



Australian and New Zealand  
Society of Indexers Inc.

ABN: 38 610 719 006

GPO Box 2069  
Canberra ACT 2601  
[www.anzsi.org](http://www.anzsi.org)

Annual Report  
2019–20

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## INTRODUCTION

### President's report

*Madeleine Davis, President*

This is the Annual Report for 2019–20. It will be presented at the Annual General Meeting held by video conference on 10 August 2020. The report has been compiled with contributions from Council members and officials to represent all the work done by ANZSI. Full details of the reports and events I highlight are found later in this report. Thank you to Sherrey Quinn for coordination and editing of the report, and to all the ANZSI officials and members whose contributions have been included.

#### COVID-19

The spread of the COVID -19 pandemic brought economic disruption, sickness and death across the world and in Australia. Since March this year, increasing restrictions on movement and necessary lockdowns has proved tough. I know that as indexers we are all used to self-isolating, but it was still hard to be apart from family, friends and colleagues, as well as missing out on the occasional outing and celebration.

Conferences to be held in the first half of the year by international indexing societies were cancelled. ANZSI also had to suspend some of its programs and postpone member events.

Council decided that Accreditation application processing would be temporarily suspended and the John Simkin Medal process would be postponed until 2021. Accreditation remained suspended at 30 June 2020. Council regretted having to make the latter decisions, but felt that it was necessary, given the current pandemic health warnings on handling of items and unnecessary travel.

Similarly, plans for a future ANZSI conference, training workshops and professional development meetings were placed on hold until some certainty as to the end of the COVID-19 restrictions could be ascertained. ANZSI Council has met via the Redback teleconferencing facility for many years now, and all Council meetings were held in this financial year. Perhaps a 'positive' outcome of the world-wide pandemic has been the rise of many cloud-based video-conferencing services offering much cheaper rates than before. Council has taken advantage of this and switched to Zoom for its final meeting in June. It will be a considerable financial saving.

Indexers in Australia who are freelancers and/or run their own business may have been eligible for government support during the COVID-19 epidemic and I hope that this alleviated some financial distress. Anecdotal evidence on the effect of COVID-19 restrictions on the publishing industry has indicated that a number of local and overseas publishers took measures including furloughing staff, salary cuts and 'downsizing' staff and operations, and publications have been delayed.

On behalf of ANZSI, I sent our best wishes to all our international societies and their members around the world during these difficult times. And ANZSI received corresponding messages of support as well.

#### Highlights

##### National Indexing Day 2020

ANZSI National Indexing Day was to have been celebrated on 26 March 2020. A get-together was held by Canberra Region Indexers on 14 March, just before meeting restrictions and lockdown came into force, but a meeting planned in Hobart for 28 March was cancelled. However, NSW Indexers took the opportunity to use Redback, the Council's teleconferencing facility, to host a well-attended teleconference on 'Nuts & Bolts' on 29 March.

### Membership

At 30 June 2020, ANZSI had a total of 99 members. In 2019 there were 108 members. There were 30 ANZSI Accredited indexers.

Life Membership was conferred on Michael Ramsden in November 2019. Council congratulated Michael on this achievement.

### ANZSI recommended rate for indexing

At its July meeting Council resolved to increase the Australian recommended rate for indexing from \$65 per hour to \$70 per hour. The recommended rate is indicative – not binding – and may be used by members as a guide when calculating fees for indexing work.

### Membership fees

Australian membership fees will remain at the present level for 2020–21. In April 2020 Council resolved, after consultation with the Aotearoa / New Zealand group, that the New Zealand individual membership fee be set at 70% of the Australian individual members' rate from 2020–21.

### Website Review Committee

The Website Review Subcommittee has been reviewing, re-organising and updating pages with the assistance of the Web Manager. This is an ongoing project.

### ANZSI Library

This new benefit for members commenced operation in April 2020, but was also suspended temporarily due to COVID-19 health restrictions.

### ANZSI Constitution

A number of amendments were endorsed at the 2018–19 AGM in August 2019. These are outlined in the Secretary's report.

### University of Western Australia Press

In May 2020, on behalf of ANZSI, I wrote to express our support for the continuation of a diverse range of publications by University of Western Australia Press (UWAP). ANZSI was dismayed to hear late last year that UWAP was to be shut down after 85 years, in favour of an open-access, purely digital publication of scholarly works by UWA authors. In light of the hundreds of scholars, writers and readers who have condemned this move, the University commenced a process of consultation. Council's submission was acknowledged and we wait to hear what will be the future form of UWAP.

### Acknowledgements

ANZSI Council held its first meeting of the 44th session of ANZSI on 4 November 2019. At this meeting Council formally welcomed two new Council members, Michael Ramsden and Marnie Hannagan. Michael is well-known to ANZSI members, having previously served on Council and many ANZSI committees. Marnie has specialist expertise as an editor and indexer. This meeting also saw a change in portfolios, with Karen Gillen stepping down as Vice-President/Groups Coordinator and Michael Ramsden agreeing to take on the roles.

Council acknowledged with gratitude the contribution of Michael Wyatt, who stepped down from the Accreditation Committee this year.

Glenda Brown held the position of Education Officer from 1 July 2019 to 2 February 2020. Council is grateful to Glenda for her long-term contribution in this role. Karen Gillen took over the position on 3 February 2020.

