



Australian and New Zealand
Society of Indexers Inc.

ABN: 38 610 719 006

GPO Box 2069
Canberra ACT 2601
www.anzsi.org

Annual Report
2022–23

CONTENTS

PRESIDENT’S REPORT FOR 2022–23	3
Introduction	3
Highlights of 2022-23	3
Membership	3
Council and committee changes	3
Group activity	4
Professional Development	5
Accreditation	5
ANZSI Indexing Awards and John Simkin Medal 2023	5
ANZSI recommended rate for indexing	5
Membership fees	5
Acknowledgements	6
ADMINISTRATION	7
Secretary’s report	7
Treasurer’s report	8

PRESIDENT'S REPORT FOR 2022–23

Madeleine Davis, President

Introduction

This President's report for 2022–23 was presented at the ANZSI AGM for 2022–23, held by Zoom videoconference on 19 October 2023.

Highlights of 2022-23

Arising out of the COVID-19 restrictions over two years and our growing familiarity with the use of Zoom, the idea of informal 'social chat' meetings for members had been canvassed by Council late in 2021 and continued through 2022 and this year. **Quarterly Zoom Catch Ups** for all ANZSI members were held on Thursday 7 July and 30 October 2022.

We held the **ANZSI National Indexing Day** at the end of the first quarter on 30 March with fourteen members joining the Zoom replay of Sam Leith's Berlin Conference 2022 Keynote Speech, "Developments in publishing". A quarterly member catch-up discussion was held online afterwards.

This year Council finalised its discussion concerning a proposal from the **Institute of Professional Editors (IPEd)** to develop an Affiliate Agreement between IPEd and ANZSI has now formally agreed to the proposal. The Agreement allows members of ANZSI to register for IPEd conferences, webinars and online training courses and other mutually agreed training and development services at the same price as IPEd members, and vice versa for IPEd members considering participation in similar ANZSI activities.

Membership

An ongoing concern of Council is ANZSI's declining membership, now numbering 86

as at the end of June this year with 25 Accredited members and 42 members with an Indexers Available listing. Last years' figures were 90, 28 and 51 respectively.

Membership decline has been due to retirements and, sadly, deaths of members. Although we have welcomed new members, the number has not yet made up for losses, in spite of an active program of meetings and professional development in recent years.

Vale Geraldine Suter

Geraldine became a member of AusSI (later ANZSI) in 1984. She was also a member of the Victorian Branch Committee from 2000-2001, Chair of the Medal Judging Panel in 2000, member of that Panel in 2001 and Editor of the Newsletter from 1985 to 1991.

Geraldine was an accomplished indexer, gaining Registration status in 1991 (the precursor to Accreditation), an ANZSI Medal Winner and winner of a 'Highly Commended' index.

Council and committee changes

Membership Secretary

Council accepted (reluctantly) Nikki Davis' decision to step down as Membership Secretary at the end of her current term (June this year). Nikki has been an extremely efficient and friendly manager of the membership joining and renewal processes and Council is very grateful for her contribution. Council is also very grateful that Glenda Browne has stepped into the role as from 1 August this year.

Receiving/Contact Officer: Accreditation and ANZSI Indexing Awards

Shirley Campbell has stepped back from these responsibilities this year, with Sherrey Quinn taking on these duties.

ICRIS international liaison officer

Tracy Harwood who has been our ICRIS international liaison officer since November 2019 has stepped down from the role this year.

The ICRIS Liaison role includes monitoring the ICRIS email list and liaising with ANZSI Council on international matters raised by ICRIS. The term of appointment is for three years to coincide with its formal triennial meeting. ICRIS meets informally by Zoom twice a year, with some informal meetings held at international conferences.

As ANZSI President, I am on ICRIS as an ex officio member, but I would love to see another ANZSI member join me.

Conference Committee

The 2023 Conference Committee was established and met regularly from 7 November 2022. Membership comprises Sharon Betridge (Chair), Mary Coe, Madeleine Davis and Elisabeth Thomas (members) and for budget matters, Karen Gillen (Accounts Officer).

The Conference will take place from 19-21 October in Wagga Wagga, NSW.

Council meetings

Council has moved from meeting every 6 weeks and will now meet approximately every 8 weeks from now on, with a break over the Christmas/New Year period. Any urgent matters can be dealt with by email or by the Executive. This will also allow the Secretary, Membership Secretary, Accounts Officer and Communications Officer more leeway in preparing their reports/minutes.

International Committee of Representatives of Indexing Societies (ICRIS)

Glenda Browne was our official representative at the Berlin Triennial ICRIS meeting and, which was held in conjunction with the 2022 conference of indexing societies from 17 to 18 October 2022. The Berlin ICRIS meeting included discussion of updates to the International Agreement of Indexing Societies and the ICRIS Terms of Reference and also a proposal for an independent ICRIS website.

ANZSI hosted the April informal meeting of ICRIS by teleconference on 12 April 2023. The meeting, attended by representatives of eight international indexing societies/networks, heard brief updates on each society, reports on National Indexing Day (Australia and UK), a report on The Indexer, and discussed the proposed ICRIS website. There were also interesting presentations from the Chinese Society of Indexers on new trends in indexing in China including digitisation of ancient documents.

