



Australian and New Zealand
Society of Indexers Inc.

ABN: 38 610 719 006

Annual Report

2016 – 2017

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President's introduction

Mary Coe, President

This is the ANZSI Annual Report for 2016–17; it will be presented at the Annual General Meeting in Sydney on 24th October 2017. The report has been compiled from contributions from Council members and officials to represent all of the work done by ANZSI. Thank you to Sherrey Quinn for coordination and editing of the report, and to all the ANZSI officials whose contributions have been included below.

2016–17 President's report

This has been a stable year for ANZSI after several years of adjustment due to an organisational restructure. The multi-location ANZSI Council has continued, with representatives from several regional areas. Council meetings continued to be held successfully via teleconference.

Regional groups in the Australian Capital Territory, New South Wales, New Zealand, South Australia, and Victoria have continued to offer events and services for members. The Melbourne Indexers group was particularly active in offering regular meetings and distributing a group newsletter. Melbourne Indexers also began planning to host an "Indexes through publishers' eyes" seminar. The Canberra Region Indexers and NSW Indexers also met regularly and jointly organised a symposium in the Southern Highlands region of NSW. Financial resources have been distributed to regional groups as needed throughout the year.

ANZSI Council placed high value on communications with society members through several channels, including a newsletter, website, and email system. The ANZSI newsletter continued to be published in an electronic format on a bimonthly publication schedule. The ANZSI website performed well, and the online commerce system was used for membership renewals, payments for courses, and symposium registration. Emails were regularly sent to members notifying them of upcoming events or courses. General enquiries about indexing and the society were also regularly handled via email.

ANZSI continued as a member of the International Agreement of Indexing Societies (ICRIS). ANZSI representatives attended the ICRIS informal meeting at the Indexing Society of Canada/Société canadienne d'indexation (ISC/SCI) conference in Montreal, Canada. ANZSI also welcomed AFEPI Ireland as a new member of ICRIS.

2016–17 acknowledgements

Thank you to the many hard-working members of the society, who have contributed so much time and effort to keeping ANZSI running and without whom the Society could not function. A complete list of officers, group convenors, and committee chairs can be found later in this report, but special thanks much go to the following Council members, who contributed so much over the past year:

Sherrey Quinn (*Secretary*) has done an excellent job writing Council meeting minutes, distributing documents, and handling all of the other many and constant demands placed upon her. Sherrey also continued as *Chair of the Accreditation Committee*. **Michael Wyatt** (*Treasurer*) contributed many hours handling financial transactions, writing budgets, and filling out the many forms required for investment and for transferring money between Australian and New Zealand accounts. Michael also took on other work, such as maintaining an inventory of resources and acting as ANZSI

representative on the ISO Technical Committee. Once again, his careful attention to detail and commitment have kept the society running smoothly. **Terri Anne Mackenzie** (*Vice-President*) was Groups Coordinator, which provided an important link between Council and group convenors. Our *General Council Members* (**Elisabeth Thomas, Shirley Campbell, Denene Cavanagh, Kerry Anderson**) not only supported Council but played many other roles, including newsletter editor, Twitter manager, Receiving Officer for the Accreditation Committee, and administrative assistant. Their willingness to volunteer their time and skills in so many different ways was a great contribution to the society.

Council report

Sherrey Quinn, Secretary

Council membership

| | |
|-----------------|---|
| President | Mary Coe |
| Vice-President | Daphne Lawless (until October 2016); Terri Mackenzie (from October 2016) |
| Secretary | Kerry Anderson (until October 2016); Sherrey Quinn (from October 2016) |
| Treasurer | Michael Wyatt |
| Council members | Shirley Campbell; Elisabeth Thomas; Denene Cavanagh (from October 2016); Terri Mackenzie (until October 2016) |

Officers of the Society

| | |
|---------------------------------------|--|
| Editor of the <i>ANZSI Newsletter</i> | Elisabeth Thomas |
| Education Coordinator | Glenda Browne |
| ICRIS representative | Alan Walker was the ANZSI authorized representative at the 2017 informal ICRIS meeting at Montreal in June 2017. Mary Russell is the ICRIS International. |
| Membership Secretary | Mei Yen Chua |
| Web Manager | Denise Sutherland (until July 2016); Kate Jera (from August 2016 until April 2017); Jon Jerney (from May 2017) |
| Group Coordinator | Terri Mackenzie (from October 2016) |