Council also acknowledges with gratitude the work of Nikki Davis, Karen Gillen and Jenny Browne in streamlining renewal procedures and membership records.

Late last year, Tracy Harwood accepted the position of ANZSI ICRIS International Liaison. The appointment is for a three-year term. I will continue as the ICRIS representative (ex officio) on the Email List.

Council extends its thanks to all the above Members of Council and Officers of ANZSI for their ongoing contributions in the roles.

My thanks, in particular, go to the Council Executive – Michael Ramsden (Vice-President/Groups Coordinator), Karen Gillen (Treasurer/Education Officer/Library Officer) and Sherrey Quinn (Secretary/Accreditation Chair) – for their unfailing support for me throughout the year.

## REPORTS FROM OFFICE-BEARERS, COMMITTEES AND GROUPS

### Secretary's report

Sherrey Quinn, Secretary

#### Council membership

President	Madeleine Davis
Vice-President	Karen Gillen until 4 November 2019; Michael Ramsden from 4 November 2019
Secretary	Sherrey Quinn
Treasurer	Karen Gillen
Council members	Shirley Campbell, Juliet Richters, Elisabeth Thomas; Marnie Hannagan from 4 November 2019

#### Officials of the Society

Membership Secretary	Nikki Davis
Editor of the <i>ANZSI Newsletter</i>	Elisabeth Thomas
Web Manager	Jenny Browne
Communications Officer	Jenny Browne
Groups Coordinator	Madeleine Davis Acting Groups Coordinator from 30 June to 4 November 2019; Michael Ramsden <i>ex officio</i> from 4 November 2019
Education Officer	Glenda Browne to 2 February 2020; Karen Gillen from 3 February 2020
Accreditation Receiving Officer	Shirley Campbell
ANZSI Indexing Awards Receiving Officer	Shirley Campbell
ICRIS (International Committee of Representatives of Indexing Societies) representatives	ANZSI ICRIS representative: President, <i>ex officio</i> (Madeleine Davis) ANZSI ICRIS international liaison: Tracy Harwood from 4 November 2019
Library Officers	Australia: Karen Gillen; New Zealand: Carol Dawber

#### Chairs of Committees

Accreditation Committee	Sherrey Quinn
ANZSI Indexing Award – John Simkin Medal 2020 Committee	Award process postponed to 2021
Library Committee	Karen Gillen
Website Review Subcommittee	Madeleine Davis

## Group Convenors

Aotearoa/New Zealand Indexers	Daphne Lawless
Canberra Region Indexers	Shirley Campbell
Indexers SA	Jane Oliver
NSW Indexers	Glenda Browne (Acting)

## Council meetings

Council meetings were held by teleconference on 4 November and 2 December 2019, and 3 February, 15 March, 20 April and 1 June 2020. Minutes and documents are on the website:

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

Some matters which required urgent action, such as response to the COVID-19 situation, were resolved via email exchanges. In particular, in March 2020 Council resolved to postpone the ANZSI Indexing Awards and John Simkin medal process until 2021, and to suspend Accreditation assessments until later in 2020 or when infection-prevention protocols allowed.

The ANZSI AGM for 2018–19 was held on 26 August 2019 via teleconference.

## Life Membership

Michael Ramsden was awarded Life Membership of ANZSI in November 2019, prior to him joining Council. A report was published in the *ANZSI Newsletter* vol 15, no 6, December 2019, p. 4–7.

## Review of ANZSI policies

Council has continued its regular review of ANZSI policies. Reviews which were completed and policies which were developed during 2019–20 are:

- Communications Policy
- Library Policy
- Library Officer (Australia) Position Description
- Regulations for Regional Groups
- Regulations for Interest Groups.

The recommended minimum rate for indexing was increased by council on 15 July 2019 from \$65/hour to \$70/hour. This is the first increase in the recommended rate since 2014. The New Zealand rate remains at NZ\$55 per hour at the request of the Aotearoa/New Zealand Group. The recommended rate is indicative – not binding – and may be used by members as a guide when calculating fees for indexing work.

In April 2020 Council resolved, after consultation with the Aotearoa / New Zealand group, that the New Zealand individual membership fee be set at 70% of the Australian individual members' rate from 2020–21.

The most recent edition of all policies and position descriptions are published on the website at:

<http://www.anzsi.org/member-area/official-documents/>

## Constitution

The Constitution was amended with changes endorsed at the 2019 Annual General meeting held on 26 August 2019:

- Section C, Discipline, Disputes and Mediation – reference to the ANZSI Code of Conduct was added

- Section D, Officers of the Society –usage of the words ‘officer’ (the president, vice-president, secretary, and treasurer ‘) and ‘official’ (persons appointed by Council to specific roles) was clarified
- Section E, clause E25 on voting at Council meetings (by show of hands or other indication of intent) was amended for internal consistency with other clauses
- Section F, Council elections provides for a simple election process prior to the AGM if an election for office-bearers is necessary.
- Section I, Finance – removal of reference to branches.

The Constitution is available in the Official Documents area of the website.

## Registers

ANZSI has various registers which record important information to assist in transfer of responsibilities as office-bearers change, and present in a readily-accessible way information which is important to ANZSI’s decision-making and history.

