# Newsletter of the Australian and New Zealand Society of Indexers Inc.

**Volume 14 • Number 3 • June 2018**

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**ANZSI membership renewal time!**

ANZSI membership starts 1 July annually. With prices of services and fees going up around us, you’ll be glad to know that your ANZSI membership and Indexers Available listing fees remain the same.

One year’s membership for individuals is still only AUD$80 for Australian members, AUD$65 for New Zealand members, and AUD$100 for institutional members.

If you are a life member or an officer with free membership due to your position, please choose the free renewal option to allow us to update our records.

Renewals and other purchases this year will be carried out through the new ANZSI Store at [https://store11799344.ecwid.com/](https://store11799344.ecwid.com/).

You can also increase your visibility to potential clients by joining Indexers Available. The price is for AUD$35 for Australian members and AUD$31 for NZ members.

The ANZSI Store has clear links to follow for different renewals, or if you prefer, email our Membership Secretary at [membership@anzsi.org](mailto:membership@anzsi.org).

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**ANZSI website – latest news**

It’s been a relatively quiet period for both the website and the communications positions, and my main concern has been organising a quick and effective handover to my successors in both positions. Ali Bell has agreed to take over as Webmaster from July. As one of the website’s architects and creators, she is ideally placed to keep it running smoothly and adapt it as needed to ANZSI’s ever-changing requirements. Jenny Browne is happy to take over as Communications Officer. But offers of help from other sources are always welcome. Anyone who wants to learn about the website or MailChimp email system with the aim of assisting or being a back-up person should approach Council.

I’ve been working on getting the merchandising site (‘The ANZSI Store’ on Ecwid) up and running before the handover happens, and before the emails for renewals of membership went out. As usual, we can expect some teething troubles, but once this is in operation it will allow the main ANZSI site to be considerably simplified by the removal of WooCommerce and its associated plugins. This should in turn make it easier to find or train people who can take on website duties.

One ongoing problem is the ‘blow-ins’ who appear in our user list because they have logged on to the site with WordPress credentials. They don’t have any privileged status, or access to anything but the public levels of the site, but they complicate our record-keeping, and so they need to be removed every now and again. I would be interested to learn if other sites have the same problem, and if so what they do about it.

*Jon Jermey*, Webmaster/Communications Officer
New ANZSI Store for renewals and subscriptions

From July 2018, ANZSI will formally switch to a new dedicated transaction site for all its renewals, subscriptions, and Indexers Available applications. This site will also be used to handle subscriptions to courses and the distribution of electronic publications. The purpose of this is to disentangle our money-handling operations from the other functions of the ANZSI website and so simplify the jobs of the Treasurer, Membership Secretary and Webmaster.

The site is hosted by ECWID, a well-known transaction management system. I have been working with them now for nearly a year, and my experience is that their platform is simple, straightforward and easy to use. This should carry through to user transactions as well. The site is in operation now, so any early renewals will also go through it.

From an ANZSI member’s point of view, there will be two main differences to the way things have been done up to now:

1. Renewals and new subscriptions will not result in automatic changes to the member list on the website. These will need to be carried out by the Webmaster and Membership Secretary after an order has been placed and payment confirmed. We will endeavour to do this as quickly as possible, but members may occasionally have to wait a day or two for their order to be carried out.

2. New Zealand members and applicants will be shown prices in Australian dollars, adjusted to reflect exchange rates. They will have the option of paying the equivalent amount in their own currency via PayPal or EWay or making a bank transfer in NZ$ to our Westpac NZ account. Unfortunately, ECWID does not yet support multiple currencies on one site.

I am hoping the changeover will not inconvenience members, but almost inevitably, as with any new system, there will be teething problems. Anyone who is having difficulty understanding or using the site should contact me.

The ECWID system also makes it easy to set up sales for new products, so any member who has an indexing-related product or service they want to sell via ANZSI should contact Council regarding a possible listing.

The site is at https://store11799344.ecwid.com. Please feel free to explore and contact me at webmaster@anzsi.org with any feedback you may have.

