



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  
2020–21

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## **PRESIDENT'S REPORT FOR 2020–21**

*Madeleine Davis, President*

### **Introduction**

This President's report for 2020–21 summaries the verbal report made at the ANZSI AGM for 2020–21, held by Zoom videoconference on 19 August 2021. Nineteen members participated in the AGM.

Business of the AGM included the acceptance of the Minutes of the 2019–20 AGM, the President's annual review of the year 2020–21 (this report), the Treasurer's report for 2020–21 (included below) and election of Council members.

Single nominations for the following council positions were received therefore no voting was necessary, and the nominees were declared elected unopposed.

Council members for 2021–22 are:

President: Madeleine Davis

Secretary: Sherrey Quinn

Members: Shirley Campbell, Tanya Edbrooke, Marnie Hannagan, Juliet Richters, Elisabeth Thomas.

No nominations were received for the offices of Vice President or Treasurer. Council will continue to seek nominations for these roles and welcomes members who would like to contribute to ANZSI by joining Council. If you are interested, please contact Madeleine Davis, President: [president@anzsi.org](mailto:president@anzsi.org)

Highlights of 2020–21 are presented here, and detailed reports from ANZSI officer and committees follow.

### **Highlights of 2020–21**

#### **COVID-19**

As the COVID-19 situation in Australia and its resulting lockdowns and restrictions on face-to-face meetings and safe handling of postal items seemed to be improving towards the end of 2020, Council agreed that the John Simkin Medal, Accreditation and borrowing from the Library would go ahead in 2021.

Taking advantage of the relaxation on restrictions, Canberra Region Indexers, NSW Indexers and Indexers South Australia held social gatherings/informal meetings.

However, due to the outbreak of the Delta Variant of COVID-19 in March 2021, New South Wales has seen restrictions enforced again, followed by Victoria and Queensland.

#### **Membership**

At 30 June 2021, ANZSI had a total of 97 members, of whom 29 were Accredited Members. There were 54 members with an Indexers Available listing.

#### **ANZSI recommended rate for indexing**

Both recommended rates for Australian and New Zealand indexers remained at the same level as last year

### Membership fees

Membership fees remained at the same level as last year.

### Website Review Subcommittee

With the discontinuation of the Web Manager position, Council moved to hire an external website management company, WebGrow, to manage the technical aspects of the website, mail servers, WordPress software and security.

### ANZSI Library

After suspension of its activities due to COVID-19 restrictions last year, the ANZSI Library recommenced operations on 23 October 2020.

### Professional Development Program

A successful professional development program was undertaken with Zoom video sessions on *Biography Indexing* (26 July 2020) and *Business Tips: Quoting* (10 November 2020). Details are presented in the Educations Officer's report below. Subsequently, several papers arising from the sessions were published in the *Newsletter*.

### John Simkin Medal

Council had postponed the awards process in 2020 until 2021, due to the COVID-19 outbreak and infection prevention protocols. A call for nominations for the 2021 awards was placed in the February *ANZSI Newsletter* and members notified, with a closing date of 30 June. It is pleasing that 10 nominations have been received.

### Accreditation

After the hiatus during COVID-19 restrictions, Accreditation reopened on 1 January 2021. Eligible members were invited to consult the website Accreditation pages and submit applications.

The Accreditation application fee, last updated in 2016, was increased by a modest \$5 to A\$95/NZ\$95, covering increased postage and administrative costs.

### National Indexing Day 2021

No event was held to coincide with National Indexing Day 2021. Council continues to mark this day on the last Thursday of March every year.

### International activities

#### ICRIS

Both the 2021 triennial conference and ICRIS triennial meeting due to be held concurrently were postponed, due to world-wide COVID-19 restrictions, until October 2022, still hopefully to be held in Berlin.