The following registers were compiled in 2019–20:

- ANZSI Awards and Medal Register, a list of Medal judges and award winners for each year in which awards have been held
- Library Catalogue for the Australian and New Zealand collections
- Contact and Corporate Details Register.

Management of the Member Register is reported by the Membership Secretary.

## ANZSI Newsletter indexing project

Work is proceeding gradually as time permits. During the year the following was accomplished:

- The PDF file for the published index was converted to Microsoft Word. A Sky Index masterfile was then created from the Word file by an external expert at modest cost. This reverse engineering was necessary because the original index file for the 1973–92 period is not available to Council.
- The thesaurus has been updated to incorporate subject terms used in the published index and can be used as an authority list if necessary.
- Changes (such as re-phrasing and corrections) which are necessary in the 1973–92 data have been recorded.
- The next available annual index has been reviewed.
- Correspondence with volunteers continued.
- Sections (years) will be published as they are completed and reviewed.



## Treasurer's report

*Karen Gillen, Treasurer*

### Accounting

Following a successful trial period, the Society subscribed to Xero accounting software as a client of Karla Eldridge & Associates, our auditor. Under this arrangement, the auditor has direct access to our data and bank statements. The software provides a secure and ongoing record of the Society's finances, and has resulted in greater accuracy and efficiencies in record keeping, report production, and budget development.

### Investment performance

The Society invests a proportion of its assets in a bank term deposit. The steady decline in interest rates over the financial year resulted in greatly reduced income from interest earned compared to previous years. However, although returns were low, this was partially offset by having doubled the amount we had previously invested, from \$30,000 in 2018–19 to \$60,000 in 2019–20.

### Windfalls

#### Copyright Agency payment

The Copyright Agency alerted the Society to funds owed to us in relation to the *ANZSI Newsletter*. After submitting a formal claim, we received a payment of \$805.58

#### Commonwealth Bank refund

The Society was issued with a refund of \$320.73 from the Commonwealth Bank arising from their overcharging the then NSW branch of the Society for merchant fees between November 2008 and June 2009. The bank posted the cheque to the home address of the person who had been the NSW Branch Treasurer at that time, who has also not been an ANZSI member since 2013. We are very grateful to them for forwarding the cheque to us.

#### Westpac COVID-19 support package

As part of their COVID-19 support package, our current bank has credited us back 50% of the merchant fees we have paid over the last quarter of 2019–20.

### Financial performance and notes to financial statements

The Society achieved a net profit of \$65.69 during the 2019–20 financial year (see Profit and Loss Statement below). Significantly, no special events, such as training, symposia or conferences, were held during 2019-20, and no costs or income from training held in the previous year were carried over into this year's profit and loss figures.

Revenue was generated primarily from the Society's regular sources of income—i.e., investments, membership subscriptions and fees for Indexers Available. However, it was boosted by the one-off windfalls mentions above.

In addition to regular operating costs, expenditure was increased by (a) greater than usual payments to ANZSI Officers (arising from the carrying over of unrepresented invoices from the previous year, and an ex gratia payment to the Webmaster for services above and beyond their remit); and (b) the need to pay double the usual annual cost of auditing (with both the 2017–18 and 2018–19 financial records audited in the one year).

At 30 June 2020, the Society's balance sheet recorded assets of \$112,818.71 (see Balance Sheet), an increase of \$65.69 from the previous financial year (see Financial Report).

# Profit and Loss

## Australian and New Zealand Society of Indexers (ANZSI) For the year ended 30 June 2020

2020

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### Trading Income

Accreditation Fees	90.00
Bank & Investment Interest Income	601.24
Indexers Available Fees	1,715.00
Indexers Available NZ	249.63
Membership Fees	7,957.54
Membership Fees NZ	968.81
NZ Currency Conversion Adjustment	(27.07)
Publications	805.58
<b>Total Trading Income</b>	<b>12,360.73</b>

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### Gross Profit

12,360.73

### Operating Expenses

Accreditation costs	36.05
Consulting & Accounting	1,759.20
Email	535.04
Equipment	59.95
Insurance	684.00
Library Costs	214.73
Merchant Fees	273.10
Postage	283.05
Regional Group Costs	374.38
Special projects	140.28
Subcontractors - ANZSI officials	5,250.00
Teleconferencing	1,166.36
Website Costs	1,518.90
<b>Total Operating Expenses</b>	<b>12,295.04</b>

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### Net Profit

65.69

# Balance Sheet

Australian and New Zealand Society of Indexers (ANZSI)

As at 30 June 2020

30 JUN 2020

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## Assets

### Bank

ANZSI - Chq Account #791	47,802.20
ANZSI - Comm Solutions #350	432.34
ME Business Term Deposit	60,541.02
Paypal - ANZSI	2,377.95
<b>Total Bank</b>	<b>111,153.51</b>

### Current Assets

ANZSI New Zealand Account	1,665.20
<b>Total Current Assets</b>	<b>1,665.20</b>

### Total Assets

**112,818.71**

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## Net Assets

**112,818.71**

## Equity

Current Year Earnings	65.69
Retained Earnings	112,753.02
<b>Total Equity</b>	<b>112,818.71</b>



