

Policy on Mentoring

This policy should be read in conjunction with the Mentoring Procedures

Background

The Australian and New Zealand Society of Indexers provides a mentoring scheme for novice indexers. In the absence of formal courses leading to tertiary qualifications, the mentoring scheme provides a more advanced level of training, building on the basic workshops offered by the Society. The mentoring scheme performs a number of functions:

- a. It provides novice indexers (mentees) with professional guidance and advice by qualified, experienced indexers (mentors) on a one-to-one basis
- b. It provides indexes to significant published works which lack indexes
- c. It makes indexes accessible in appropriate formats.

The Scheme

1. The Australian and New Zealand Society of Indexers offers novice indexers a mentoring scheme.
2. The scheme is a Society-wide initiative which draws its mentors from any of its Branches or individual members.
3. The mentoring scheme is administered by a Mentoring Coordinator, under the auspices of the Education Committee.
4. The scheme is dependent on the availability of appropriate mentors.
5. Participation by mentors and mentees is voluntary, although fees will be collected to compensate the mentors for their time.
6. There are specific requirements for the mentors and mentees.
7. Mentees are expected to produce indexes of acceptable basic quality, equivalent to commercial quality in all aspects except for utilising a longer time frame.
8. Works to be indexed must meet the criteria of the mentoring scheme.
9. Indexes produced will be made available in an appropriate format, for example:
 - By mounting the index on the Society's website
 - By providing the index to the library owning the publication
 - By publishing in the ANZSI Index Series, or
 - By publishing the index as a CD-ROM or in other electronic formats.
10. While the index remains the intellectual property of the mentee, ANZSI retains the copyright for the index and is entitled to any proceeds from the sale of an index.
11. There are no limits on the number of times an individual can be mentored; however each mentoring item will incur a new mentoring fee.

The Mentee

12. An applicant for admission to the mentoring scheme must meet the following criteria:
 - a. An applicant (mentee) must be a current financial member of ANZSI and must not be a Registered Indexer
 - b. Applicants should have completed a recognised indexing course (including both theoretical and practical aspects) or have indexing experience. Where required, the Education Committee will determine the suitability of the applicant's experience. Determinations of the Education Committee will be final.

- c. Applicants are expected to have read, or at least be very familiar with one of the recognised indexing texts

The Mentor

13. A mentor of a book index must be a Registered Indexer. In cases where the skills of database indexing would be useful (for example in mentoring a journal compilation), an experienced database indexer may be a mentor.

Mentors undertake the following duties:

- a. discuss the indexing proposal with the mentee and ensure that the work chosen is appropriate
- b. schedule a series of contacts (usually 5-6) over a period of up to six months. Contacts can be by email, mail, fax, phone, face-to-face or a combination of these
- c. monitor the structure and consistency of the index but not become involved with the intellectual content or do any indexing
- d. advise on particular problems, e.g. forms of names
- e. give the mentee feedback at an early stage and as soon as practicable after each contact
- f. provide brief written reports to the Mentoring Coordinator on the progress of the mentee at least three times: after the initial early feedback; approximately halfway through the mentoring; and when signing off the completed index
- g. sign off the completed index as being up to an acceptable standard, based on the criteria outlined in the procedural guidelines for mentors
- h. if an index does not attain an acceptable standard within a reasonable time frame, it is the responsibility of the mentor to inform the mentee and write to the Mentoring Coordinator, giving reasons. The Society reserves the right to then terminate the menteeship.
- i. if an index does attain an acceptable standard, the mentor is responsible for sending the completed index to the Mentoring Coordinator so that it can be made available in the most appropriate format.

