



Australian and New Zealand
Society of Indexers Inc.

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Annual Report
2023–24

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PRESIDENT'S REPORT FOR 2023–24

Madeleine Davis, President

Introduction

This report was presented at the 2023–24 ANZSI AGM held by Zoom videoconference on 29 August 2024.

The year in review

ANZSI Conference

A successful ANZSI Conference Making Connections was held on 19–20 October 2023 at Charles Sturt University (CSU), Wagga Wagga, NSW with 21 delegates attending. Unfortunately two would-be attendees had to drop out at the last minute.

An Advanced (Refresher) Indexing Half-Day Workshop was presented by Max McMaster on Saturday 21 October with seven attendees.

Responses by attendees at the conference indicated that they thought there was a good mixture of presentation and interactive sessions. Talking about indexing among colleagues was a highlight and the relatively small number of attendees made it intimate and collaborative.

ANZSI provided a 50 per cent travel subsidy to all ANZSI members. ANZSI conference recordings of sessions are online free to ANZSI members.

Karen Gillen organised a display of the ANZSI Library books which proved useful to browse through and borrow from by attendees. Several surplus books and journals (donated over the years) were offered free to delegates.

Congratulations for the organisation goes to the Conference Committee: Sharon Betridge (Chair), Mary Coe, Elisabeth Thomas and myself (members) and, for budget matters, Karen Gillen (Accounts Officer). Kudos especially to Mary Coe and CSU for their seamless facilities and organisation, to Emma Coe for recording and photography and to the Magpies Nest restaurant for an excellent conference dinner.

At the conference, Sherrey Quinn was awarded the ANZSI John Simkin Medal for her index to *Murujuga: rock art, heritage and landscape iconoclasm*, by José Antonio González Zarandona (University of Pennsylvania Press, 2020).

A full report of the conference by Jenny Browne was published in the December 2023 ANZSI Newsletter (vol 19, no 6).

Membership

Following last year's report, an ongoing concern of Council is ANZSI's declining membership, now numbering 80 as at the end of June 2024, with 22 Accredited members and 38 members with an Indexers Available listing. Last year's figures were 86 members, 25 Accredited members and 42 members with an Indexers Available listing.

Membership decline has been due to retirements and, sadly, deaths of members. This year we have welcomed a few new members and hopefully, our initiative in establishing the ANZSI Indexing Scholarship will boost these numbers.

Membership fees

ANZSI membership fees for 2023–24 remained the same as the previous year.

ANZSI recommended rate for indexing

Both recommended rates for Australian and New Zealand indexers remained at the same rate as last year (\$70 and \$55 respectively).

Professional Development Program

The professional development program continued with a rebroadcast via Zoom of the 'What's in an index?' and the 'International indexing dictionary' from the "Continental Connections" International Indexing Conference in Berlin October 2022.

ANZSI Library

The ANZSI Library continues to be a useful resource for members and was a great hit with delegates at the ANZSI Conference.

ANZSI Indexing Awards

At its meeting on 26 June 2023, Council noted that only two nominations had been received for the ANZSI Indexing Awards including the John Simkin Medal. After some discussion, Council agreed to defer the awards until 2024. Both nominations were retained for the 2024 awards.

The 2024 announcement about the ANZSI Indexing Awards was distributed to members and advertised widely to the publishing profession on 30 May 2024, with a closing date of 31 July. I am pleased to say that 6 nominations were received.

Accreditation

ANZSI had received 2 applications for Accreditation as at 30 June 2024. One previous application for Accreditation was in progress, however the applicant withdrew their application.

Proposed ANZSI Scholarship

Arising out of discussion at the ANZSI Conference, an ANZSI Scholarship is under consideration by Council. It is envisaged that the scholarship would provide financial support for a student undertaking one of the internationally recognised indexing courses: the University of

California, Berkeley Extension course (Indexing: Theory and Application); the Society of Indexers (SI) course; the American Society for Indexing (ASI) course. The scholarship would be open to ANZSI members and other Australian and New Zealand residents. The scholarship would also include one year's membership of ANZSI. An ANZSI Indexing Scholarship Committee is working on procedures and criteria in preparation for Council endorsement and a formal announcement.

ANZSI/Charles Sturt University Wikimedia Project

An exciting initiative this year was the Wikimedia Library and Information Science Project. This project aims to identify and fill gaps in library and information science (LIS)-related content, including indexing, on Wikipedia, Wikidata and other Wikimedia platforms. For this project Mary Coe, ANZSI Vice President and Education Officer, is the Wikimedian in Residence (WiR) at ANZSI and support for the project is provided by ANZSI and the School of Information and Communication Studies at Charles Sturt University (CSU SICS). Capacity building is a major goal, with opportunities for ANZSI members (professional indexers) and CSU SICS (information studies/librarianship) students to develop their skills in Wiki editing. Fortnightly project meetings have been held via Zoom, facilitated by Mary Coe, Sherrey Quinn and Pru Mitchell (Manager Information Services at the Australian Council for Educational Research (ACER) and a Wikimedian).

