)) was mentioned as a simple, easy-to-use starting point.

Gale's final point was to make sure your site supports multiple browsers (e.g., Microsoft Explorer, Mozilla Firefox, Google Chrome, and Apple Safari) because coding which works with one may not work with others.

To obtain the PowerPoint of Gale's talk, go to [http://dl.dropbox.com/u/20921796/Freelancers\\_and\\_Websites.ppt](http://dl.dropbox.com/u/20921796/Freelancers_and_Websites.ppt). For a free viewer, either download from microsoft.com or go to <http://dl.dropbox.com/u/20921796/PowerPoint.Viewer.exe>.

*Christopher Blackburn*

[Reports on Frances Lennie's "The Visual Appeal of Indexes—An Exploration" and Ronnie Seagram's "Indexing, Metadata, and Search" will appear in the next issue—Ed.]

## ***Hansard*/Indexers: Hot Coffee, Cool Conversation\***

The Canadian *Hansard* indexers met informally in Vancouver on Saturday, May 28. The various *Hansards* operate quite differently from one another, but the indexers found many common issues, such as print versus web publishing, work flows, and the range of skills needed by the indexers, including layout and web-related skills.

In *Newfoundland and Labrador* indexing occupies 98% of Trine Schioldan's work time. She indexes House proceedings, current and historical back to 1932–33, but not legislative committees because of budget constraints. Trine is a librarian by training, and she works for the Legislature Library rather than *Hansard*.

*British Columbia* was represented by Julie McClung, Robin Rohrmoser, and Shannon Ash. They index House proceedings and committees, including business indexing (House business) and subject indexing, in addition to creating question period subject headings. The indexing unit uploads to the Internet and maintains the online indexes. The *Hansard* technical operations unit assists in print publication process.

In *Prince Edward Island*, represented by Jeff Bursey, *Hansard* indexes daily House debates, committee meetings (since 2007), and the Clerk's journals. Jeff has documented positive feedback to the committee indexes. He also discussed technical issues related to print publications.

In *Alberta* in recent years the role of policy field committees has been expanded to include ministry estimates (budget) debates. While the House is sitting, print transcripts are usually available the following day for indexing, and the indexer posts weekly interim subject and speaker indexes during session. The amazing Deirdre Grist, who was the indexer for more than 30 years, retired late in 2010. Moira Calder attended the coffee session. Also present at the Vancouver conference but unable to attend this meeting was Judy

Dunlop. The *Hansard* office is in the process of revising its work flow.

Vivien Cartmell of Saskatchewan also was unable to attend this meeting but notes that in a part-time position she creates two indexes concurrently, House proceedings and committee discussions. At the end of the Legislature, all indexes are merged into a single index, which can run to more than 33,000 entries. Uploading to the Saskatchewan Legislative Assembly website has been erratic pending upcoming revamping of the site. Since Vancouver, Vivien has semi-retired—"What joy," in her words—and we wish her all good things in the coming years.

Given budget restraints related to out-of-province travel, we felt that it would be difficult to predict how many *Hansardians* would be at any given meeting, so it would not be worthwhile to create formal conference sessions. However, I believe I speak for all indexers present when I say that to a person we found this session interesting, stimulating, thought-provoking, and too brief. In follow-up emails, we decided to continue these informal meetings at indexing conferences.

Moira Calder

(\*Credit: "Hot Coffee," lyrics Lorraine Feather; music, Larry Steelman)



Coffee and *Hansard* talk. From left to right: Shannon Ash, Julie McClung, Trine Schioldan, Moira Calder, and Robin Rohrmoser.

## **Setting Standards for the Future**

In response to growth in the e-book market, the American Society for Indexing has created the ASI Digital Trends Task Force (DTTF). Its aim is the development of international standards for the indexing of e-publications. Collection and synthesis of information on the current state of the e-pub has begun. The task force needs volunteers, and interested indexers are invited to join the LinkedIn group: All are welcome!

<http://www.linkedin.com/groups/ASI-Digital-Trends-Task-Force-4005509>



## International Liaison Report 2010

This report covers my activities as International Liaison for ISC/SCI as the ISC/SCI representative at conferences of Indexing Societies outside Canada and my role as Coordinator of ICRIS (International Committee of Representatives of Indexing Societies). At times my work as International Coordinator seems to overshadow my ISC responsibilities. It can be difficult to coordinate a group whose membership is constantly shifting and whose communication is mainly through a listserv and emails.