Group Convenors

| | |
|-------------------------------|-------------------|
| ACT Region Indexers | Denise Sutherland |
| Aotearoa/New Zealand Indexers | Daphne Lawless |
| Indexers SA | Jane Oliver |
| Melbourne Indexers | Mary Russell |
| NSW Indexers | Glenda Browne |
| Conference Ideas Group | Terri Mackenzie |
| Education Interest Group | Glenda Browne |

Chairs of Committees

| | |
|--------------------------|---|
| Accreditation | Sherrey Quinn |
| Awards | Shirley Campbell, Committee Chair; Tracy Harwood, Judging Panel Convenor |
| Promotions and Publicity | Denise Sutherland (until May 2017); vacant from June 2017 |

Meetings

Council meetings were held by teleconferencing in July, August and October 2016, and January, March and May 2017. Minutes and documents are on the website:

<https://www.anzsi.org/member-area/official-documents/council-minutes-and-reports/>

The ANZSI AGM was held on 25th October 2016 via teleconference.

Review of ANZSI policies

Council has continued its regular review of ANZSI policies. See the website for the most recent edition of all policies and position descriptions (<http://www.anzsi.org/member-area/official-documents/>).

Membership report

Mai Yen Chua, Membership Secretary

Membership Fees

The Society used a single subscription period covering the financial year (i.e. 1 July–30 June), with subscriptions falling due on 1 July of each year. Members who join the Society in June of any year will be deemed to be financial until 1 July the following year. Existing members are extended a three-month period of grace within which to renew their subscriptions. Subscribers who have not renewed their subscriptions by 30 September are then deemed to no longer be members.

Table 1. Subscription Fee Structure, July 2016–June 2017

| | Individual Membership | Institutional Membership |
|---|-----------------------|--------------------------|
| Australian members Online payments Cheque/money order | A\$80 | A\$100 |
| New Zealand members Online payments | A\$70.00 | A\$90.00 |
| New Zealand members Cheque/money order EFT payments | NZ\$80.00 | NZ\$100.00 |

Membership statistics

Total membership

At 30 June 2017, ANZSI had a total of 74 members. In 2016 there were 104 members. The figures are broken down in the table below. With the dissolution of state branches, all members are categorised according to states they live in and type of membership they have.

Table 2. ANZSI Membership at 30 June 2017

| State/Region | Life Memberships | Corporate Memberships | Personal Memberships | TOTAL Membership |
|---------------|------------------|-----------------------|----------------------|------------------|
| ACT Region | 2 | 2 | 4 | 8 |
| NSW | 3 | 0 | 22 | 25 |
| NT | 0 | 0 | 0 | 0 |
| NZ | 0 | 0 | 6 | 6 |
| QLD | 0 | 0 | 5 | 5 |
| SA | 0 | 0 | 5 | 5 |
| TAS | 0 | 0 | 3 | 3 |
| VIC | 2 | 1 | 17 | 20 |
| WA | 0 | 0 | 2 | 2 |
| Overseas | 0 | 0 | 0 | 0 |
| TOTALS | 7 | 3 | 64 | 74 |

Comparison of 2017 and 2016 statistics

The table below compares the total membership figures at 30 June 2016 with those at 30 June 2017. Table 3. Membership figures at 30 June 2016 compared to 30 June 2017. The 'No affiliation' consists of states of NT, SA, TAS, WA and overseas, see above for the breakdown of each non-affiliated state. There were no gains in membership during the 2016 to 2017 period, but a loss of 56 members.