**Australian and New Zealand Society of Indexers Inc.**

GPO Box 2069 Canberra ACT 2601

Website: <http://www.anzsi.org>

ABN 36 610 719 006

**FINANCIAL REPORT for 1 July 2019 to 30 June 2020**

**CASH INFLOWS**

Jul 2018 - Jun 2019	ITEM	Jul 2019 - Jun 2020
\$90.00	Accreditation Fees	\$90.00
\$1,049.33	Bank and Investment Interests	\$601.24
\$1,688.30	Indexers Available Fees (Inc NZ)	\$1,964.63
\$7,652.08	Membership Fees (Inc NZ)	\$8,926.35
\$75.00	Publications / Newsletter	\$805.58
\$0.00	Sundries	\$0.00
\$8,200.00	Training	\$0.00
<b>\$18,754.71</b>	<b>TOTAL</b>	<b>\$12,387.80</b>
	Transfers from other accounts	

**CASH OUTFLOWS**

Jul 2018 - Jun 2019	ITEM	Jul 2019 - Jun 2020
\$0.00	Accreditation Costs	\$36.05
\$1,554.80	Accounting / Auditor / Consulting / Insurance	\$2,443.20
\$329.10	Advertising / Gifts / Promotion / Publicity	\$0.00
\$711.46	Bank Fees / Merchant Fees	\$273.10
\$446.39	Email	\$535.04
\$0.00	Equipment	\$59.95
\$1,356.55	ICRIS Costs	\$0.00
\$587.70	Library Costs / Printing / Postage and Stationery	\$497.78
\$345.40	Regional Group Costs	\$374.38
\$0.00	Special Projects	\$140.28
\$4,250.00	Subcontractors ANZSI Officers	\$5,250.00
\$2,520.01	Subcontractors External	\$0.00
\$1,162.37	Teleconferencing	\$1,166.36
\$4,813.14	Training	\$0.00
\$1,228.76	Website Costs	\$1,518.90
<b>\$19,305.68</b>	<b>TOTAL</b>	<b>\$12,295.04</b>
	Transfers from other accounts	

**NET CASH FLOW for the period** **\$92.76**

**ASSETS NZ Currency Conversion** **(\$27.07)**

30-Jun-19	ITEM	30-Jun-20
\$110,629.34	Westpac Cheque Account	\$47,802.20
\$913.55	Westpac Community Solutions Account/Credit Card/Paypal	\$2,810.29
\$0.00	Term Deposit - ME Bank	\$60,541.02
\$1,162.35	Cash at Bank (New Zealand Account)	\$1,665.20
<b>\$112,705.24</b>	<b>TOTAL</b>	<b>\$112,818.71</b>

## **INDEPENDENT AUDITOR'S REPORT TO THE MEMBERS OF AUSTRALIAN AND NEW ZEALAND SOCIETY OF INDEXERS**

### **Scope**

I certify that I have audited the attached financial statements of Australian and New Zealand Society of Indexers for the period ended 30 June 2020, consisting Statement of Net Cash Flow, statement of financial position and notes to and forming part of the financial accounts.

The Association's Committee of Management is responsible for the financial statements and have determined that the accounting policies used are appropriate to meet the requirements of the Members. I have conducted an independent audit of these financial statements in order to express an opinion to the members of the society.

The financial report has been prepared for the distribution to members for the purpose of fulfilling the Committee's financial reporting requirements under its constitution. I disclaim any assumption of responsibility for any reliance on this report or on the financial report to which it relates to any person other than a member, or for any purpose other than that for which it was prepared.

My audit has been conducted in accordance with Australian Auditing Standards to provide reasonable assurance as to whether the financial statements are free of material misstatement. My procedures included examination, on a test basis, of evidence supporting the amounts and other disclosures on the financial statements. These procedures have been undertaken to form an opinion as to whether, in all material respects, the financial statements, are presently fairly in accordance with applicable Australian Accounting Standards and other mandatory professional reporting requirements, so as to present a view which is consistent without understanding of the Association's financial position and the results of its operations.

### **Audit Opinion**

The audit opinion expressed has been formed on the above basis.

## **NOTES TO AND FORMING PART OF THE FINANCIAL STATEMENT FOR THE PERIOD ENDED 30 JUNE 2020**

### **1. BASIS OF ACCOUNTS PREPARATION**

The financial statements of Australian and New Zealand Society of Indexers have been prepared in accordance with applicable Accounting Standards, other mandatory professional reporting requirements and the applicable disclosure requirements of the Association's Incorporation Act. The accounts have also been prepared in the basis of historical costs and do not take into account changing money values or, except where stated, current valuations of non-current assets. The accounting policies have been consistently applied, unless otherwise stated.

**a) Plant and Equipment**

Plant and Equipment is included at historical cost and has been expensed through the income and expenditure statement. Depreciation has not been calculated, as the accounts have been prepared using Cash Basis of Accounting and not the Accrual method of Accounting.

**b) Balance Date**

The current accounts for the 12-month period ended 30 June 2020.

**c) Income Tax**

The Association is exempt from the tax under the Income Tax Assessment Act. An income tax liability would only be expected to arise in the future if the Association operated outside the guidelines acceptable to the Commissioner of Taxation or where the organization changes it's not for profit status.