Jon Jerney, Webmaster.
Accreditation matters


No changes were made to the Criteria for Accreditation other than very minor re-wording for clarification, as it is important that the criteria remain constant over time. Some editorial changes were also made to the main body of the policy for clarity. These do not materially alter Accreditation requirements or processes.

The main amendments relate to types of documents eligible for assessment, procedures for regaining Accredited status, and inclusion of an appeals process.

Types of documents which can be submitted

The former policy was prescriptive about the types of document which could be submitted for assessment and was quite dated. Publishing models and formats have changed enormously since this part of the policy was drafted many years ago. Accreditation is about assessing the index not the publication and Council determined that it was more practical to remove the prescription of type of publication rather than to try to list all those that we will or might accept.

The policy now stipulates that an index submitted for assessment must be a published index, and, of course, must be wholly the work of the applicant. Self-published works, once excluded, will be allowed. Self-publishing has become a part of main-stream publishing. There are now self-publishing authors including best-selling novelists and highly respected writers, online suppliers to aid self-publishing, businesses that assist self-publishing authors (one such business owner was an invited speaker at the 2017 ANZSI Southern Highlands Symposium) and many local histories and memoirs are self-published.

‘Published index’ may be in a book (print or digital), on a website, or be an index to a journal or collection of works. Database indexing is not yet covered as that requires a different set of procedures and criteria specific to that type of indexing.

Regaining Accredited Indexer status

Accreditation is a benefit of ANZSI membership, and for many years the Registration/Accreditation policy has contained a clause that ‘Accredited Indexer’ status cannot be cited by an indexer unless that indexer is a financial member of ANZSI (or a Life Member). Our Constitution also provides for this in Paragraph B33.

The provision that an ex-member could automatically regain Accredited Indexer status if rejoining within five years of leaving ANZSI was introduced in 2007 with the provisions for five-yearly renewal of Accreditation. It was not removed when the renewal clauses were rescinded in 2012.

The recent amendments remove the provisions that a rejoining member can regain Accredited Indexer status automatically within five years of leaving ANZSI. Instead, an ex-member of ANZSI can apply for Accredited Indexer status to be reinstated on presentation of evidence of:

(a) previous Accreditation, and

(b) continuing indexing activity in the period after membership lapsed. Such evidence will include indexes published, indexing training undertaken, membership of other indexing societies, contribution to related societies, and/or professional development activities related to indexing.
A sub-committee of at least two members of the Accreditation Committee will review the evidence to determine if indexing practice and knowledge is current. A decision by the Committee that the evidence of current practice is sufficient will result in re-instatement of Accredited status. If the evidence is insufficient to show currency of practice, then the member may apply for Accreditation in the usual way. Correspondence and procedural matters are handled by the Receiving Officer, Accreditation, in consultation with the Chair, Accreditation Committee.

So that this policy change does not adversely affect recent ex-members, Council decided that a moratorium for the last two years will be offered to Accredited Indexers who did not re-join for 2016–17 and 2017–18. All ex-members who fall into this category are being notified that the policy has changed and that they can retain their Accredited status if they renew for 2018–19.

Appeals process

The Accreditation Policy mentioned ‘right of appeal’, but no procedures for dealing with appeals against an unsuccessful Accreditation assessment were contained in the policy. New clauses in the amended policy set out a straight-forward process for handling appeals.

Documents

The 2018 Accreditation Policy is in the members area of the website, in the Policies and Procedures section of the Official Documents page: [https://www.anzsi.org/member-area/official-documents/](https://www.anzsi.org/member-area/official-documents/).

Details of the changes may be found in the Council minutes and documents for February 2018: [https://www.anzsi.org/member-area/official-documents/council-minutes-and-reports/](https://www.anzsi.org/member-area/official-documents/council-minutes-and-reports/)

Have you been indexing for several years and been thinking of applying for Accreditation? Why don’t you check out the requirements and send in an application? [https://www.anzsi.org/member-area/accreditation/](https://www.anzsi.org/member-area/accreditation/).

_Sherrey Quinn_, Chair, Accreditation Committee

Council update

Since the flurry of activity for National Indexing Day, reported in the April _ANZSI Newsletter_, Council has turned its attention to administrative matters.