A Wikipedia Working Party has been established by Council to provide updated content for the ANZSI Wikipedia page so that it can be updated by an appropriate editor.

Group activities

A post-conference lunch for conference attendees was held in Ballarat a few weeks after the conference. In March there was another social meeting in Ballarat of local members and Sherrey Quinn who was visiting. A lunch for Victorian members was also held on 1 February in Melbourne.

The NSW group met for lunch on 18 April 2024 in Blaxland.

International Committee of Representatives of Indexing Societies (ICRIS)

ICRIS held online meetings on 6 September 2023 and 12 April 2024.

In addition, an informal meeting was held at the ASI conference (5–6 June 2024). Highlights from the online meetings included the new distribution model for *The Indexer* –

quarterly issues online with an annual print volume and support for the continuation of two ICRIS online meetings annually, with other meetings in conjunction with face-to-face conferences where possible.

ANZSI has put forward a proposal for opportunities for indexing research and a grant to support this, possibly in conjunction with affiliated indexing societies. Discussion will continue at the next ICRIS meeting in October.

Voluntary work continues on the scope and specifications for an index to *The Indexer*. ANZSI's suggestion to pay a professional indexer to bring the index up to date was not supported by ICRIS representatives.

A draft of a new international indexing website, funded by ANZSI, has been developed and will be circulated to ICRIS members for its October meeting in China.

Mary Coe represented ANZSI at the Indexing Society of Canada/Société canadienne d'indexation (ISC/SCI) Conference online (31 May–1 June 2024) and Frances Lennie represented ANZSI in-person at the American Society for Indexing (ASI) Conference (5–6 June 2024).

Kerryn Burgess has been appointed by Council as its representative at the 2024 International Symposium on Indexing and the Annual Meeting of the China Society of Indexers (CSI) to be held on 25–26 October 2024 at Peking University, Beijing.

Council and committees

Shirley Campbell served as Vice-President until October 2023 when Mary Coe took on the Vice President's role together with her responsibilities as ANZSI Education Officer.

Susan Pierotti was appointed to a new role in ANZSI – as ANZSI IPEd Liaison Officer – to pursue ongoing liaison between the Institute of Professional Editors (IPEd) and ANZSI. Some areas of mutual interest canvassed include the Wikimedia Australia project, adding ANZSI information to the IPEd blog, referencing between IPEd and ANZSI Facebook pages and a possible professional development session on indexing for IPEd members in coming months.

Shirley Campbell administered the ANZSI indexing Awards and the Accreditation program.

Frances Lennie was welcomed as the ANZSI ICRIS International Liaison Officer. The role includes monitoring the email list, representing ANZSI at international conferences and providing reports and liaising with ANZSI Council on international matters raised by ICRIS. The term of appointment is for three years to coincide with the ICRIS formal triennial meeting.

Acknowledgements

This reporting year Council noted with sadness the deaths of ANZSI members Jeanne Rudd and Michael Ramsden.

I would like to acknowledge with gratitude the work of all the Council members, the Executive, ANZSI Officials and members of our various committees.

A special thanks also to ANZSI Treasurer Michael Wyatt who is stepping down from the role.

Shirley Campbell continued to provide valuable support for the ANZSI Indexing Awards and the Accreditation process.

Elisabeth Thomas, as usual, has continued to helm the *ANZSI Newsletter* with great expertise.

I thank Glenda Browne who took on the responsibility for Membership Secretary this year and continues to manage our ANZSI Facebook page and thanks also to Jenny Browne, our Communications Officer.

And I thank Mary Coe for her roles as Education Officer and Vice President.

A huge debt of gratitude also to Sherrey Quinn as ANZSI Secretary and Karen Gillen as ANZSI Accounts Officer and Library Officer.

SECRETARY'S REPORT

Sherrey Quinn, Secretary

Council membership 2023–24

President	Madeleine Davis
Vice-President	Shirley Campbell (1 July 2023 to 19 October 2023); Mary Coe (from 19 October 2023)
Secretary	Sherrey Quinn
Treasurer	Michael Wyatt
Council members	Sharon Betridge; Shelley Campbell (from 19 October 2023); Shirley Campbell (from 19 October 2023); Susan Pierotti (from 19 October 2023); Elisabeth Thomas