## INDEPENDENT AUDITOR'S REPORT TO THE MEMBERS OF AUSTRALIAN AND NEW ZEALAND SOCIETY OF INDEXERS

In my opinion, the financial statements of Australian and New Zealand Society of Indexers are drawn up:

- a) so as to give a true and fair view of the state of affairs of the Association as at 30 June 2020 and of the results of its operations for the period ended 30 June 2020.
- b) in accordance with applicable Accounting Standards; and
- c) in accordance with the provisions of the Association Incorporation Act.

  
\_\_\_\_\_  
Signature of Auditor

24/07/2020  
Date

• Name of Auditor:	<b>Karla Lee Eldridge</b>
Professional	<b>B.Bus MIPA 216588</b>
Membership: Firm:	<b>KARLA ELDRIDGE AND ASSOCIATES PTY LTD</b>
• Address:	<b>4/458 Middleborough Road Blackburn Vic 3130 (03)</b>
Phone:	<b>9898 3800</b>

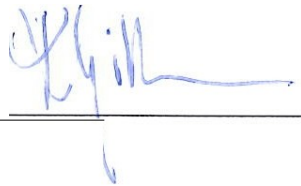
## STATEMENT BY THE COMMITTEE OF AUSTRALIAN AND NEW ZEALAND SOCIETY OF INDEXERS

In the opinion of the members of the committee:

- a) the accompanying profit and loss statement is drawn up so as to give a true and fair view of the result of the Association for the year ended 30 June 2020;
- b) the accompanying Statement of Assets is drawn up so as to give a true and fair view of the state of affairs of the Association as at 30 June 2020; and
- c) at the date of this statement there are reasonable grounds to believe that the Association will be able to pay its debt as and when they fall due.

The accounts of the Association have been made out in accordance with applicable Accounting Standards.

Signed in accordance with a Resolution of the Committee.



Karen Gillen

Treasurer

MELBOURNE

10 / 8 / 2020



Sherrey Quinn

Secretary

CANBERRA

10 / 8 / 2020



## Membership Secretary's report

*Nikki Davis, Membership Secretary*

### Membership fees

The Society uses a single subscription period covering the financial year (i.e. 1 July – 30 June), with subscriptions falling due on 1 July of each year and payable in advance. A pro rata fee applies to those joining after July. Existing members are given a three-month period of grace from 1 July within which to renew their subscriptions. In accordance with the Constitution those who have not renewed by 30 September are deemed to no longer be members.

**Table 1. Subscription fee structure, 1 July 2019 to 30 June 2020**

	Individual membership	Institutional membership
Australian members	AU\$90	AU\$115
New Zealand members	NZ\$80	NZ\$115

### Membership statistics

#### Total membership

At 30 June 2020, ANZSI had a total of 99 members. In 2019 there were 108 members.

Life Membership was conferred on Michael Ramsden in November 2019.

**Table 2. Breakdown of 2019–2020 membership by location and type**

Location	Life members	Institutional members	Personal members	Total membership
ACT	2	2	8	12
NSW	2	0	25	27
NT	0	0	0	0
NZ	0	0	11	11
QLD	0	0	9	9
SA	0	0	6	6
TAS	0	0	4	4
VIC	2	1	23	26
WA	0	0	3	3
OVERSEAS	0	0	1	1
<b>TOTALS</b>	<b>6</b>	<b>3</b>	<b>90</b>	<b>99</b>

### Comparison of 2020 and 2019 statistics

There were 9 losses in membership for the 2019–2020 period.

**Table 3. Comparison of membership figures in 2019 and 2020**

Location	Membership at 30 June 2019	Membership at 30 June 2020	Gains	Losses
ACT	14	12	–	2
NSW	30	27	–	3
NT	0	0	–	–
NZ	11	11	–	–
QLD	11	9	–	2
SA	6	6	–	–
TAS	2	4	2	–
VIC	30	26	–	4
WA	3	3	–	–
OVERSEAS	1	1	–	–
<b>TOTALS</b>	<b>108</b>	<b>99</b>	<b>2</b>	<b>11</b>

### Accredited Indexers

Accredited indexers may only claim this status as long as they are financial members of ANZSI. At 30 June 2020 there were 30 accredited indexers.

**Table 4. Accredited indexers at 30 June 2020**

Location	Accredited indexers
ACT	5
NSW	11
NT	0
NZ	4
QLD	0
SA	0
TAS	2
VIC	8
WA	0
OVERSEAS	0
<b>TOTALS</b>	<b>30</b>

## Member 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)*.

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

During the 2019–2020 financial year there were no formal requests for access to the Member Register.

## 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 2020. A one-month period of grace applies, after which entries for members who have not paid are deleted from the directory.

**Table 5. Indexers Available Annual Advertising Fees, 1 July 2019 to 30 June 2020**

Australian members	A\$35
New Zealand members	NZ\$35

### Indexers Available statistics

At 30 June 2020 there were 52 members with an Indexers Available listing. This is 4 more than for the 2018–2019 period.

**Table 6. Members listed on Indexers Available at 30 June 2020**

LOCATION	TOTAL SUBSCRIBERS
ACT	6
NSW	18
NT	0
NZ	7
QLD	4
SA	1
TAS	2
VIC	12
WA	2
OVERSEAS	0
<b>TOTALS</b>	<b>52</b>

## Newsletter Editor's report

*Elisabeth Thomas, Editor*

The *ANZSI Newsletter* appeared at its now usual two-monthly intervals in August, October and December 2019 and February, April and June 2020. Each issue was well received, judging by the click and open rates.