Table 3. Comparing membership figures 2016 and 2017

| State/Group | Members at 30 June 2016 | Members at 30 June 2017 | Net Gains | Net Losses |
|---|-------------------------|-------------------------|-----------|------------|
| ACT Region | 26 | 8 | 0 | 17 |
| NSW | 30 | 25 | 0 | 6 |
| NZ | 12 | 6 | | 6 |
| QLD | 14 | 5 | 0 | 9 |
| VIC | 31 | 20 | 0 | 11 |
| No group affiliation (this includes NT, SA, TAS, WA & overseas) | 17 | 10 | 0 | 7 |
| TOTALS | 130 | 74 | 0 | 56 |

Accredited Indexers

Accredited indexers may only claim this status as long as they are financial members of ANZSI. At 30 June 2017 there were 15 accredited indexers in ANZSI.

Members Register and Member Directory

ANZSI collects and manages information about its members in accordance with the requirements of the *Associations Incorporation Reform Act 2012* (Vic) (AIR Act) as detailed below.

Members Register

This is a complete list of current and former members of ANZSI. The Membership Secretary has responsibility for compiling and maintaining the register. The register lists only those details required by the AIR Act, i.e. (a) the names, dates of membership and contact details of current members, and (b) the names and dates of membership of former members.

Member Directory

The Member Directory of current members (on the ANZSI website) is to be treated as a subsection of the official Members Register. In addition to displaying the names, telephone numbers and email

addresses of current members, it now also shows the year a member joined the Society, as required by the AIR Act.

Inspection of the Member Register

All members of ANZSI have the right to access the Members Register if they have an appropriate reason for doing so (see below). At present, all current members are able to access the Member Directory of current members on the ANZSI website. Existing members can also view their own details in the Member Database by viewing their Member webpage at 'Update your Details' in the Members' area of the website. Access to the complete Member Register of current and former members may be granted at the discretion of the ANZSI Council, upon a written application to the Secretary, ANZSI Council, stating the reason for the access request.

Use of information in Member Register/Member Directory

The information contained in the Member Register and Member Directory may only be used if it is directly related to the management, activities or purposes of the Society.

Restricted access to a member's details

While the names and dates of joining of all current ANZSI members will be listed on the Member Directory, members have a choice over whether their contact details are also listed. If a member does not wish to have their contact details displayed on the Member Directory this option is available on membership application and subscription renewal forms. Members may also select this option at any time by updating their details in the Members Area of the ANZSI website. ANZSI does not make any judgement on a member's decision to choose not to make their contact details public, and members are not required to specify why they wish to withhold their contact details.

Indexers Available

Advertising Fee

Members were charged an annual fee for a listing in Indexers Available that covered the financial year (i.e. 1 July–30 June) and was due for payment on 1 July 2017. A three-month period of grace to pay the fee was extended to members listed on the Indexers Available register. After this time, if payment was not received, a member's entry was deleted from the register.

Table 4. Indexers Available Annual Advertising Fees, July 2016 – June 2017

| | | |
|---------------------|---------------------------------------|-----------|
| Australian members | Online payments Cheque/money order | A\$35.00 |
| New Zealand members | Online payments | A\$35.00 |
| | Cheque/money order EFT payments | NZ\$35.00 |

Indexers Available statistics

At 30 June 2017, there were 40 members with an *Indexers Available* listing. This figure is broken down in the table below according to states and type of membership.

Table 5. Members listed on *Indexers Available* at 30 June 2017

| Location | Total <i>Indexers Available</i> subscribers at 30 June 2017 |
|---------------|---|
| ACT | 4 |
| NSW | 16 |
| NZ | 6 |
| QLD | 2 |
| SA | 12 |
| TAS | 2 |
| VIC | 8 |
| WA | 1 |
| TOTALS | 40 |

Treasurer's report

Michael Wyatt, Treasurer

[Audit information to come later]