Officials of the Society

Membership Secretary	Nikki Davis (1 July 2023 to 31 July 2023); Glenda Browne (1 August 2023 to 31 May 2024); Karen Gillen (from 1 June 2024)
Editor of the <i>ANZSI Newsletter</i>	Elisabeth Thomas
Accounts Officer	Karen Gillen
Communications Officer	Jenny Browne
Education Officer	Mary Coe
Accreditation Receiving Officer	Shirley Campbell (1 June to 19 October 2023); Sherrey Quinn (19 October 2023 to 30 June 2024)
ANZSI Indexing Awards Receiving Officer	Shirley Campbell assisted by Sherrey Quinn
ICRIS (International Committee of Representatives of Indexing Societies) representatives	ANZSI ICRIS representative: President, <i>ex officio</i> (Madeleine Davis) ANZSI ICRIS international liaison: vacant until 5 November 2023; Frances Lennie from 6 November 2023
Library Officers	Australia: Karen Gillen; New Zealand: Carol Dawber

Committees and special volunteers

Accreditation Committee	Sherrey Quinn (Chair), Madeleine Davis, Karen Gillen, Jean Norman and Shirley Campbell (Receiving Officer)
ANZSI Indexing Award – John Simkin Medal 2024 Committee	Madeleine Davis, Tracy Harwood; Susan Keogh
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

Council meetings

There were 6 Council meetings held by teleconference: 30 October 2023, 5 February 2024, 8 April 2024, 10 June 2024. The final meeting of the 2023–24 Council was held on 12 August 2024.

Minutes and documents are in then members' Area of 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 2023–24 was held on 29 August 2024 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

Revenue

Revenue was generated primarily from the Society's regular sources of income (i.e., membership subscriptions, *Indexers Available* fees, and investments) plus the 2023 conference fees.

Expenses

Principal expenses are for payments associated with website management and maintenance fees; ANZSI officers; bank fees, accounting fees and auditing fees; insurance fees; plus 2023 conference costs, including travel rebates for members attending. Council's policy is to spend money for the benefit of members, particularly on website, newsletter and communications, conferences and professional development.

Assets

At 30 June 2024, the Society held assets of AU\$107,952.35.

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

NOTES TO AND FORMING PART OF THE FINANCIAL STATEMENT FOR THE PERIOD ENDED 30 JUNE 2024

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 2024.
- 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 2024, 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 2024 and of the results of its operations for the period ended 30 June 2024.
- b) in accordance with applicable Accounting Standards; and
- c) in accordance with the provisions of the Association Incorporation Act.



Signature of Auditor

19/07/2024

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 2024;
- 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 2024; 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.

Signed by Secretary

Secretary

MELBOURNE

12 / 8 / 2024

Signed by President

President

MELBOURNE

12 / 8 / 2024

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 2023 to 30 June 2024

CASH INFLOWS

Jul 2022 - Jun 2023	ITEM	Jul 2023 - Jun 2024
\$190.00	Accreditation Fees	\$95.00
\$1,286.17	Bank and Investment Interests	\$979.18
\$0.00	Conferences	\$5,645.00
\$1,369.91	Indexers Available Fees (Inc NZ)	\$1,314.05
\$6,110.94	Membership Fees (Inc NZ)	\$6,445.23
\$101.07	Publications / Newsletter	\$104.44
\$0.12	Sundries	\$0.00
\$0.00	Training	\$780.00
\$9,058.21	TOTAL	\$15,362.90
	Transfers from other accounts	

CASH OUTFLOWS

Jul 2022 - Jun 2023	ITEM	Jul 2023 - Jun 2024
\$0.00	Accreditation Costs	\$14.50
\$966.50	Accounting / Auditor / Consulting / Insurance	\$2,735.00
\$0.00	Advertising / Awards/ Gifts / Promotion / Publicity	\$305.50
\$653.90	Bank Fees / Merchant Fees	\$817.05
\$250.00	Conference Costs	\$6,679.28
\$644.96	Email	\$699.23
\$317.51	Library Costs / Printing / Postage and Stationery	\$318.19
\$632.58	Miscellaneous Expenses	\$0.00
\$0.00	Professional Development & Networking Costs	\$372.46
\$0.00	Special Projects	\$4,720.91
\$3,000.00	Subcontractors ANZSI Officers	\$2,375.00
\$230.89	Teleconferencing	\$246.89
\$0.00	Training Expense	\$633.68
\$2,413.00	Website Costs	\$2,051.30
\$9,109.34	TOTAL	\$21,968.99
	Transfers from other accounts	

NET CASH FLOW for the period (\$6,606.09)

ASSETS NZ Currency Conversion (\$410.13)

30-Jun-23	ITEM	30-Jun-24
\$46,057.32	Westpac Cheque Account	\$23,464.69
\$2,748.39	Westpac Community Solutions Account/Paypal	\$383.04
\$62,657.68	Term Deposit - ME Bank	\$77,802.86
\$3,384.37	Cash at Bank (New Zealand Account)	\$3,283.01
\$2,175.18	PayPal	\$3,018.75
\$117,022.94	TOTAL	\$107,952.35

MEMBERSHIP SECRETARY'S REPORT

Membership Secretary: Nikki Davis, 1 July 2023 – 31 July 2023; Glenda Browne, 1 August 2023 – 31 May 2024; Karen Gillen, 1 June 2024 – 30 June 2024

Membership fees

The Society has a single subscription period covering the financial year (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 2023 – 30 June 2024

	Individual membership	Institutional membership
Australian members	AUD90	AUD115
New Zealand members	AUD68	AUD115

Membership statistics

At 30 June 2023, ANZSI had a total of 80 members, of which 22 were Accredited Members. There were 38 members with an *Indexers Available* listing.