In the past attendance at the informal meetings held at the various conferences has been somewhat erratic, but developments over the past two years have been particularly positive. When I was first appointed as Coordinator in 2006, meetings held by international representatives at conferences were irregular and sometimes unfocused. Moreover, the *Indexer* Board Meetings held at SI conferences, while completely separate, involved many of the same people. I had always felt this situation was a waste of the considerable travel expenditure on the part of both the Societies and the individual representatives, and that we should be getting more “bang for our buck.” My experience on executives of both ISC/SCI and EAC/ACR had taught me the value of face-to-face meetings, in which discussion can progress productively and creatively, and participants leave with new views, ideas, and enthusiasm.

With this in mind, I set out to encourage each Society to set a specific time for an international meeting, just before the conference opening. These meetings provided a valuable opportunity for the representatives not only to review possible revisions to the International Agreement but also to discuss current issues, exchange news, and develop new initiatives. For the first few years such organization was uphill work, but the decision to combine the *Indexer* and ICRIS meetings made a considerable difference, particularly as *The Indexer* began to increase its international focus. Today ICRIS meetings are included in conference schedules and dates are set well in advance. While the meetings are still informal, in that they have no power to take binding decisions, the content discussed constitutes important preparation for the upcoming International Triennial in 2012. Representatives plan their travel arrangements to accommodate ICRIS meetings; minutes are taken, and individuals take on specific tasks from one

meeting to the next. There are even suggestions that ICRIS should meet on an official basis more frequently than every three years. I am grateful for the support I have received from Maureen MacGlashan, the editor of *The Indexer*, who shares my international outlook and has provided much helpful advice.

I am proud of the role that ISC/SCI has played in this development by making it possible for me to attend many Society conferences so that I can chair ICRIS meetings and make important contacts with indexers and indexing Societies around the world. I am particularly grateful to Heather Ebbs, who has taken on some of the tasks that fall to the International Liaison, and has also played an important role in drafting Agreement revisions and taking minutes at ICRIS. Noeline Bridge has also helped to maintain contact, particularly with ANZSI, and attended the ICRIS meeting at the 2010 SI conference in Middelburg. And finally, my thanks to the ISC/SCI executive and members that I represent abroad. It is this strength behind me that has made all my international work possible. Here are a few details about the two Indexing Society conferences I attended through 2010. (Please note that my comments on these conferences are confined to the international aspects of the gathering; conference presentations are widely available online, and many also appear as articles in *The Indexer*.)

**American Society for Indexing conference, Minneapolis, Minnesota, May 13–15, 2010.** The International representatives at the ASI conference consisted of me (ISC/SCI), Maureen MacGlashan (representing both SI and *The Indexer*), and Max McMaster (from ANZSI). Our meeting was coordinated by Bonnie Hanks (filling in as ASI International Representative because Pilar Wyman was unable to attend). We were all pleased by the warm welcome we received. Our presence was announced at the Welcome Reception, and we were given the chance to present news from our Societies. Maureen and I were also invited to attend the ASI Board Meeting to speak about *The Indexer* and about international activity and concerns. The ICRIS meeting was somewhat limited because of Pilar’s absence, but we covered a number of key issues. During the conference there were many expressions of interest in the international dimension, and particularly the

upcoming SI conference at Middelburg (Netherlands). The keynote speaker, Katherine Barber, repeated her “magpie” talk and provided a perfect opportunity to sell our ISC/SCI magpie pins!

**Society of Indexers conference, Roosevelt Academy, University College, Middelburg, the Netherlands, September 29–October 1, 2010.** SI's Middelburg conference (hosted by the Netherlands Indexing Network) was truly an international event. At the ICRIS meeting, held on the afternoon just before the conference began, we had representatives from five Societies (Britain, Canada, the United States, South Africa, and Australia / New Zealand) and both European indexing networks (Germany and Holland). At the conference there were also attendees from France and Italy. The ICRIS meeting was particularly valuable because of this wide representation. Conference presenters also reflected an international range, including SI President

John Sutherland (who spoke on “The Invisible Indexer”), Michaël Steehouder (from the University Twente in Holland, who discussed research on how people search for information), Eric Sieverts (from the University Library in Utrecht, who gave a presentation on search engines and language technology), and Rudy Hirschmann (who is associated with the Einstein Papers Project in the U.S.). Pierke Bosschieter gave a workshop for Dutch editors on how to handle an indexer. Evert Jagerman and Jacqueline Pitchford presented a session on taxonomy development for indexers: methods, software, and skills. Caroline Diepeveen and Joed Elich from Brill Publishing presented a fascinating session on indexing modern Islamic materials. The SI conference always includes an international session, during which representatives from the various societies speak on a particular theme. This year is was marketing of indexing to authors and academics.