Receipts and Payments Australian and New Zealand Society of Indexers

1/07/2016 - 30/06/2017

| Receipts | \$ | \$ |
|---|---------|-----------------|
| Accreditation | 180.00 | |
| Indexers Available | 1574.71 | |
| Interest Received | 190.74 | |
| Membership | 7129.55 | |
| Symposium | 3935.00 | |
| Training | 240.00 | |
| Total Income | | 13250.00 |
| | | |
| Payments | \$ | \$ |
| Accounting Fees | 790.00 | |
| Advertising & Promotion | 50.00 | |
| ANZSI Newsletter | 750.00 | |
| Bank Charges | 638.00 | |
| Gifts | 221.90 | |
| Insurance | 779.00 | |
| Library | 71.96 | |
| License Fees | 55.80 | |
| Medal | 156.00 | |
| Merchant fees | 911.90 | |
| Postage | 737.44 | |
| Printing & Stationery | 110.00 | |
| Symposium Costs | 3005.00 | |
| Teleconferencing | 618.95 | |
| Travel Expenses | 282.30 | |
| Venue hire | 137.50 | |
| Website | 3764.86 | |
| Total Expenses | | 13080.61 |
| | | |
| Excess of Receipts over Payments | | 169.39 |

Education Officer report

Glenda Browne, Education Officer

ANZSI educational opportunities this year have been gained from informal and semi-formal Group activities.

The Education Special Interest Group mailing list is primarily used for sharing of information, and has not had any recent group discussions or activities.

This year saw the planning of the ANZSI Southern Highlands Symposium, with a one-day Basic Indexing Course and a number of other training and professional development events scheduled.

Newsletter report

Elisabeth Thomas, Editor

Following the changes in 2015–16, the *ANZSI Newsletter* has had a stable and successful year. The move to bimonthly / 6 issues per year continues to encourage member contributions, resulting in a substantial newsletter each issue. International interest continues to be positive, including several articles requested by *The Indexer* for republication.

We have a closer, if informal, 'news and content' relationship with Editors NSW, as *ANZSI Newsletter* editor Elisabeth Thomas, is also the editor of their newsletter *Blue Pencil*.

Following Denise Sutherland's resignation from the role, May 2017 saw Jon Jermey return to a post he held some years ago, as the ANZSI webmaster and communications officer, completing the ANZSI communications team.

Please consider sharing your knowledge and experience with colleagues by writing for YOUR newsletter.

Website report

Mary Coe, President and Jon Jermey, Webmaster

There were several changes in the webmaster/email coordinator role throughout the year. Denise Sutherland resigned as webmaster and email coordinator and was replaced by Kate Jera on 1 August. Kate then handed over the reins to Jon Jermey in May.

Membership renewals were sent on time and payments came in steadily, despite some initial hiccups due to software plugin malfunctions. Thanks are due to Denise Sutherland for fixing these errors, with help from Kate Jera.

Changes to the online commerce system were initiated on 1 July 2016, including the removal of GST (after the society's deregistration) and use of a prorated membership system. However, due to a conflict between the renewal period and the prorated system, it was turned off until September to allow for membership renewals at the regular rate.

There were 420,809 hits on the website in 2016–17. Most of them came from Firefox users at 58%, followed by Chrome with 22% and Microsoft Internet Explorer with 5%. The most popular search engine term that brought people to the site was 'types of indexes', or some variant thereof.

Publications & Promotion report

Denise Sutherland, Convenor

The John Simkin medal was promoted on Twitter and Facebook, and by an advertisement in Thorpe-Bowker's Books+Publishing weekly newsletter and website (<http://www.booksandpublishing.com.au>). The ad ran for one week in the classifieds section of their website. There was a spike of hits on the John Simkin Medal page after the ad was placed.

The CafePress site (online shop), originally a publicity initiative of the ACT Region Branch, has received little traffic and the site was closed In May 2017. Designs for the merchandise have been archived and are available if required in future.

Council discussed reciprocal membership of related societies and it was agreed that ANZSI would pursue formal alliances (for reciprocal activities and rights) with certain societies rather than taking out annual memberships. At the time the P&P team had no members, due to resignations, and it was agreed that no action could be taken concerning reciprocal memberships until the Publicity and Promotions Team was re-formed.

A call for expressions of interest in joining the P&P Team was placed in the June 2017 newsletter, but there had been no responses by 30th June.

Accreditation Committee report

Sherrey Quinn, Chair; Shirley Campbell, Receiving Officer – Accreditation

Accreditation Committee members

Sherrey Quinn (Chair); Madeleine Davis; Tordis Flath; Jean Norman; Michael Wyatt and Shirley Campbell – Receiving Officer (Accreditation).