We are pleased to announce that Tanya Edbrooke, an ANZSI member based in Ipswich, was the successful applicant for the Administrative Officer position. Tanya brings a wealth of administrative experience to the role, and she is also a trained indexer.

In April, Council engaged Karen Taylor of Taylored Bookkeeping Services to assist the Treasurer with bookkeeping, financial recordkeeping and reporting.

The Webmaster has implemented a new dedicated transaction site for all renewals, subscriptions, and Indexers Available applications. This will disentangle money-handling operations from the other functions of the ANZSI website and so simplify the jobs of the Treasurer, Membership Secretary and Webmaster. It also provides a solution to the problems which ANZSI experienced with the old payments system. (See Jon Jermey’s article on page 3 of this issue.)
Email messages to all ANZSI members are being used to keep members informed on issues that may need attention before the next scheduled ANZSI Newsletter. For example, we called for expressions of interest in being the ANZSI representative at the Triennial International ICRIS (International Committee of Representatives of Indexing Societies) Meeting – responses to reach the Secretary by 30 June – and the call for nominations for the John Simkin Medal 2018 has been distributed widely (closing date 29 June).

Minutes of the 20 March 2018 meeting and associated documents are in the members’ area of the website, on the Official Documents page: https://www.anzsi.org/member-area/official-documents/. The Minutes of the 29 April meeting will be posted there once they are ratified by Council at its meeting on 18 June.

Sherrey Quinn, Secretary

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**Reviewing indexes to biographies**

At a recent meeting of the ANZSI Melbourne Indexers group, the table was groaning with biographies. Many were weighty tomes with long indexes. Other slimmer volumes had more succinct indexes. With such a variety, there was plenty to discuss. In writing this article, I have kept the discussion general, rather than focus on any particular biography.

The question that heated up the discussion: do you file subheadings under the key figure of the biography alphabetically or chronologically? The debate hinges on the ordering of the concepts such as birth, schooling, marriage, career, death etc. One side argues that the concepts should just be filed in alphabetical order as it makes them easier to find and is consistent with the order of subheadings under other main headings.

The other view is the order of the subheadings should reflect chronological order, rather than using dates. This is made easier if the book has been written that way. Hence the subheadings can be arranged in page number order with a few tweaks to ensure ‘death’ and ‘wills’ appear near the end of the list of subheadings.

Run-on-style is often used for subheadings in biographies. Again, the room was divided into those who felt that if run-on-style was used, subheadings must be in chronological order, and those who thought they should be alphabetical. The chronological/alphabetical debate is often out of indexers’ hands as the index needs to conform to the publisher’s house style. By the way, if you were wondering, settings in indexing software packages make it possible to rearrange subheadings in page number order. If you are unfamiliar with this function, test it out.
Then there are indexes where there is nothing under the person's name. This sets extra challenges for the indexer. It means a main heading such as ‘schools’ can include the subheading ‘Smith’s experiences’. Some felt this was going a bit too far as there are some aspects that are best placed under the person's name. For example, ‘birth’ as a main heading can look odd.

One case was found where the key person’s name was followed by ‘passim’. This means the person is mentioned throughout the whole book – it is a biography!

Pulling out themes under the person's name can be done in several ways. Some biographies highlight these with headings all in uppercase or small capitals, such as APPEARANCE, HEALTH, HOUSES, INTERESTS, TRAVELS or WORKS BY. These again may be arranged alphabetically or in some other logical order. For example, this fictitious index uses chronological order for subheadings under name and alphabetical order under group headings with run-on style:

Smith, Adam: grandparents, 6; parents, 7;
  family background, 9–14; birth, 10, 14; adolescence 15–40 ...
APPEARANCE: beard, 25; clothes, 25, 37, 36;
  hair thinning, 190;...
HEALTH: in childhood, 11, 12; eyesight, 19, 20 120...
HOUSES: in Canberra, 67; 28; childhood, 9, 10;
  plans to build, 198–200

Alternatively, this could be arranged using main headings:

Smith, Adam
  adolescence 15–40
  birth, 10, 14
  family background, 9–14
  grandparents, 6
  parents, 7...
Smith, Adam, appearance
  beard, 25
  clothes, 25, 37, 36
  hair thinning, 190;
Smith, Adam, health
  in childhood, 11, 12
  eyesight, 19, 20, 120...
Smith, Adam, houses
  in Canberra, 67; 28
  childhood, 9, 10;
  plans to build, 198–200

Grouping topics like this was considered preferable, as the mere mention of sub-subheadings or even sub-sub-subheading brought a groan from the group.