*Ruth Pincoe*

## Upcoming Conferences

The American Society for Indexing 2012 conference will be held April 19–21 at the Bahia Resort in San Diego, California. The deadline for the call for presentations has past, but the call for posters has a deadline of March 16, 2012. For information, check the ASI website ([www.asindexing.org](http://www.asindexing.org)).

The ISC/SCI conference will be back in the east next year, in Ottawa. The date has not been finalized, so check the website for updates. The conference will immediately precede that of the Editors' Association of

Canada rather than being held jointly. The theme for the EAC/ACR 2012 conference is Editors Gone Wild!

On July 11 to 13, 2012, the Society of Indexers (U.K.) will meet at Brighton. The theme is: “An Indexing Olympiad: International Perspectives” (<http://www.indexers.org.uk>).

The Australian and New Zealand Society of Indexers will meet March 13-15, 2013, in Wellington, New Zealand. The theme is Intrepid Indexing: Indexing without Boundaries (<http://www.anzsi.org>).



PHOTOS ANNA OLIVIER

Conference banquet, 2011, [Water Street Café](#), a little crowded but full of lively conversations!

## Treasurer's Report to AGM, May 27, 2011

I am pleased to present the year-end financial statement for 2010. We have an unusually large surplus this year, although it should be noted that part of this was due to shifting some expenditures to 2011. We had budgeted for a small surplus of \$925 but ended with one of \$2,850. Some of this was because of the strong Canadian dollar, resulting in savings on *The Indexer*. In addition, executive expenses were lower than expected, thanks to using Skype and conference calling for two out of four meetings. This also helped us to include distant members in face-to-face meetings. The fact that there was no triennial meeting in 2010 also meant that the costs for the International Liaison were less than in previous years.

On the revenue generation side, the conference in Montreal, although successful in every other way, was not as heavily attended as some, resulting in a net loss of just under \$1,500. The magpie pins were a big hit with indexers around the world; as of December 2010 we had yet to recoup our expenses but have every expectation of doing so in 2011 (sales and costs are included in the "miscellaneous" sections of the financial statement).

Our reserves remain healthy, with \$15,000 invested in short-term GICs, which earned \$400 in interest. The current bank account remains healthy at about \$8,000. Nevertheless, we have budgeted for a close to break-even surplus of about \$500 in 2011, with the expectation that extra projects will be paid for out of reserves.

Gillian Watts  
Treasurer

## BALANCE SHEET (as of December 31, 2010)

<b>Assets</b>	
Chequing account	\$ 7,860.37
Undeposited funds	2,205.00
GICs	15,000.00
Total	25,065.37
<b>Liabilities</b>	
	0.00

## ISC/SCI Year-End Financial Statement, 2010

### Budget Actuals

Income		
Membership dues	\$12,000	\$12,715
Conference	6,000	2,960
<i>Register of Indexers Available</i>	2,000	2,080
Publications revenue	—	—
Interest income	150	399
Miscellaneous income	50	375
<b>Total</b>	<b>20,200</b>	<b>18,529</b>

### Expenses

Membership (including directory)	450	268
Conference	6,000	4,447
Executive expenses:		
Meeting costs & telephone	200	62
Executive travel	1,500	399
International Liaison travel	1,500	850
<i>Bulletin</i>	1,850	1,549
<i>Register of Indexers Available</i>	850	835

**ISC/SCI Year-End Financial Statement, 2010 (Continued from previous page)**

<i>(Expenses)</i>	<i>(Budget)</i>	<i>(Actuals)</i>
<i>The Indexer</i>	\$ 5,000	\$ 4,831
Internet expenses	500	534
Operating expenses:		
Office supplies	50	—
P.O. box rental	175	178
Postage & delivery	100	351
Bank charges	250	235
Regional groups	400	412
Volunteers, honours & awards	100	—
Outside services	300	173
Miscellaneous	50	555
<b>Total</b>	<b>19,275</b>	<b>15,679</b>
 <b>Income Less Expenses</b>	 <b>925</b>	 <b>2,850</b>