Amidst the reports on news, software, indexing issues such as proofreading, government documents and the 'Washington read', we reintroduced a People section for members to learn about other members and reported on the few local group gatherings and international events that were held before COVID-19 changed everything.

Members are always encouraged to submit content to the *ANZSI Newsletter* and contribute to their newsletter, sharing knowledge with the rest of the Society.

Thanks go to all the contributors, both regular and occasional, as well as Tanya Edbrooke and Jenny Browne for their invaluable assistance in getting the *ANZSI Newsletter* out.

## Webmaster and Communications Officer's report

*Jenny Browne, Webmaster and Communications Officer*

The main tasks for the Web Manager over the last 12 months related to glitches and content changes on the [anzsi.org](http://anzsi.org) site

The main glitches were 503/504 errors occurring when trying to access the Members Area and Indexers Available pages. After corresponding with numerous providers—including Dreamhost, WordPress forums, plugin authors, and WPFixit—Webgrow was consulted. They changed a user setting and advised how to change the formatting of social media info on the site to fix these issues.

There is an on-going revamp of the site to which the Webmaster contributes. During the report year this primarily involved making changes to the About Indexing, Publications, and Members Area sections; changing permissions for certain pages; and adding links to the new ANZSI Library page.

The website had 222,824 visits in the last year. The most popular search was again 'constitution'.

The Communications Officer role continued as normal. The new ANZSI Library email address was added to the Dreamhost [anzsi.org](http://anzsi.org) mail system. The highest open rate (80% and over) for MailChimp messages belonged to emails regarding certain newsletters; and membership renewal.

Jenny will be continuing as Communications Officer, but stepping down from the Web Manager role due to time constraints. She acknowledges that it has been an enjoyable and informative time, and thanks everyone who assisted.

## Education Officer's report

*Karen Gillen, Education Officer*

Glenda Brown held the position of Education Officer from 1 July 2019 to 2 February 2020. Karen Gillen stepped into the role on 3 February 2020.

### Training

No training was held in the latter half of 2019, however, a number of inquiries regarding training were received, and responded to, during that period. By early 2020, there was sufficient interest to warrant holding an introduction to back-of-book indexing training course. Preliminary planning to

hold a course in Melbourne was underway when COVID-19 restrictions were implemented in mid-March 2020. Preliminary planning had also been underway for the running of a series of training workshops, including an advanced indexing course, at a future Conference proposed for late 2021 or early 2022. However, given the ongoing uncertainty surrounding the future impact of COVID-19, all plans for running face-to-face training workshops remained on hold at the end of June 2020.

### **Education Officer Position Description**

A review of the Education Officer's Position Description was undertaken in May 2020. The review revealed the need to rethink the role and duties of the Education Officer in the light of changes to the size and structure of the Society, as well as broader societal changes. As the reporting period drew to a close, a new position description, which takes account of these changes and includes a more proactive role for the Education Officer, was in the process of being drafted.

### **Policy development**

The review of the Education Officer's Position Description also highlighted the need to develop a Policy on Training and a Policy on Professional Development to ensure the continued provision of training, professional development, and networking opportunities for all members of the Society. As the reporting period drew to a close, these policies were in the process of being drafted.

### **Professional Development Program**

Indexers NSW presented an indexing nuts-and-bolts Q&A teleconference meeting on 29 March 2020. Initiated by the NSW Group as a National Indexing Day 2020 event, this professional development session attracted 13 members from ACT, NSW, Victoria and WA.

A key feature of the draft professional development policy, and a new responsibility of the Education Officer, is the development and implementation of an annual professional development program which includes activities and events that are available to all members of the Society. In June 2020, the first event of the 2020–21 professional development program—a Biography Indexing Q&A to be held in late July 2020 via the teleconference platform Zoom—was planned, organised and promoted.

### **Accreditation Committee report**

*Chair: Sherrey Quinn. Receiving Officer – Accreditation: Shirley Campbell.*

Accreditation Committee members are Sherrey Quinn (Chair), Madeleine Davis, Tordis Flath, Karen Gillen, Jean Norman and Shirley Campbell (Receiving Officer). Trevor Matthews was coopted to the panel of assessors for one assessment. The committee conducted its discussions mainly by email and telephone during 2019–20. The Chair and Receiving Officer met occasionally to review progress.

Three applications were completed in 2019–20. One member, Christopher Brennan, achieved accreditation.

The Accreditation process involves repeated handling and posting of packages, because an index cannot be assessed without reference to its book, and most members submit print books for assessment. In March 2020 in response to the COVID-19 pandemic all Australian states and territories and New Zealand implemented social isolation and infection-prevention protocols. In March 2020 ANZSI Council temporarily suspended Accreditation application processing, this decision being made because ANZSI as an entity has a responsibility not to put its members and volunteers in harm's way. Accreditation remained suspended at 30 June 2020.

The Accreditation application fee is A\$90 and NZ\$90.

## ANZSI Library report

*ANZSI Library Committee: Karen Gillen, Library Officer (Australia); Carol Dawber, Library Officer (New Zealand); Sherrey Quinn (custodian of collection held in Canberra)*

### Establishment

In late 2019, Council decided to combine the library collections, previously held by some of the former branches, to create the ANZSI Library. The aim was to provide a comprehensive collection of resources on indexing, free of charge, for all ANZSI members.