Applications for Accreditation

Two applications were assessed during 2016–17; neither was successful.

An appeal which was in progress at 30 June 2016 was finalised. It was not successful.

Fee

The Accreditation application fee from 1 July 2016 was A\$90 and NZ\$90.

Meetings

The committee conducted its main business by email and telephone during 2016–17. The Chair and Receiving Officer met from time to time, and all members of the committee carried on discussion of business by email.

Accreditation Policy

Amendments to the Accreditation Policy to address some inconsistencies and to document the appeals process were being drafted at 30 June 2017 for consideration by the Committee.

Proposed Accreditation Workshop

Interest in an Accreditation preparation workshop was canvassed early in 2017, with plans to present it in July 2017 at the joint ACT Region/NSW group symposium at Sylvan Glen. There was interest from some members but numbers were not sufficient to hold the event at the proposed venue.

Awards Committee report

Shirley Campbell, Chair, Awards Committee

The 2016 John Simkin Medal Awards Committee members comprised Shirley Campbell (Receiving Officer, and Chair, Awards Committee), and a judging panel whose members were Tracy Harwood (Judging Panel Convenor), Alan Walker and Jean Norman.

Applications for the Medal were publicised widely and nominations closed on 29 July 2016.

Nine applications were received, with one withdrawn before judging. The results were announced at the Annual General Meeting on 25 October 2016. The medal was not awarded. One Highly Commended certificate was awarded, to Sherrey Quinn for her index to *Global implications of development, disasters and climate change; Responses to displacement from Asia Pacific*, edited by Susanna Price and Jane Singer, published by Routledge/Taylor & Francis, 2016. The report of the Judging Panel was published in the ANZSI newsletter, vol 12, no 6, December 2016, p. 2–3.

The next John Simkin Medal Awards will be offered in 2018, when the Awards Committee and the Judging Panel will be reconstituted in accordance with the ANZSI Awards policy.

International Committee of Representatives of Indexing Society (ICRIS) report

Mary Russell, International Coordinator of ICRIS

In September 2016 it was unanimously agreed for Association of Freelance Editors, Proofreaders and Indexers of Ireland (AFEPI Ireland) to join ICRIS. ANZSI Council formally welcomed AFEPI Ireland to ICRIS.

Alan Walker represented ANZSI at the informal ICRIS meeting held at the ISC/SCI conference in Montreal in June. Mary Coe represented ANZSI at the Society of Indexers Conference in Oxford in June. Mary Russell, as International Coordinator of ICRIS, attended the ISC/SCI, ASI and SI conferences.

ANZSI Group Co-ordinator's report

Terri Mackenzie, Group Co-ordinator

Regional Groups

- Aotearoa/New Zealand Indexers Group
- Canberra Region Indexers
- Melbourne Indexers
- NSW Group
- Indexers South Australia

Interest Groups

- Education Group

Aotearoa/New Zealand Indexers Group

Membership of our group stands steady at 13.

No group meetings have taken place in the year.

No books have been added to our library.

Daphne Lawless, A/NZIG convenor

Canberra Region Indexers

Denise Sutherland, Convenor

The group had 26 members at the start of the year but membership had dropped by 40–50% by the end of by 30 June 2017. This dramatic loss is largely due to retirement of long term members.

Activities included informal discussion and meetings:

- August 2016 – a behind-the-scenes visit to the National Library of Australia (NLA) followed by afternoon tea.
- October 2016 – Lunch at the NLA
- December 2016 – Christmas brunch at the Oaks Brasserie
- February 2017 – Lunch at Beyond Q
- June 2017 – Lunch at the NLA

During 2016–17 the Canberra Region and NSW Indexers Groups planned for a joint symposium at Penrose, Southern Highlands, to be held after the end of the year (in July 2017). Denise Sutherland (ACT Region Group) and Mary Coe (NSW Group) organised this event.

Melbourne Indexers

Mary Russell, Convenor

Melbourne Indexers has grown to include 40 members. * During the year it held six meetings:

- August – editing the *ANZSI Newsletter* index
- October – what was your most challenging index?
- November – how are books constructed
- February – Melbourne Indexers challenge
- April – updating an index
- June – financial aspects of indexing.