**ISC/SCI Budget, 2011**

Income	
Membership dues	\$12,000
Conference	6,000
<i>Register of Indexers Available</i>	2,000
Interest income	350
Miscellaneous income	100
Total	20,450

**Expenses**

Membership (including directory)	500
Conference	6,000
Executive expenses:	
Meeting costs & telephone	250
Executive travel	1,500
International Liaison travel	2,000
<i>Bulletin</i>	1,850
<i>Register of Indexers Available</i>	250
<i>The Indexer</i>	5,000
Internet expenses	500
Operating expenses:	
Office supplies	50
P.O. box rental	180
Postage & delivery	300
Bank charges	250
Regional groups	400
Volunteers, honours & awards	200
Outside services	500
Miscellaneous	250
<b>Total</b>	<b>19,980</b>
 Income Less Expenses	 470

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# ISC/SCI Membership Report, August 2011

As of August 30, 2011, we have 120 members. Eleven individuals did not renew their memberships, which expired June 30. Four new members joined. The geographical breakdown of the membership is as follows:

## Within Canada

British Columbia	37
Alberta	5
Saskatchewan	2
Manitoba	1
Ontario	50
Quebec	11
New Brunswick	2
Newfoundland & Labrador	1
Nova Scotia	4

## Outside Canada

United States	6
Italy	1

## Membership Types

Individual	105
Student	7
Institutional	8

Institutional members are distributed as follows:

British Columbia	2	Quebec	1	United States	1
Ontario	3	Italy	1		

The following members have joined since the annual report:

Rebekka Augustine	West Kelowna BC	<a href="mailto:rebekka.augustine@gmail.com">rebekka.augustine@gmail.com</a>
Stéphanie Bilodeau	Gatineau QC	<a href="mailto:Stephanie.Bilodeau@gmail.com">Stephanie.Bilodeau@gmail.com</a>
Maurice Guibord	Vancouver BC	<a href="mailto:mguibord@shaw.ca">mguibord@shaw.ca</a>
Blake Heathcote	Toronto ON	<a href="mailto:blake.heathcote@gmail.com">blake.heathcote@gmail.com</a>

The following members have new email addresses:

Kate Adair	<a href="mailto:adairkate@gmail.com">adairkate@gmail.com</a>
Nancy K. Humphreys	<a href="mailto:nancy@wordmapsindexing.com">nancy@wordmapsindexing.com</a>

Please note the following changes of address in your 2010–11 Membership Directory:

Edna Barker  
72 Wood Street East  
Hamilton ON L8L 3Y4  
[readerzoe@bell.net](mailto:readerzoe@bell.net)

Daphne Sams  
204-8591 Westminster Hwy  
Richmond BC V6X 3E2  
[daphnesams@gmail.com](mailto:daphnesams@gmail.com)

Merridy Cox Bradley  
102-35 Boardwalk Drive  
Toronto ON M4L 3Y8  
[merridy@sympatico.ca](mailto:merridy@sympatico.ca)

Sheena So  
234 Rideau Street, Ste. 1602  
Ottawa ON K1N 0A9  
[indx@bell.net](mailto:indx@bell.net)

Gaile Brazys  
1402 Vancouver Street  
Nelson BC V1L 1E4  
[gbrazys1@telus.net](mailto:gbrazys1@telus.net)

*Audrey McClellan, Membership Secretary*

## ISC Tamarack Award / Prix Tamarack de la SCI



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. It is awarded annually and is the subjective decision of the President or Co-Presidents. It is called the Tamarack because the physical acknowledgement of the award is a small version of a tamarack-twig decoy created by the Cree people of the James Bay area.

Le prix Tamarack a été institué en 2004 par Ruth Pincoe, alors présidente, pour reconnaître le travail de membres dont le bénévolat pour la Société a « dépassé les exigences requises ». Il est remis annuellement à une personne nommée à la discrétion de la présidente ou des co-présidentes. Il porte le nom de tamarack en référence au leurre en tige de tamarac (épinette ou mélèze) créé par le peuple Cri de la région de la Baie James, et dont les récipiendaires reçoivent un modèle réduit.



ISC/SCI Photographer Anna Olivier