### Collections

The library comprises two collections: the Australian collection; and the New Zealand collection. The catalogues for both collections are located on the ANZSI Library webpage in the member's area of the ANZSI website. The catalogue for the New Zealand collection may also be accessed from the Aotearoa/New Zealand Indexers webpage. Items forming the Australian collection are held in Melbourne and Canberra. ANZSI members may borrow from the collection held in their country of residence.

### Operation and management

The operation of the library is guided by the ANZSI Library policy, and is managed by the Library Committee. Each of the collections is managed separately by a Library Officer.

Since the dissolution of the branches, the New Zealand collection has been operating as the library of the Aotearoa/New Zealand Indexers group. With the establishment of the ANZSI Library, all operating costs for the New Zealand collection are now deemed ANZSI Library expenses rather than group expenses.

### Acquisitions

Following the establishment of the library, two copies of the fourth edition of Hazel Bell's *Indexing Biographies* (University of Liverpool Press, 2020) were purchased for the library: one for each collection. Jon Jermy and Glenda Browne's book on website indexing was also added to the catalogue as a free download.

### Loans

Unfortunately, the commencement of operations of the library coincided with the introduction of restrictions on movement aimed at reducing the spread of COVID-19. As a result, hard copy items were not available for loan from the Australian collection during this period. However, members were able to have their names added to waiting lists for any items they wished to borrow as soon as they were available. During this period, protocols were developed for the safe handling of books in the Australian collection. Victoria, where the bulk of the Australian collection is held, experienced a more extended period of restrictions than other Australian states. In mid-June 2020, once restrictions were eased in Victoria, items from the Australian collection were made available for loan.

## Awards Committee report

*Shirley Campbell, Receiving Officer.*

The John Simkin Medal is offered biennially and was due to be offered in 2020. A panel of judges was selected but did not convene before Council postponed the awards process from 2020 to 2021, due to the COVID-19 outbreak and infection prevention protocols.

## Website Review Subcommittee report

*Chair: Madeleine Davis; Members: Karen Gillen, Sherrey Quinn*

The members of the subcommittee each have substantial voluntary commitments in addition to their work on this committee. Nevertheless, over the past financial year, progress has been made on all aspects of their wide-ranging brief.

### Review of website content

The content of many pages has been updated or completely revamped, inconsistencies in style and presentation have been addressed, and broken links have been restored.

### Monitoring and maintenance of website content

Specific ANZSI Officers and Officials have been allocated responsibility for the monitoring and maintenance of the content on web pages that relate to their specific duties. For example, the Secretary is responsible for the Official Documents pages and the Council-only page, the Treasurer is responsible for the ANZSI Store, the Membership Secretary is responsible for maintaining the 'Join Us' page, the Australian Library Officer is responsible for the ANZSI Library page, etc.

### Structural changes to the website

Following Council decisions regarding the embargo on the Newsletter and the establishment of the ANZSI Library, a number of significant changes were made to the structure and content of the website. In addition to the inclusion of some new material, the structural changes focused on delineating between public and member-only content. As a result, the benefits of membership are more clearly distinguishable to members, and the less cluttered public website will be more easily navigated by non-members. In the process of implementing these structural changes, content was updated and refined, redundant material was removed, and the Members area landing page was redesigned.

### Management of website

As the reporting period drew to a close, the primary focus of the committee was on finding a suitable commercial company to take over management, and perhaps also the hosting, of the ANZSI website. To this end, committee members were engaged in carrying out the following tasks: assessment of current and future website management and hosting needs; development of a set of specifications for management and hosting of the ANZSI website; development of a short-list of companies from whom to seek quotes; and development of a set of criteria to assess quotes received.

## National Indexing Day 2020

This year's National Indexing Day was 26 March 2020. Celebration was low-key due to the COVID-19 situation, with a focus on ANZSI group initiatives.

**Aotearoa/New Zealand Indexers Group.** The COVID-19 lockdown in New Zealand prevented any meetings to celebrate the event.

**Canberra Region Indexers.** On 14 March 2020, just a week ahead of COVID-19 lockdown measures coming into force in Australia, five indexers met for lunch to acknowledge National Indexing Day and to share their latest indexing news..

**Indexers SA.** Due to COVID-19, the group did not hold any events to mark the occasion.

**NSW Indexers.** On Sunday 29 March 2020 NSW Indexers hosted an online indexing nuts-and-bolts Q&A session using the Redback teleconferencing system. Thirteen members participated: 6 from NSW, 3 from ACT, 2 from Victoria, and 1 from Western Australia. Feedback about the meeting was overwhelmingly positive, and a report was published in the ANZSI Newsletter vol 16, no 2, April 2020, p. 14–17.

## ANZSI Groups Coordinator's report

*Michael Ramsden, Vice-President and Groups Coordinator*

It has been a quiet year, especially in 2020. Owing to the impact of the COVID-19 virus and the difficulty of holding face-to-face meetings during the resulting lockdown and subsequent restrictions on numbers attending meetings, there has been less activity than usual.

The Report of the Restructure Committee envisaged the possibility of interest groups as well as those geographically based. The Society, however, has no currently active interest group.

No progress was made on the question of the tenure of group coordinators and this will be pursued in 2020–21.