Repeatedly prefacing subheadings with the same word is another way topics can be grouped. For example, ‘travel to’, ‘letters to’, ‘views on’ or even just ‘on’.
Using dates can be a useful way to group material. Year subheadings in a biography of a sportsman made it clear which years he participated in a particular tournament.

For authors or musicians, it is often easier to have a separate index to their works. Again, these can be grouped or listed in appropriate ways that may not be alphabetical. In one author's biography, his works were preceded by year published, rather than in alphabetical order. With added publication details, the separate index was like a bibliography with page numbers.

Indexes to some biographies were only name indexes. In one case, the index was even headed ‘name index’. In a couple of cases, this was taken to the extreme and there were long lists of undifferentiated page numbers after all names except the key person where there were subheadings. This may have been driven by limitations on space available for the index. Sometimes long lists of undifferentiated page numbers can’t be avoided, however finding some way to group them with a subheading is encouraged.

When a person is known by their initials, eg ‘JC Smith’, should the indexer enter them as ‘Smith, JC’ or ‘Smith, John Charles (JC)’? It was decided that the second option was preferred. Distinguishing people with the same name is a common problem. Qualification with dates, profession or relationship to the key person helps. Qualifications are also useful if only the first name is known. In the case of ‘Templeton (rat)’ it can cause you to pause, until you realise it refers to a fictional animal character. Filing can also initially look odd when you find ‘Mr Ed’ under M, until you realise they are referring to the talking horse.

Inserted sections of photos are common in biographies. The photos are often unnumbered and there are no page numbers. The easiest solution suggested was to index the photo to the page number of the section, even if not actually numbered. This could be as ‘plate page 4’ or ‘ps14’, where ‘ps’ is explained in the index introduction as the photo section.

Instructions from authors can influence what goes in the index or what is left out. Family feuds can mean items in the text are not indexed, or names left out. Ideally both branches of the family are teased out in the index as this can assist book sales.

Each biography has unique challenges. With each work, remember to consider the reader and place index entries in a logical spot, so the reader can find the material they are interested in. Examining how other indexers have dealt with similar issues is a great way to help you move your index along.

Clarify any preferred layout requirements and discuss any proposed variations, such as an additional index for works, with your contact (editor, publisher, or author), as early as possible.
For further tips on indexing biographies have a look at the references mentioned on the ANZSI website (https://www.anzsi.org/resources/reading-lists/types-of-indexes/#biog), or track down a copy of *Indexing biographies* by Hazel Bell.

**Mary Russell**

This article originally appeared in *Melbourne Indexers Bulletin* No. 33 May 2018.

**Correction**

In the *ANZSI Newsletter* 14(2) April 2018 we unfortunately omitted the attribution for the article ‘About the Thesaurus to the Index to the ANZSI Newsletter indexing project’ by Mary Russell. This article originally appeared in *Melbourne Indexers Bulletin* No. 29 January 2018.

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**Style happenings: progress on the revision of the Commonwealth Style Manual**

The last version of ‘the style manual’ was the *Style manual for authors, editors and printers* 6th edition, published in 2002.

The Digital Transformation Agency (DTA), an Australian Government agency which exists

‘... to make it easy for people to deal with government. We help government transform services to be simple, clear and fast ...’

now has responsibility for the long-overdue update to the Commonwealth *Style Manual*.

A stakeholder information session (held in Canberra and by teleconference) was presented by DTA on 20 February 2018. Stakeholders present included representatives of government agencies, the publishing industry, graphic design companies, editor/writing companies, freelance editors and indexers. ANZSI was represented by the Secretary, Sherrey Quinn.