The Mentoring Coordinator

14. The administration of the Mentoring Scheme is undertaken by the Mentoring Coordinator who reports to the Education Committee of the ANZSI Council. Duties of the Mentoring Coordinator are:

- a. provide the list of prospective titles created by the Education Committee to the mentee, in order for the mentee to choose a work for indexing
- b. receive completed mentee applications and application fees, and forward components of the applications to the necessary parties, as per the *Mentoring Procedures*
- c. verify that the mentee meets eligibility requirements
- d. recruit potential mentors (see sample letter of recruitment) and keep a register of available mentors
- e. link approved mentees with appropriate mentors
- f. receive feedback from the mentor on the progress of the mentee
- g. receive the completed index that the mentor has signed off as being up to an acceptable standard
- h. liaise between mentor, mentee and the Education Committee, particularly in cases requiring conflict resolution

- i. under the guidance of the Education Committee, make the index accessible in the most appropriate format
- j. identify libraries that hold copies of the work and notify them of the existence of an index
- k. organise payment of the mentor
- l. solicit feedback from the mentees on their experience with the program.
- m. maintain the Society's list of prospective titles for the mentoring scheme (ie remove works which have been indexed by mentees, add new works as indicated by the Education Committee).

Education Committee

15. Details of the composition and duties of the ANZSI Education Committee under which the Mentoring Scheme will operate are provided in the *Committee Guidelines*.

Procedures for the Mentoring Scheme

16. Details of the mentoring process are provided in the *Mentoring Procedures*.

To accompany this policy:

- Mentoring procedures

Mentoring Procedures

These procedures should be read in conjunction with the Policy on Mentoring

Timing

1. The mentoring scheme has some time-related aspects:
 - a. Indexing should be completed within six months, but this can be extended to twelve months with the approval of the mentor.
 - b. Mentees should keep a record of the time they spend on the index for their own benefit. This will be useful data for the mentee, and for the Mentoring Coordinator for assisting others.
 - c. Mentors should also keep a record of their time and include this in their progress reports to the Mentoring Coordinator. This will give an indication of how arduous the task is.

Choosing a Work for Indexing

2. The criteria for indexing an item under the mentoring scheme are:
 - a. Works chosen for indexing can be in any format, including published works, manuscripts or electronic materials.
 - b. Works should ideally be a minimum of 150 indexable pages and be able to produce an index of at least 600 entries.
 - c. Works chosen should not have an existing index.
 - d. Works should be readily available for both mentor and mentee.
 - e. Works should be of interest to a specific audience or suggested by information specialists (eg librarians, editors, etc)
 - f. Works chosen for indexing should have a strong subject component, or provide a means of developing skill in a particular genre of indexing (eg biographies, genealogical or social history works which have strong name components)
 - g. Works chosen for indexing can be cumulative works, eg complete or partial serial runs, provided they cover a minimum of 5 continuous years.
 - h. Suitable works for indexing can often be found in local historical societies, higher education institutions, libraries etc.
 - i. Works for inclusion on the Society's list can be suggested by interested organisations from their collections, by Branches, or by experienced indexers. These items will be approved by the Education Committee and collated and distributed by the Mentoring Coordinator.
 - j. Works chosen by mentees must be approved for suitability by their mentor.

Making an Application

3. Applicants for the Mentoring Scheme are required to:
 - b. choose a suitable item from the list provided or a work they have found themselves which meets the provisions of the Mentoring Scheme
 - c. complete and submit the approved application form (current form is appended)
 - d. ensure that the mentor has access to the content of the work to be indexed

- e. submit an application fee of A\$250.00 per mentoring item. Once a proposal is accepted into the mentoring scheme, this fee is non-refundable. Please note that all other associated expenses are the responsibility of the mentee.
4. Applications should be mailed to the Mentoring Coordinator at the Society's postal address.

Receipt and Processing

5. Upon receipt of application, the Mentoring Coordinator will:
 - a. check the application to verify that it meets all requirements
 - b. match the mentee with an appropriate mentor (either for geographic proximity or subject expertise)
 - c. expedite the initial contact and ensure that mentor and mentee have full contact details for each other (address, phone, fax, email etc)
 - d. forward the payment to the ANZSI Treasurer to record and receipt
 - e. forward a copy of the application to the mentor.

The Mentoring Agreement

6. Mentoring is a personal process and all participants will approach it differently. It is the responsibility of the mentor/mentee team to work together and decide how they will work together.
7. A 'Mentoring Agreement' is to be drawn up by the mentee which states the basic arrangements made by the two parties. This agreement should be revisited and if necessary revised periodically during the mentoring.
8. The Mentoring Agreement should be attached to the mentor's final report.