The *Melbourne Indexers Bulletin* continues to be published 11 times during the year and is available at <https://www.anzsi.org/about-us/groups/melbourne-indexers/>. The library is used and appreciated by members.

With building works expected on the church hall we have been using, we are exploring holding meetings in a library during the day.

The history of the establishment of the Victorian Indexing Club (the VIC), the previous name of the Melbourne Indexers, was written by Mary Russell and Nikki Davis and published in *The Indexer* in March 2017.

ANZSI Newsletter index project

The Melbourne Indexers has taken on *ANZSI Newsletter* index project to index the first 20 years 1973–1992. With the help of several volunteers these years have been indexed and the merged years are now being edited. To assist with consistency Michael Ramsden has created a thesaurus. The next stage will be to convert the page entries into hyperlinks to the appropriate article and place the index on the website.

NSW Indexers

Glenda Browne, Convenor

There are currently thirteen members of the NSW Indexers Group. We use a Google Groups mailing list to share information with members and to organise face-to-face events.

We met three times between July 2016 and June 2017.

- September 2016 at the home of Glenda Browne, Jon Jerney and Jenny Browne in Blaxland, with special guest DeDe Coe (Mary Coe's mother) visiting from the United States.
- January 2017 for a belated Christmas get-together at the Kirribilli Club. Here we welcomed new member Denene Cavanagh. Some of us had an enjoyable (but windy) walk back to the city across the Harbour Bridge.
- April 2017 at the Botanic Gardens, Sydney, for an informal lunch. Here we welcomed new (returning) member Juliet Richters.

We promoted the Editors NSW's monthly lunch when it was held in the Blue Mountains, and four ANZSI members attended. Many of us also plan to attend the ANZSI Symposium in July 2017 in

* Members may be resident outside Melbourne

Penrose, Southern Highlands, organised by the Canberra Region and NSW Indexers Groups (with special thanks to Denise Sutherland and Mary Coe).

Indexers SA

Jane Oliver, Convenor

Indexers SA held one meeting, on 10 May 2017.

Present: Jane Oliver, Janet Wilkinson, John Liddle, Judy Richter, Silvia Muscardin. Apology: Margaret McDonell

Janet Wilkinson reported on the *Meet the Old Colonists* portrait exhibition on show at the Library. 'The Old Colonists Banquet Group' of men was commissioned by businessman Emanuel Solomon to commemorate a free banquet he held at the Adelaide Town Hall on 28 December 1871 for fellow colonists 'who date their arrival before 1841'. The companion mosaic of women was created partly as a consolation to women who applied for tickets, only to be told that the banquet was for 'The Male Sex'. Janet explained how indexes to the mosaics were compiled.

The link to the men's mosaic is <http://collections.slsa.sa.gov.au/resource/B+47769>

The link to the women's mosaic is <http://collections.slsa.sa.gov.au/resource/B+19985>

Silvia Muscardin reported on the proposed indexing project at the Adelaide Zoo. This project is on hold pending appointment of a librarian at the Zoo.

John Liddle demonstrated the use of XE tags in preparing his index to the book *Memory, Place and Aboriginal–Settler History: Understanding Australian's Consciousness of the Colonial Past* by Skye Krichauff. John reported that he found the XE tag process very laborious and he demonstrated the main problems using the tags. After starting the index, John found there was software that enables the indexer to use normal indexing software, such as Cindex, Macrex or SKY and then import the index into a Word document to produce the required XE tags. Some publishers require indexes using XE tags in Word. An advantage is that if the text is to be reformatted in future, because the XE tags are next to the index terms in the text, they follow the text and a new index is not required.

Education Group

Convenor: Glenda Browne

There are currently nine members of the ANZSI Education Group. We use a Google Groups mailing list to share information with members, but have had little discussion.

Some members of the group participated in the Indexing Workshop event run as part of the ANZSI Symposium in Penrose (the indexing started in the 2016-2017 financial year, but the event was held in July 2017).

End of ANZSI Annual Report for 2016–2017