An informal ICRIS meeting was held via Zoom on 7 April 2021, with representatives of all affiliated indexing societies participating

#### NISO

As reported in the December 2020 ANZSI Newsletter, the National Information Standards Organization (NISO) (US) began a project in August 2019 to develop a standard for criteria for indexes and related information retrieval devices. Council collected comments on the draft

from ANZSI members and forwarded these to the Z39.4 Committee Co-chairs. Council thanked Glenda Browne, Michael Ramsden and Sherrey Quinn for their contributions.

### Acknowledgements

ANZSI Council held its first meeting of the 45th session of ANZSI on 23 August 2020. All Council members from the previous session were formally welcomed back.

The year saw a change in portfolios, with Karen Gillen stepping down from Council as Treasurer and Education Officer. Karen has filled these roles with energy and distinction. While ANZSI is in the process of recruiting a new Treasurer, Karen kindly agreed to undertake the duties until a new appointment is made. Karen is continuing as a member of the Website Review Subcommittee and as Library Officer.

With Karen Gillen stepping down from Council, we welcomed Tanya Edbrooke, who was appointed to fill the casual vacancy as a Council member for the remainder of the 2020–21 term. Council noted with regret Michael Ramsden's decision to not seek re-election and to step down from Council at the end of his 2020–21. Michael had served as Vice-President and Groups Coordinator with great wisdom and experience and continues to hold Life Membership with ANZSI.

Tracy Harwood remained as ANZSI ICRIS International Liaison and Madeleine Davis continued as the ICRIS representative (ex officio) on the ICRIS Email List.

Council also acknowledged with gratitude the work of Nikki Davis, Karen Gillen and Jenny Browne in again maintaining renewal procedures and membership records and to Shirley Campbell for administration and support of the John Simkin Medal and Accreditation processes.

Thanks are also extended to Elisabeth Thomas for her unflagging editorship of the ANZSI Newsletter throughout the year.

Long-term ANZSI members who resigned/retired this year include Clodagh Jones, Linda McNamara, Michael Steemson and Geraldine Triffitt. Council is very grateful for their contributions over the long years of their memberships.

Council also noted the sad loss of Alan Eddy, Carolyn Kearney and Jenny Restarick, all long-term members of ANZSI.

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

## ADMINISTRATION

### Secretary's report

*Sherrey Quinn, Secretary*

### Council membership

President	Madeleine Davis
Vice-President	Michael Ramsden
Secretary	Sherrey Quinn
Treasurer	Karen Gillen until 21 March 2021; vacant but Karen acting until 30 June
Council members	Shirley Campbell, Marnie Hannagan, Juliet Richters, Elisabeth Thomas, Tanya Edbrooke (from April 2021)

### Officials of the Society

Membership Secretary	Nikki Davis
Editor of the <i>ANZSI Newsletter</i>	Elisabeth Thomas
Communications Officer	Jenny Browne
Groups Coordinator	Michael Ramsden
Education Officer	Karen Gillen until 21 March 2021
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
Library Officers	Australia: Karen Gillen; New Zealand: Carol Dawber

### Committees and special volunteers

Accreditation Committee	Sherrey Quinn (Chair), Madeleine Davis, Tordis Flath, Karen Gillen, Jean Norman and Shirley Campbell (Receiving Officer)
ANZSI Indexing Award – John Simkin Medal 2021 Committee	Glenda Browne, Joanne Mullins, Jean Norman
Library Committee (custodians of the distributed collections)	Karen Gillen (Melbourne, Victoria); Carol Dawber (New Zealand); Sherrey Quinn (Canberra, ACT)
Website Review Subcommittee	Madeleine Davis (Chair), Karen Gillen, Sherrey Quinn
Facebook page manager	Glenda Browne

Australian Inclusive Publishing Initiative	ANZSI representative: Glenda Browne
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### 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 12 July 2020 (final meeting of the 2019–20 Council), 23 August, 1 November and 7 December 2020, and 1 February, 22 March, 3 May and 14 June 2021. Minutes and documents are on the website:

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

Reports on each Council meeting were published in the ‘Council Update’ section of each issue of the newsletter.

The ANZSI AGM for 2019–20 was held on 10 August 2020 via videoconference.