### Groups active during 2019–2020

#### Regional Groups

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

### Reports from groups

#### Aotearoa/New Zealand Indexers Group

*Daphne Lawless, Convenor*

Membership of the group stands steady at 15. We usually try to have a meeting in Wellington early in the year and/or around National Indexing Day but this year the COVID-19 situation meant that this did not happen. The group is still enjoying *The Indexer* subscription and use of the New Zealand library.

#### Canberra Region Indexers

- Shirley Campbell, Convenor

Membership of the group remained at 14 this year with members coming from the ACT as well as surrounding areas in NSW. There were four activities for the group during the year.

Twelve members met on Thursday 1 August 2019 to hear a presentation by Mary Russell and Max McMaster – a statistical analysis of annual report index layout and presentation, for some 175 Commonwealth annual reports for 2016–17. The audience was a mix of very experienced annual report indexers and editors, and those newer to indexing. There was lively discussion during and after the presentation, both about the data and findings and about annual reports more generally, as annual report indexes are navigation aids important for government accountability and transparency. After the session, the group had a convivial lunch together.



On 16 September 2019 an informal gathering was held at Bookplate at the National Library to meet with the President, Madeleine Davis, when she was visiting Canberra.

Six indexers met on 5 December 2019 for lunch at the Bushranger Hotel in Collector, a small village on the Federal Highway in New South Wales, halfway between Goulburn and the Australian Capital Territory. As well as enjoying the opportunity to network, the main topics of discussion were annual report indexing and future seminars/conferences which could be offered by ANZSI for its members.

The survey of members undertaken in 2019 indicated there was a need for training sessions for indexers ranging from beginning to experienced indexers. There was a most constructive conversation on what form short training sessions could take – perhaps a Workshop Weekend – as well as discussing what a future national meeting could look like – perhaps a day(s) before/after an IPEd conference. These suggestions were forwarded to Council for consideration.

On 14 March 2020, just a week ahead of COVID-19 lockdown measures coming into force in Australia, five indexers met for lunch to acknowledge National Indexing Day and to share their latest indexing news. The group welcomed a visitor who had contacted Glenda Browne last year enquiring about possible training courses in indexing.

#### Indexers SA

- Jane Oliver, Convenor

Indexers SA held an enjoyable social gathering at the Est Ovest Restaurant in Adelaide on 15 November 2019 to catch up on individual indexing activities.

Due to COVID-19, we have been keeping in touch by email since, as we have not been able to meet face-to-face.

A meeting to discuss the Indexers SA's project to index the archives and other material at Adelaide Zoo was also postponed because of COVID-19.

The group will plan more activities when restrictions are lifted.

#### NSW Indexers

- Glenda Browne, Acting Convenor

There are currently nineteen members of the NSW Indexers Group (using twenty email addresses). The group uses a Google Groups mailing list to share information and to organise events. An invitation for people from NSW and other areas to join the group was published in the October 2019 ANZSI newsletter. One new member joined in the last financial year. Not all ANZSI members living in NSW are members of the group.

ANZSI NSW Indexers hosted a presentation by Frances Lennie on Cindex version 4 on Saturday 14 September at the Sydney Mechanics School of Arts, Sydney.

The ANZSI President organised two webinars with Katharina Munk at times suitable for Australasians on basic and advanced features of the embedded indexing software package Index Manager.

For National Indexing Day 2020, on Sunday 29 March 2020 NSW Indexers hosted an online nuts-and-bolts Q&A session using the Redback teleconferencing system. Thirteen people participated, including six ANZSI NSW members. Feedback about the meeting was overwhelmingly positive, and a report was written for Council on the preparations and the event.

NSW group member Glenda Browne represented ANZSI at the Australian Inclusive Publishing Initiative (AIPI) Forum held on 1 November 2019. The group created a strategy map for 2019–2023; training for professional organisations is one of the priorities.

## International activities

### International Committee of Representatives of Indexing Societies report

*Report compiled by Madeleine Davis*

On 4 November 2019 Tracy Harwood was appointed as ANZSI ICRIS international liaison. Madeleine Davis continued as the ICRIS representative (ex officio) on the Email List

Minutes of the ICRIS meeting of 8 September 2019, at the Society of Indexers (SI) Conference at Queen Mary University, were tabled at the 2 November 2019 ANZSI Council meeting. This ICRIS meeting resolved some changes to the 'ICRIS Terms of Reference, Revised version as agreed in Shanghai, October 2018', principally to remove 'Schedule A, List of mailing list members'. Council noted the changes in November 2019 and formally endorsed them on 3 February 2020.

President Madeleine Davis was confirmed as the official ANZSI ICRIS representative at the Indexing Society of Canada / Société canadienne d'indexation (ISC/SCI) conference planned for St. John's, Newfoundland June 2020. Due to COVID-19 the conference was cancelled, with tentative plans to hold it in 2021.

Conferences to be held by the SI, the American Society for Indexing (ASI), and ISC/SCI in the first half of 2020 were also cancelled, although ASI held a virtual conference on 2 May 2020. SI celebrated its National Indexing Day via Twitter.

ANZSI and affiliated societies exchanged messages of support and well-wishing during the COVID-19 situation.

*The Indexer*, edited by Mary Coe, continued to be published this year in spite of COVID-19.

**End of ANZSI Annual Report for 2019–20**