Table 2. Membership figures at 30 June 2024

Location	Life Memberships	Institutional Memberships	Personal Memberships	TOTAL Membership
Australia	5	3	65	73
New Zealand	0	0	6	6
United States	0	0	1	1
TOTALS	5	3	72	80

Table 3. Breakdown of Life and Personal membership figures

Location	No of members	Indexers Available listings	Accredited Indexers
ACT	10	6	5
NSW	18	10	8
NT	1	0	0
QLD	7	1	0
SA	4	2	0
TAS	3	2	1
VIC	19	10	6
WA	3	2	0
New Zealand	6	5	2
United States	1	0	0
TOTALS	72	38	22

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 2023–2024 financial year there were no formal requests for access to the Member Register.

Indexers Available

Members were charged an annual fee for a listing in *Indexers Available*, due 1 July. A one-month period of grace applies, after which entries for members who have not paid are deleted from the directory on the ANZSI Website.

Table 5. *Indexers Available* annual advertising fees, 1 July 2023 — 30 June 2024

Country of residence	Fee
Australian members	AUD35
New Zealand members	NZD33

At 30 June 2022 there were 38 members with an *Indexers Available* listing (see Table 3 above for details).

NEWSLETTER EDITOR'S REPORT

Elisabeth Thomas, Newsletter Editor

Issues of the ANZSI Newsletter were published in August, October and December 2023 and February/April and June 2024. Copy for the newsletter is always sought and thanks are due to ANZSI members who do contribute.

COMMUNICATIONS OFFICER'S REPORT

Jenny Browne, Communications Officer

The Communications Officer manages communications with ANZSI members (mass mailings via Mailchimp), and contributes to social media posts and preparation of the newsletter.

There have not been major changes to the Communications Officer role in the past year, though Facebook's *Insights* feature has changed once again – yearly data is no longer available.

Over the last year on Mailchimp, emails with the highest open rate (80+%) related to membership renewal, indexing job opportunities and the ANZSI newsletter.

ANZSI LIBRARY OFFICERS' REPORT

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

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.

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. Items forming the Australian collection are currently held in Melbourne and Canberra. ANZSI members may borrow from the collection held in their country of residence. The library operated continuously throughout the reporting period, despite rolling lockdowns in various Australian states.

Promotion

The ANZSI Conference, 'Making Connections', held on 19–20 October, 2023, at Charles Sturt University's Wagga Wagga campus provided the perfect occasion to promote the Library to members. A large number of books and journals were displayed and delegates were able to browse the collection between conference sessions.

Loans

The texts for the UCB online indexing course were borrowed by a member enrolled in the course, and a number of newer and not-so-new members took the opportunity to enhance their professional development by borrowing instructional books from the library. Nevertheless, Denis Duncan's *Indexing, A History of* also continued to be much sought after. Delegates at the conference at Wagga Wagga seized the opportunity to borrow a large number of books or added their names to waiting lists for popular items.

Acquisitions

Purchases

No items were purchased during the reporting period.

Donations

Books. Life Member, Alan Walker, generously donated a large number of items from his personal library. This included a number of rare and valuable additions to the library as well as duplicates of popular books already held in the collection.

Journals. The library already held all copies of *The Indexer*, from the first issue in 1958 through to the last issue of 2018. Over the reporting period, members donated more recent issues, from Vol 37(2) 2019 to Vol 39(3) 2021, as well as duplicates of items already held.

Newsletters. The Library already held a full set of original published copies of both the *AusSI Newsletter* and the *ANZSI Newsletter*. However, a member donated her meticulously kept personal set from 2009 to 2013. A large number of these were used to replace those already held by the library that were in poor condition.

Giveaways and gifts

As the Library has grown via donations, multiple copies of some items have been amassed. A number of surplus books and journals were offered for free to delegates at the ANZSI Conference at Wagga Wagga. There were also a number of general interest books among those donated by Alan Walker that were added to the display of free books and journals. Almost all were taken at the end of the conference.

The most-recently-joined ANZSI member attending the conference was presented with a copy of Glenda Browne and Jon Jermey's *The Indexing Companion* (CUP, 2007).

End of ANZSI Annual Report for 2023–24