### ANZSI policies and fees

The Communications Officer Position Description was reviewed and updated during 2020–21.

The recommended minimum rate for indexing remained at Aus\$70/hour for Australian indexers and NZ\$55 per hour for NZ indexers. The lower NZ rate is at the request of 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.

The Accreditation application fee, last updated in 2016, was increased in June 2021 by a modest \$5 to \$95 (Aus\$ and NZ\$), covering increased postage and administrative costs.

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 proposed by Council and endorsed at the 2020 Annual General meeting held on 10 August 2020:

- Section A, General, clause A8: one definition (*member*) was amended and two others added (*honorary life member* and *teleconferencing*).
- Section B, Membership and subscriptions: new clause B24 added to set out the obligations of members. Prior to this the rights of members were set out in the Constitution, but the obligations of members were not.
- Section D, Officers: clause D4 amended to state the powers and responsibilities of the Executive and new Clause D5 inserted to set a quorum for Executive decisions to three members of the Executive.
- Section E, Council, clause E5: amended to insert the word ‘personal’ before ‘member’ for internal consistency with clauses A8 (Definitions) and B9 (eligibility for election to Council)

- Section G, Meetings of the Society: clause G19 amended to set the quorum for a general meeting at ten (10) members.

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. Registers are held and maintained by the Secretary unless otherwise noted.

Registers include:

- Accreditation Register (managed by Chair, Accreditation Committee)
- ANZSI Awards and Medal Register, a list of Medal judges and award winners and book titles for each year in which awards have been held
- Contact and Corporate Details Register
- Documents Register (register of official numbered Council documents) \*
- Groups Register (list of groups created and disbanded)
- Library Catalogue for the Australian and New Zealand collections \*
- Member Register (managed by the Membership Secretary)
- Resources Register – list of ANZSI property excluding the Library. \*

\* indicates that the register is on the website in the Members Area.

## ANZSI Newsletter indexing project

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

- Correspondence with the active volunteers continued.
- Some changes (such as corrections, and re-phrasing of index headings and subheadings) were made in the 1973–92 data as later data was incorporated.
- The 1994 index was published on the website.

Indexes for individual years will be published as they are completed and reviewed.

A new cumulative edition will be published once contiguous year indexes immediately post-1992 are available.

## Standards

During the 2020–21 year the US National Information Standards Organization Criteria for Indexes (Z39.4) Working Group issued for review its draft standard on criteria for indexes.

Council sought comments from ANZSI members. We particularly thank Glenda Browne for her comments. These with some additional remarks from Michael Ramsden and Sherrey Quinn were forwarded to the Co-Chairs of the NISO Working Group.

## Treasurer's report

*Karen Gillen, Treasurer (1 July 2020 – 21 March 2021)*

*Position vacant (22 March 2021 – 30 June 2021)<sup>1</sup>*

### Investment performance

Low interest rates throughout the reporting period resulted in greatly reduced income from interest earned on the Society's current term deposit (with ME Bank) compared to previous years. However, the total was boosted by the refund of withholding tax (AU\$251.02) deducted in error by AMP from the interest earned on the Society's term deposit with that institution in 2016/17.<sup>2</sup>

### Financial performance

#### Net profit

The Society achieved a net profit of AU\$3,744.91 during the 2020–21 financial year (see Profit and Loss Statement below).

Income: Revenue was generated primarily from the Society's regular sources of income (i.e., membership subscriptions, *Indexers Available* fees, and investments). This was boosted by the withholding tax refund mentioned above and copyright payments related to the ANZSI Newsletter.

Expenses: Although the ANZSI Library and the Society's professional development initiative created new expense categories, overall expenditure was reduced in comparison with the previous financial year largely as a result of significant savings in the following areas:

- *Teleconferencing.* The switch from Redback teleconferencing to Zoom resulted in a saving of AU\$811.
- *Website management.* The outsourcing of the management of the Society's website (to WebGrow) resulted in a saving of AU\$366.
- *ANZSI Officers.* The position of Web Manager was discontinued following the contracting of WebGrow, and the Admin Officer took leave for 6 months, resulting in a combined saving of AU\$1500.