The Finished Product

9. At the completion of the mentoring, the mentee will provide the mentor with an index in a format agreed to by both parties (ie print, electronic etc)
10. The mentor will check the index for accuracy, style, comprehensiveness and arrangement, using whatever standards had been agreed to by the parties as appropriate to the project (eg ISO standard, Style Manual, Chicago Manual of Style etc)
11. Once the index is deemed acceptable, the mentor will 'sign off' the item and forward the index and a short report to the Mentoring Coordinator.
12. The Mentoring Coordinator will advise the Education Committee when a project has been successfully completed. The Coordinator (if necessary in conjunction with the mentor and/or the Education Committee) will suggest to the Education Committee an appropriate format for distribution. This will most often take the form of mounting the index on the Society's website, but might also include publishing an index as part of the ANZSI Index Series, lodgement of a manuscript copy with the owners of the original work, etc.
13. Once the distribution method is approved by the Education Committee, the Mentoring Coordinator will notify the successful mentee via a letter of congratulations, which will include details of how the index will be distributed (sample appended). This letter will be sent within three months of the forwarding of the mentor's final report to the Mentoring Coordinator.
14. In cases where the work indexed is not a unique manuscript copy, the Mentoring Coordinator will identify libraries that hold copies of the work and notify them of the existence of an index.

15. In cases where indexes are print published, the Mentoring Coordinator is responsible for distributing print copies in the following manner: two copies to the mentee, one copy to the ANZSI archives, and the number of state and national legal deposit copies as required.
16. The Mentoring Coordinator will ensure that the Society's website maintains a register of all mentoring projects which will include the bibliographic details of each work and its index, the index's author (the mentee), the mentor, the year of completion and the distribution format.

Project Finalisation

17. Upon receipt of the mentor's final report, the Mentoring Coordinator will request that the ANZSI Treasurer make a payment of A\$225 to the mentor. This represents the application fee less A\$25 to cover Society administrative costs.
18. The Mentoring Coordinator will also forward details of the mentoring project to the ANZSI President, who will arrange and sign a Certificate of Appreciation for the mentor.
19. At the time of sending a letter of congratulations to the mentee, the Mentoring Coordinator will also send a feedback and evaluation form (sample appended). Details from this feedback will be used to improve the operation of the scheme.
20. The Mentoring Coordinator will remove the title of the indexed work from the Society's list of prospective titles for the mentoring scheme.
21. For each mentoring project, the Mentoring Coordinator will keep the following records for a period of five years, after which they can be disposed of in a secure manner:
 - a. Mentee's application form
 - b. Mentor's reports
 - c. Letter of congratulation
 - d. Feedback and evaluation form

Cessation of a Project

22. A mentoring project can be terminated for the following reasons:
 - a. Mutual agreement between the mentor and mentee, regardless of reason. Note that the application fee will not be refunded, although in cases of conflict it may be possible to arrange for another mentor.
 - b. Voluntary withdrawal by the mentee, regardless of reason. Application fee will not be refunded.
 - c. Illness or major trauma for the mentor or mentee. Application fee refunds will be considered by the Education Committee on a case-by-case basis.
 - d. Not completing the project within the extended (12 months) time limits, in the absence of exceptional circumstances. Application fees will not be refunded.
23. Any other reasons for cessation of a project can be discussed with the mentor or Mentoring Coordinator, and be decided on a case-by-case basis by the Mentoring Coordinator.
24. Either the mentor or mentee (as appropriate) can initiate cessation of a project by informing the Mentoring Coordinator in writing of their reasons.
25. The Mentoring Coordinator will confirm the cessation with both parties, allowing either party to show cause why this should not be so.
26. Once the cessation is finalised, the Mentoring Coordinator will notify the Education Committee. If no response to a cessation confirmation has been received from the mentee within four months of the original notification, the

mentoring project will be deemed to have ceased and the Education Committee will be informed.