DTA has completed what they call the Discovery phase of the project, in which they have:

- identified interested parties
- sought to understand who the current and prospective users are
- identified what users need (including different needs of different groups)
- learned how the *Style Manual* is used
- collected information on gaps and wish-list points
- considered how it will fit in with the other digital guides and standards that DTA promulgates.
During this phase DTA interviewed 25 people from government agencies (Commonwealth government agencies, representatives of NSW and Victorian state governments and private sector editors) who work in roles such as editor, communicator, policy writer, report writer, web and social media writer, speech writer, graphic designer, manager, researcher, contractor, parliamentary liaison, and indexer. (If the indexer who was interviewed during this process is reading this column, please contact Sherrey Quinn at the email address below.)

DTA found that there are four types of Style Manual users:

1. ‘All-round wordsmiths’ – don't use it often, but when they do it is vital
2. ‘Language pros’ – with passion for language and correct usage
3. ‘Rule seekers’ – who want to be told what they are supposed to do
4. ‘Newcomers’ – who need to know what they don’t know.

DTA also reviewed previous research, including other standards and style manuals, suggestions from the publishing industry and the academic community, and unsolicited comment from groups and individual users from 2004 to date.

Areas in which the Style Manual is not currently meeting user needs have been identified:

- barriers to access (print-only, scarcity of copies, cost)
- barriers to findability (size, density, labelling {terminology}, specialised content)
- content gaps (such as digital topics, web citation)
- grey areas and differing interpretations of rules.

Personal preferences have been identified as a threat to quality, consistency and efficiency (examples cited include the ‘programme/program’ dilemma, and double spacing after a full stop).

In the next stage of the process (‘Alpha’) DTA will explore options for solutions to user needs in the writing/editing context and identify the ‘minimum viable product’ (MVP) – the simplest thing they can build that meets user requirements. These requirements are summarised as the ‘need for authority’, ‘need for answers’, ‘need for evidence’, and ‘need for education’.

No decision has yet been made on the format(s) of the end product, but it is most likely to be digital as the default, not the exception. Further information will be shared with stakeholders later in the year (around July).

This article is based on DTA information shared with stakeholders. Further information is available from the DTA website: https://www.dta.gov.au/what-we-do/policies-and-programs/style-manual/.

Sherrey Quinn, Secretary  secretary@anzsi.org
What’s in *The Indexer*?

The June issue of *The Indexer* is out in hardcopy and on Ingenta and Lulu.

Did you know that the electronic version of *The Indexer* is available to subscribers in the last week of the month before the month of publication?


If you don’t subscribe, here’s what you’re missing out on!
ANZSI events

For full details, follow the link from the title of each event, or go directly to the Events webpage.

Monday, 18 June 2018
ANZSI Council: Meeting
7:00 – 8:30 pm, teleconference

Thursday, 5 July 2018
Melbourne Indexers: Improving indexing speed
6:00 – 8:00 pm, ‘Glenferrie’ Meeting Room, Hawthorn Library, 584 Glenferrie Road, Hawthorn, Victoria. Optional dinner afterwards.

More haste, less speed, they say (and we have probably all experienced). We will discuss tips on how to improve your indexing speed.

Sunday, 29 July 2018
ANZSI Council: Meeting
4:00 – 5:30 pm, teleconference

Thursday, 2 August 2018
Melbourne Indexers: Selecting indexing terms
6:00 – 8:00 pm, ‘Glenferrie’ Meeting Room, Hawthorn Library, 584 Glenferrie Road, Hawthorn, Victoria. Optional dinner afterwards.

In a group exercise we will select indexing terms for a short article and compare the results.

Monday, 10 September 2018
ANZSI Council: Meeting
7:00 – 8:30 pm, teleconference

Tuesday, 30 October 2018
ANZSI Annual General Meeting (tentative date)
7:00 – 8:30 pm, teleconference
Other events

Indexing Society of Canada / Société canadienne d’indexation (ISC/SCI) Conference 2018 : Congrès 2018

7–10 June 2018, Winnipeg, Manitoba, Canada
‘Navigating the confluence of text and context.’ Conference venue: the historic Fort Garry Hotel.
Details at

The Society for the History of Authorship, Reading and Publishing (SHARP) Annual Conference 2018