#### Assets

At 30 June 2020, the Society's held assets of AU\$116,563.62 (see Balance Sheet below), an increase of AU\$3,744.91 from the previous financial year (see Profit and Loss Statement below).

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<sup>1</sup> In the absence of an official Treasurer, Karen Gillen continued to act as bookkeeper for the Society for the remainder of the financial year.

<sup>2</sup> As a non-profit organisation, the Society is not required to pay tax.

# Profit and Loss

## Australian and New Zealand Society of Indexers (ANZSI) For the year ended 30 June 2021

2021

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### Trading Income

Bank & Investment Interest Income	552.86
Indexers Available Fees	1,750.00
Indexers Available NZ	373.29
Membership Fees	6,990.00
Membership Fees NZ	878.07
NZ Currency Conversion Adjustment	9.41
Publications	737.48
<b>Total Trading Income</b>	<b>11,291.11</b>

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### Gross Profit

**11,291.11**

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### Operating Expenses

Consulting & Accounting	969.20
Email	487.69
Insurance	696.00
Library Costs	35.35
Merchant Fees	640.14
Postage	366.00
Professional development/networking costs	344.16
Subcontractors - ANZSI officials	2,000.00
Teleconferencing	355.21
Website Costs	1,652.45
<b>Total Operating Expenses</b>	<b>7,546.20</b>

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### Net Profit

**3,744.91**

# Balance Sheet

Australian and New Zealand Society of Indexers (ANZSI)

As at 30 June 2021

30 JUN 2021

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## Assets

### Bank

ANZSI - Chq Account #791	50,449.57
ANZSI - Comm Solutions #350	532.92
ME Business Term Deposit	60,824.09
Paypal - ANZSI	1,988.07
<b>Total Bank</b>	<b>113,794.65</b>

### Current Assets

ANZSI New Zealand Account	2,768.97
<b>Total Current Assets</b>	<b>2,768.97</b>

### Total Assets

**116,563.62**

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## Net Assets

**116,563.62**

## Equity

Current Year Earnings	3,744.91
Retained Earnings	112,818.71
<b>Total Equity</b>	<b>116,563.62</b>

## **NOTES TO AND FORMING PART OF THE FINANCIAL STATEMENT FOR THE PERIOD ENDED 30 JUNE 2021**

### **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 2021.
- 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**

## **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 2021, 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 centre.

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 mis-statement. 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 with out 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.

# 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 2021 and of the results of its operations for the period ended 30 June 2021.
- b) in accordance with applicable Accounting Standards; and
- c) in accordance with the provisions of the Association Incorporation Act.

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

30/07/2021  
\_\_\_\_\_  
Date

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

**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 2021;
- 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 2021; 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.



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Sherrey Quinn  
Secretary

14/8/2021



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Madeleine Davis  
President

14/8/2021

## MEMBERSHIP

### 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 one-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 will be recorded in the Member Register as having resigned.

**Table 1. Subscription fee structure, 1 July 2020 to 30 June 2021**

	Individual membership	Institutional membership
Australian members	AUD90	AUD115
New Zealand members	AUD63	AUD115

#### Membership statistics

##### Total membership

At 30 June 2021, ANZSI had a total of 97 members. In 2020 there were 99 members.

**Table 2. Breakdown of 2020–2021 membership by location and type**

Location	Life members	Institutional members	Personal members	Total membership
ACT	2	2	9	13
NSW	2	0	20	22
NT	0	0	0	0
NZ	0	0	12	12
QLD	0	0	8	8
SA	0	0	6	6
TAS	0	0	4	4
VIC	2	1	24	27
WA	0	0	3	3
OVERSEAS	0	0	2	2
<b>TOTALS</b>	<b>6</b>	<b>3</b>	<b>88</b>	<b>97</b>

### Comparison of 2020 and 2021 statistics

There were 2 losses in membership for the 2020–2021 period.