Members agreed to the establishment of an international indexing website, a simple 'landing' page with a list of all the national indexing societies/networks and referring links and separate pages with general information on indexing, links to The Indexer and ICRIS and a perhaps blog or events diary that might also feature on the front page to announce conferences. Each society could also have its own page on the website with further information and links. For example, the ANZSI page could include some information about the Society, the indexing awards and Indexers Available, with appropriate links to pages on the ANZSI website. Further discussion about the website took place at the ICRIS meeting at the ISC/SCI Conference in Newfoundland in June 2023. ANZSI has previously agreed to pay for and manage the website. The Canadian, German and Netherlands societies are happy to assist.

Group activity

It is encouraging to know that groups are meeting face-to-face again.

The ACT Group held a members' lunch on 24 November 2022 (7 attendees) and another on 20 February 2023 (6 attendees).

On Saturday 9 July 2022, 4 members of Tasmania’s small group of indexers got together for a casual lunch.

On 5 March 2023, the NSW Indexers Group held a lunch in Blaxland, hosted by Glenda Browne, Jenny Browne and Jon Jermey with 4 guests.

Professional Development

The Indexing Society of Canada / Société canadienne d'indexation (ISC/SCI) had approved ANZSI Council’s request for permission to re-broadcast sessions, at a mutually agreed payment, from their 2022 hybrid conference. The organisers of the Berlin conference in October 2022 also agreed. These re-broadcasts were free to ANZSI members.

Consequently under our professional development program we were able to re-broadcast:

- ‘In Defense of Marking Up’ on 28 September 2022;
- ‘From Data to Done: Insights into Managing Workflow’ on 19 November 2022;
- ‘Dennis Duncan, talks about his book *Index, A History of The*’ on 16 February 2023
- ‘Hacking Yourself: think like a hacker to prevent cyber attacks’ on 27 April 2023; and
- ‘Software vendors: tips and tricks – Macrex, Index Manager, Cindex, IndexExploit’ on 4 March 2023
- ‘Embedded indexing with Word’ on 25 May 2023

Being able to rebroadcast these conference sessions has been invaluable for ANZSI. However, these opportunities many not happen any longer as societies meet face to face again after COVID-19. Neither ASI , ISC/SCI , nor SI recorded their conferences this year. This will be a great pity , particularly for ANZSI members who have difficulties attending overseas conferences in distant lands.

ANZSI, however, is recording some of its 2023 conference and will make the sessions available to both our members and to overseas societies and networks.

Accreditation

Three applications were finalised during 2022–23, all unsuccessful. The Panel of Assessors noted that all three applications were for indexes to books which were extremely challenging to index.

ANZSI Indexing Awards and John Simkin Medal 2023

Guidelines for the ANZSI John Simkin Medal Judging Panel were reviewed by Council at its 25 July 2022 meeting. Basically, Council discussed and recommended enhancements to the Guidelines for the Award Judging Panel to emphasise reference to ‘complexity of subject matter’ (which has always been a criterion for eligibility for nomination for the Awards) and to encourage the judging panel, at their discretion, to include the titles of shortlisted entries in their final report.

A call for nominations for the awards was distributed by email on 4 April to all ANZSI members and allied organisations with a closing date of 30 June. At Council’s June 2023 meeting it was resolved, for administrative reasons, that the awards would be postponed until 2024.

ANZSI recommended rate for indexing

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

Membership fees

Membership fees remain at the same level as last year.

Acknowledgements

I would like to acknowledge with gratitude the work of Nikki Davis and Karen Gillen in again maintaining membership records and renewal procedures and to Shirley Campbell for administration and support of the John Simkin Medal and Accreditation processes as well as taking on the Vice President role.

My thanks are also extended to Elisabeth Thomas for her sterling editorship of the ANZSI Newsletter this year, to Jenny Browne as Communications Officer, to Glenda Browne who manages our social media sites, and to Tracy Harwood for her contribution to ICRIS matters.

A special thanks to Karen Gillen who continued as Accounts Officer and to Michael Wyatt for continuing as ANZSI Treasurer.

Thanks too to the other members of the Accreditation Committee – Jean Norman, Karen Gillen and it's Chair Sherrey Quinn – for the time they put into evaluating indexes and writing mentoring reports.

ANZSI would not be able to function as well as it does without the remarkable Sherrey Quinn as Secretary.

I also extend my thanks to all the Members of Council for the ongoing contributions in their roles.