9–13 July, Sydney and Parramatta, New South Wales, Australia
SHARP 2018 will be hosted by the Western Sydney University Library from 9-13 July 2018.
State Library of New South Wales: 9 July 2018
Western Sydney University Parramatta South Campus: 10-12 July 2018
Optional Excursions: 13 July 2018
This will be the first time that the annual conference of the Society for the History of Authorship, Reading and Publishing is held outside of Europe and North America in its 25-year history.
The theme “From First to Last” – of origins, endings and renewals – acknowledges book history’s expansion worldwide across disciplines, cultures and languages.
(Mary Coe, ANZSI member and past President, will be giving a paper at the conference.)
http://sharp2018.sydney/

Society of Indexers (SI) Annual Conference 2018

9–10 September 2018, Lancaster, England, UK
‘The 2018 conference will be held at Lancaster University, where we will share a plenary session and a gala dinner with the Society of Editors and Proofreaders, who will be having their own conference at the same venue.’
Conference details at
This is the first time we have used the event booking system on the new website for a conference and there is a rather complicated system of coupon codes for ICRIS reps and members of other indexing societies to obtain the relevant discounts on the various conference ‘packages’. These are set out below. If anything is not clear, contact conference@indexers.org.uk
Coupon codes applying to full prices: ICRIS reps
If booking the full conference basic package, use coupon code C150
If booking the full conference two-night package, use coupon code C175
If booking a non-resident place plus gala dinner, use coupon code C155
If booking a non-resident place with no gala dinner - i.e. just the conference itself, for which you are entitled to free registration, then please contact the SI office (admin@indexers.org.uk) and Paul will add you to the delegate list.

Coupon codes applying to full prices: members of other indexing societies - please share this information with your members
If booking the full conference basic package, use coupon code C55
If booking the full conference two-night package, use coupon code C80
If booking a non-resident place plus gala dinner, use coupon code C40
If booking a non-resident place without gala dinner, use coupon code C25

China Society of Indexers

18 October 2018, Shanghai

‘Meeting with members. 2018 on 18th October jointly participated in 2018 Annual International Index Alliance Summit.’

2018 Triennial Meeting of International Committee of Representatives of Indexing Societies (ICRIS) in Shanghai on 18 October 2018

The Chinese Society is keen to know who is likely to be coming to the Triennial meeting 17th October and/or conference 18-19th October.

They are arranging to reserve a group of rooms for the conference at the Crowne Plaza Shanghai Fudan (https://www.ihg.com/crowneplaza/hotels/us/en/shanghai/shgfd/hoteldetail) which is conveniently located in the campus area, the rate is about 750RMB per night.

They would like to have a head-count of the attendance as early as possible to secure the rooms and good rate. Please let them know via cnindex@fudan.edu.cn

I would be grateful if you could also advise me directly and I will confirm with the Chinese Society as well.

Madeleine Davis, President
M: 0417 040 598 president@anzsi.org

**** Remember to contact ANZSI Council if you are interested in formally representing ANZSI at a conference. Subsidies for registration and/or partial expenses may be available. ****
Contact information

General email: info@anzsi.org

ANZSocietyIndexers
@ANZSI_indexers

ANZSI Council 2017–2018

President: Madeleine Davis
Vice-President: Terri Anne Mackenzie
Secretary: Sherrey Quinn
Treasurer: Michael Wyatt
Council members: Shirley Campbell, Elisabeth Thomas, Denene Cavanagh and Juliet Richters.

Branch and regional contacts

Please consult the ANZSI website for details of regional and interest groups, and their contact people.

Newsletter

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About the Newsletter

The ANZSI Newsletter is published six times a year, every two months.
Opinions and statements expressed in the Newsletter are those of the individual contributors, and do not necessarily reflect the opinions of the Society.
Submissions may be edited for clarity, space and uniformity of style. Selection of content is at the discretion of the Editor / ANZSI Council.

Schedule

The next issue will appear in August 2018.
The contribution deadline is Friday 27 July 2018.
Please send contributions by email to the editor, Elisabeth Thomas, at editor@anzsi.org

Advertising rates

For advertising rates, please visit our website.