**Table 3. Comparison of membership figures in 2020 and 2021**

Location	Membership at 30 June 2020	Membership at 30 June 2021	Gains	Losses
ACT	12	13	1	–
NSW	27	22	–	5
NT	0	0	–	–
NZ	11	12	1	–
QLD	9	8	–	1
SA	6	6	–	–
TAS	4	4	–	–
VIC	26	27	1	–
WA	3	3	–	–
OVERSEAS	1	2	1	–
<b>TOTALS</b>	<b>99</b>	<b>97</b>	<b>4</b>	<b>6</b>

### Accredited Indexers

Accredited indexers may only claim this status as long as they are financial members of ANZSI. At 30 June 2021 there were 29 accredited indexers.

**Table 4. Accredited indexers at 30 June 2021**

Location	Accredited indexers
ACT	5
NSW	10
NT	0
NZ	4
QLD	0
SA	0
TAS	2
VIC	8
WA	0
OVERSEAS	0
<b>TOTALS</b>	<b>29</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 2020–2021 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 2021. 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 2020 to 30 June 2021**

Australian members	AUD35
New Zealand members	AUD31

### Indexers Available statistics

At 30 June 2021 there were 54 members with an Indexers Available listing. This is 2 more than for the 2019–2020 period.

**Table 6. Members listed on Indexers Available at 30 June 2021**

LOCATION	TOTAL SUBSCRIBERS
ACT	6
NSW	14
NT	0
NZ	9
QLD	3
SA	2
TAS	2
VIC	15
WA	2
OVERSEAS	1
<b>TOTALS</b>	<b>54</b>

## ANZSI Groups Coordinator's report

*Michael Ramsden, Vice-President and Groups Coordinator. Report by Sherrey Quinn, Secretary*

It has been another quiet year for groups, owing to the impact of the COVID-19 virus and the difficulty of holding face-to-face meetings during the resulting lockdowns and restrictions on numbers attending meetings. Groups met socially when possible, and all members have benefited from the professional development meetings held via video-conference.

The Report of the Restructure Committee (Doc 39-006, 15 October 2014) envisaged the possibility of interest groups as well as those geographically based. The Society, however, has no currently active interest group.

Groups active during 2020–21 are the 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. The COVID-19 situation, though better in New Zealand than most places, has probably discouraged travel for meetings, so we appreciated the ANZSI biography teleconference last year. Fortunately, the publishing houses continue to provide interesting non-fiction for us to index. The group is still enjoying *The Indexer* subscription and use of the New Zealand library, and we co-operate in passing on jobs that we can't handle.

### Canberra Region Indexers

*Shirley Campbell, Convenor*

There were 12 members of the group this year including two institutional members. COVID-19 restrictions limited the opportunity for members to meet face-to-face during the year.

Four members attended an informal meeting over lunch on 28 November 2020 at the Oaks Brasserie Yarralumla. News of current indexing projects was shared and in particular experiences with commonwealth government annual report indexing were discussed.

On her second attempt the President, Madeleine Davis, was cleared to travel from the Blue Mountains to Canberra and on 1 March 2021 met with five members for lunch at the National Museum of Australia on a beautiful autumn day. It was a great opportunity to emerge from COVID-19 restrictions to catch up and share our indexing experiences.

Warm congratulations were extended to ACT member Edwin (Ted) Briggs who was awarded the Institute of Professional Editors (IPEd) highest award, the Janet Mackenzie Medal. The award is given to an outstanding professional editor who has lifted the standard of the editing profession and/or given exemplary service to IPEd. Details are given in the *ANZSI Newsletter*, Vol 17, No 3, June 2021, p. 10–11.