ADMINISTRATION

Secretary's report

Sherrey Quinn, Secretary

Council membership 2022–23

President	Madeleine Davis
Vice-President	Shirley Campbell
Secretary	Sherrey Quinn
Treasurer	Michael Wyatt
Council members	Sharon Betridge; Marnie Hannagan; Elisabeth Thomas

Officials of the Society

Membership Secretary	Nikki Davis
Editor of the <i>ANZSI Newsletter</i>	Elisabeth Thomas
Accounts Officer	Karen Gillen
Communications Officer	Jenny Browne
Education Officer	Mary Coe
Groups Coordinator	Madeleine Davis
Accreditation and 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 until 1 May 2023; vacant 2 May to 30 June 2023
Library Officers	Australia: Karen Gillen; New Zealand: Carol Dawber

Committees and special volunteers

Accreditation Committee	Sherrey Quinn (Chair), Madeleine Davis, Tordis Flath (to 19 September 2022), Karen Gillen, Tracy Harwood (from 19 September 2022 to 30 June 2023); Jean Norman and Shirley Campbell (Receiving Officer)
ANZSI Indexing Award – John Simkin Medal Committee	Madeleine Davis, Tracy Harwood; one additional member to be appointed
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

Council meetings

Council meetings during the financial year 2022–23 were held by teleconference on 19 September 2022, 17 October 2022, 6 February 2023, 27 March 2023, 1 May 2023, and 26 June 2023. The final meeting of the 2022–23 Council was held on 21 August 2023. 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 the financial year 2022–23 was held on 19 October 2023 via videoconference.

Fees

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 remained at \$95 (Aus\$ and NZ\$), covering postage and administrative costs.

Treasurer’s report

Michael Wyatt, Treasurer

Karen Gillen, Accounts Officer

Investment performance

Higher interest rates resulted in an increase in income from interest earnings compared to the previous year.

Financial performance

Profit/Loss

The Society recorded a net loss of AU\$450.22 during the 2022–23 financial year.

Income: Revenue was generated primarily from the Society’s regular sources of income (i.e., membership subscriptions, Indexers Available fees, and investments).

Expenses: Principal expenses are for payments associated with website management and maintenance fees; ANZSI officers; bank, accounting fees and auditing fees; and insurance fees.

Assets

At 30 June 2023, the Society held assets of AU\$114,847.76, a decrease of AU\$450.22 from the previous financial year.

Council’s policy is to spend money for the benefit of members, particularly on website, newsletter and communications, conferences and professional development.

Australian and New Zealand Society of Indexers Inc.

PO Box 43 Lawson NSW 2783

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

ABN 36 610 719 006

FINANCIAL REPORT for 1 July 2022 to 30 June 2023

CASH INFLOWS

Jul 2021 - Jun 2022	ITEM	Jul 2022 - Jun 2023
\$190.00	Accreditation Fees	\$190.00
\$547.42	Bank and Investment Interests	\$1,286.17
\$1,550.72	Indexers Available Fees (Inc NZ)	\$1,369.91
\$7,234.77	Membership Fees (Inc NZ)	\$6,110.94
\$349.30	Publications / Newsletter	\$101.07
\$0.00	Sundries	\$0.12
\$9,872.21	TOTAL	\$9,058.21
	Transfers from other accounts	

CASH OUTFLOWS

Jul 2021 - Jun 2022	ITEM	Jul 2022 - Jun 2023
\$14.15	Accreditation Costs	\$0.00
\$1,688.10	Accounting / Auditor / Consulting / Insurance	\$966.50
\$482.65	Advertising / Awards/ Gifts / Promotion / Publicity	\$0.00
\$632.49	Bank Fees / Merchant Fees	\$653.90
\$0.00	Conference Costs	\$250.00
\$522.10	Email	\$644.96
\$1,500.00	ICRIS Costs	\$0.00
\$699.02	Library Costs / Printing / Postage and Stationery	\$317.51
\$0.00	Miscellaneous Expenses	\$632.58
\$520.74	Professional Development & Networking Costs	\$0.00
\$3,000.00	Subcontractors ANZSI Officers	\$3,000.00
\$230.89	Teleconferencing	\$230.89
\$10.00	Travel - National	\$0.00
\$2,108.86	Website Costs	\$2,413.00
\$11,409.00	TOTAL	\$9,109.34
	Transfers from other accounts	

NET CASH FLOW for the period **(\$51.13)**

ASSETS NZ Currency Conversion **(\$399.09)**

30-Jun-22	ITEM	30-Jun-23
\$48,027.31	Westpac Cheque Account	\$46,057.32
\$2,541.55	Westpac Community Solutions Account/Paypal	\$2,748.39
\$61,371.51	Term Deposit - ME Bank	\$62,657.68
\$3,357.61	Cash at Bank (New Zealand Account)	\$3,384.37
\$115,297.98	TOTAL	\$114,847.76

NOTES TO AND FORMING PART OF THE FINANCIAL STATEMENT FOR THE PERIOD ENDED 30 JUNE 2023

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 2023.
- 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 2023, 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 2023 and of the results of its operations for the period ended 30 June 2023.
- b) in accordance with applicable Accounting Standards; and
- c) in accordance with the provisions of the Association Incorporation Act.



Signature of Auditor

03/08/2023

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 2023;
- 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 2023; 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.

Original signed by Secretary

Secretary

MELBOURNE

23 / 8 / 2023

Original signed by President

President

MELBOURNE

23 / 8 / 2023

End of ANZSI Annual Report for 2022–23