## **Indexers SA**

*Jane Oliver, Convenor*

Indexers SA held an enjoyable social gathering at the Est Ovest Restaurant in Adelaide on 19 March 2021 to catch up on individual indexing activities. Unfortunately, COVID-19 restrictions prevented more face-to-face meetings in 2020-21. However, as a professional development activity and to generate a discussion of the issues encountered, Silvia Muscardin and Jane Oliver emailed a report to other members about Indexers SA's indexing project at the Adelaide Zoo. The report was received with interest, and it generated much discussion.

We hope to plan more activities when restrictions are lifted.

## **NSW Indexers**

*Glenda Browne, Acting Convenor*

There are currently 26 members of the NSW Indexers Group. The group uses a Google Groups mailing list to share information and to organise events.

Members were sad to hear in September 2020 that long-term member Carolyn Kearney had died after a long illness. She was much valued as a friend and indexer.

A small pre-Christmas lunch was held in Blaxland in December 2020. Many members did not feel ready to travel, but those who attended enjoyed a delicious and interesting lunch.

NSW group member Glenda Browne represents ANZSI in the Australian Inclusive Publishing Initiative (AIPI). Because of COVID and the departure of the AIPI Chair not much happened this year apart from email discussions.

## **COMMUNICATIONS**

### **Newsletter Editor's report**

*Elisabeth Thomas, Editor*

The *ANZSI Newsletter* appeared at the regular intervals in August, October, December 2020, February, April and June 2021.

Professional development events gave rise to well-received reports published in several issues. Thanks go to Karen Gillen, as organiser and one of the presenters of the events over the last year, who wrote a number of these reports.

The arrival and continued presence of COVID-19 has reduced events here and overseas leading to a notable decline in news of who is doing what, with a few ANZSI events and international gatherings unfortunately cancelled or postponed before some later moved online.

Members are always encouraged to submit content to the *ANZSI Newsletter*. Contribute to *your* newsletter, share your knowledge and skills with your colleagues.

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.

## Communications Officer's report

This year, the main change to the position of Communications Officer was the amendment of the position description. Communications Officer roles now include updating the members area of the website with newsletters from affiliate indexing societies, and emailing members to link them to these resources when they are added. This includes adding new issues of *Key Words* to the council area, and emailing council members regarding this.

The primary roles of distributing emails and adding and deleting members from Mailchimp has continued as usual. Messages regarding certain newsletters, a professional development video meeting, and membership renewals were opened at the highest rate (over 72%).

## Website Review Subcommittee report

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

### Management of website

At the close of the previous reporting period, ANZSI Council decided to discontinue the ANZSI Officer position of Web Manager, and to hire an external website management company which would manage the technical aspects of the website, mail servers, WordPress software and security. Throughout the latter half of 2020, the Subcommittee took over the interim management of the website, and drew up a short list of website management companies. After further consultation with each of the short-listed companies, the Subcommittee recommended that the Society employ WebGrow, a Sydney-based company, previously employed on an ad hoc basis to address maintenance issues as they arose.

In early 2021, following Council approval, WebGrow was contracted to manage, maintain, and host the Society's website and email services. The Chair of the Subcommittee acts as the contact person.

The changeover of host from Dreamhost to WebGrow took place in March 2021 with no loss of service to members. With guidance from the Website Review Subcommittee, WebGrow is now managing technical website matters.

To date, the Society has been impressed with the prompt and diligent service provided by WebGrow.

### Website content

Throughout the reporting period, content on the website remained the responsibility of ANZSI officers, and members of the Subcommittee and the Communications Officer were responsible for implementing any requested changes or uploading of content.

### Facebook page

ANZSI's Facebook page (<https://www.facebook.com/ANZSocietyIndexers>) is maintained by Glenda Browne, with posts usually made by Glenda and Madeleine Davis.

Posts typically cover indexing news from ANZSI and affiliated indexing societies, notices of indexing-related publications and topical events.

## EDUCATION AND PROFESSIONAL DEVELOPMENT

### Education Officer's report

Karen Gillen resigned from the position of Education Officer on 21 March 2021. At the end of the reporting period, the position was yet to be filled.

### Training

Due to the COVID-19 pandemic, no face-to-face indexing training was held during the reporting period.

### Professional Development Program

The Society's first annual professional development program was implemented during the reporting period. Meetings were held via Zoom video-conference enabling all ANZSI member to participate regardless of their location. The events were well-attended and well-received by members, and generated the production of some useful resources for members.

### Biography Indexing Q&A (Sunday, 26 July 2020, 3.00–4.30pm AEST)

*Organiser:* Karen Gillen

*Host:* Sherrey Quinn

*Chair:* Madeleine Davis

*Panel:* Tordis Flath [NZ]; Trevor Matthews [NSW], and Michael Wyatt [NSW]

Past surveys of members had revealed a high level of interest in learning more about biography indexing, so this topic was chosen for the Society's inaugural society-wide meeting. A panel of specialist biography indexers was assembled and questions were sought from members in advance of the session.

*Participants:* Promotion of the event met with an enthusiastic response from members, and 27 members (including the chair and panel) attended the meeting. The group included participants from the Australian Capital Territory, New Zealand, New South Wales, and Victoria.

*Program:* The questions that had been submitted were collated and grouped into three blocks covering: headings and locators; subheadings; and production issues. Panellists were supplied the questions in advance so that they could prepare their responses.

*Evaluation by participants:* An evaluation form was sent out to all participants following the session. The responses were overwhelmingly positive regarding the structure and content of the session, and the fact that it had been held at all; and a number of useful suggestions were made for any future PD events.

*Outcomes:* Some valuable resources for all members were produced as a result of the meeting. In response to a suggestion from one of the participants, the panel put together a list of exemplary biography indexes. This list was published in the *ANZSI Newsletter*. A detailed report of the questions and answers supplied at the meeting was also published in the *Newsletter*. Both of these resources were also uploaded to the Recommended Reading and Guidance section of the Member Area of the Society's website.

### **Business Tips: Quoting** (Tuesday, 10 November 2020, 3.00pm AEST)

The next event in the program focused on the all-important indexing business-related topic of quoting. The format comprised a series of presentations by highly experienced freelance indexers.

*Organiser/Chair:* Karen Gillen

*Host:* Sherrey Quinn

*Presenters:* Nikki Davis (VIC); Karen Gillen (VIC); Sherrey Quinn (ACT)

***Participants:*** As with the first meeting on the program, promotion of this event also met with an enthusiastic response from members. Again, 27 members (including the presenters) attended the meeting, however, of these 12 had not attended the previous meeting. The group included participants from Australian Capital Territory, New Zealand, New South Wales, Queensland, South Australia.

***Program:*** The session was divided into five sections. The first (presented by Karen Gillen) focused on employing a professional approach to quoting. The next three sections focused on how to calculate fair and reasonable fees for different types of indexes: monographs and edited collections (Karen Gillen); illustrated texts (Nikki Davis); and annual reports (Sherrey Quinn). The final section was a Q&A session, with questions submitted via chat or 'from the floor'.

***Evaluation by participants:*** An evaluation form was sent out to all participants following the session. Again, the responses were uniformly positive regarding the structure and content of the session, and a number of useful suggestions were made for future PD events.

***Outcomes:*** Articles based on each of the presentations was published in the ANZSI *Newsletter*. This valuable collection of articles was also uploaded to the Recommended Reading and Guidance section of the Member Area of the Society's website.

### **Business Tips: Marketing**

At the end of the reporting period, planning was underway for the next event on the professional development program. The focus for this session will be on how to market one's services and find work, especially for beginning or early career freelance indexers.

## **Accreditation Committee report**

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

Accreditation Committee members are Sherrey Quinn, Madeleine Davis, Tordis Flath, Karen Gillen, Jean Norman and Shirley Campbell (Receiving Officer).

The suspension of Accreditation application processing which began in March 2020 due to the COVID pandemic was lifted on 1<sup>st</sup> January 2021. ANZSI members were advised of this in the December 2020 Newsletter, and notices were placed on the website.

No applications were received between 1 January 2021 and 30 June 2021.

The Accreditation application fee, last updated in 2016, was increased in June 2021 by a modest \$5 to \$95 (Aus\$ and NZ\$), covering increased postage and administrative costs and putting it at a different price point from the membership fee, which is helpful in administering accounts.

## **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). Report prepared by Karen Gillen*

### **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.

### **Acquisitions**

No acquisitions were made during the reporting period.

### **Loans**

Given the ongoing COVID-19 pandemic, protocols for the safe handling of items being borrowed were adhered to prior to postage and following their return.

## **AWARDS**

### **Awards Committee report**

*Shirley Campbell, Receiving Officer.*

ANZSI Indexing Awards and the John Simkin Medal are offered biennially and were 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.

A call for nominations for the 2021 awards was placed in the ANZSI Newsletter in February 2021 and nominations closed on 30 June 2021. Ten nominations were received and judging is now in progress.

### **2021 Judging panel**

Glenda Browne (ANZSI Accredited Indexer, co-author of *The Indexing Companion* CUP 2007, recipient of Highly Commended Indexing Award 2008)

Joanne Mullins (Coordinator, Monash University Publishing)

Jean Norman (ANZSI Accredited Indexer, ANZSI Accreditation Panel Member, 2016 and 2018 Judging Panel member)

## INTERNATIONAL ACTIVITIES

### International Committee of Representatives of Indexing Societies report

*Report compiled by Madeleine Davis*

#### ICRIS (International Committee of Representatives of Indexing Societies)

In view of the ongoing COVID-19 crisis during 2021 and the expected prolonged reluctance and obstacles to international travel, the 2021 triennial conference committee decided to postpone the Berlin conference until October 2022. The conference is being organised jointly by the Netherlands and German indexing networks (NIN and DNI) and the Society of Indexers (SI), with the support of the Deutsche Gesellschaft für Informationswissenschaft und Informationspraxis (DGI).

The ICRIS coordinators proposed that the ICRIS triennial meeting also be postponed to October 2022, to be held in conjunction with the postponed Berlin conference. In addition, it was agreed that the current ICRIS Coordinators' term be extended by one year until the October 2022 triennial meeting.

#### Informal ICRIS meeting

An informal ICRIS meeting was held via Zoom on 7 April 2021, starting at 5.00 am in Canada and 10.00 pm Australian time. The meeting began with a summary of activities from each society, membership numbers and retention, the amount of work received during COVID-19 restrictions and ideas for future international conferences and how they can be conducted.

Significant initiatives of other societies include mentoring, promotion and profile-raising (insertion of representatives in other associations) and social meetings. ANZSI's Library initiative was regarded by other societies as an excellent idea. The meeting was attended by representatives of every affiliated indexing society (15 people), and ANZSI was represented by Madeleine Davis and Tracy Harwood.

All participants agreed that the meeting was an excellent opportunity to exchange views and ideas between all societies and ICRIS plans to hold another Zoom meeting on 29 September.

#### American Society for Indexing (ASI)

ASI held a virtual conference 'Get Your Indexing Shot in the Arm' from 30 April to 1 May, 2021.

#### Indexing Society of Canada / Société canadienne d'indexation (ISC/SCI)

The ISC/SCI conference to be held in St Johns, Newfoundland, from 12 to 13 June 2021 was cancelled. However, ISC/SCI did hold a virtual conference "Indexing Unlimited" from 27 to 29 May this year. Subscribers could stream events in real time and sessions were recorded and made available to all registered attendees for later viewing.

#### *The Indexer*

##### Access arrangements for *The Indexer*

Liverpool University Press, publisher of *The Indexer*, had proposed that back issues would be available to subscribers only. Representations from SI and affiliated indexing societies, including ANZSI, were successful in arguing against this and access arrangements for *The Indexer* remain unchanged. That is, issues older than five years will remain on open access as a reference source for indexers worldwide.

**End of ANZSI Annual Report for 2020–21**