

Conference 2018: Change and continuity

University of Lancaster, Bailrigg, Lancaster LA1 4YW

9–10 September 2018

Conference reports

Prepared by Chris Bailey, Kim Birchall, Rosi Dear, Melanie Gee, Jody Ineson, Philippa Jevons, Nicola King, John Silvester, Helen Taylor and Janet Zimmermann

The 2018 conference was held alongside the SfEP conference to enable indexers to network with editors and proofreaders, particularly during the drinks reception and gala dinner on the Sunday evening. In addition, a joint plenary session was included in the programme, covering issues of interest to members of both societies. Feedback suggests that parallel conferences have some advantages, and should take place from time to time, but that the imbalance in the sizes of the two conferences can lead to members feeling rather overwhelmed by the larger group.

SATURDAY 8 SEPTEMBER

Around a dozen SI members arrived a day early, some with awkward journeys, some with joint SI/SfEP membership who were attending SfEP sessions the next day, and some students/newly qualified members who were booked on Ann Hudson's pre-conference workshop, 'Taking the plunge', on the Sunday. SfEP members were very much in the majority at dinner, but nonetheless the SI contingent made their mark felt, with several members being part of the winning team in the after-dinner quiz.



SUNDAY 9 SEPTEMBER

Prior to the first formal conference session, and to make allowances for members arriving later in the afternoon, there were opportunities for informal networking in small groups discussing a number of ethical issues in indexing. Rooms had also been set aside for members to discuss tips and tricks associated with the three main indexing programs, but this proved less successful than anticipated, though Cindex users appreciated having Frances Lennie on hand to deal with their queries.

Silicon words: the marriage between linguistics and computing (Professor Tony McEnery)

The first plenary session of the conference was a talk by Professor Tony McEnery, the director of the ESRC Centre for Corpus Approaches to Social Science and Distinguished Professor of English Language at Lancaster University. He was involved with the creation of the British National Corpus in 1994 and its updating in 2014.

Professor McEnery outlined what corpus linguistics can achieve – computers can deal faster and more accurately with corpora consisting of millions of words than humans can. They are therefore better at picking out tendencies and distinguishing what's normal and typical from what are rare and exceptional uses. He is particularly interested in using the results of corpora analysis in socially relevant ways, hence their use in developing predictive text for mobile phones and the drop-down lists of suggestions which appear when searching on Google. However, he did concede that computers have their limitations, as they are nowhere near as good as humans in dealing with spoken language.

There are various kinds of corpora – multilingual, parallel, learner and historical/diachronic. Professor McEnery's other main interest is in the language of the 17th century, though as he pointed out, there are not many speakers of 17th-century English about, except perhaps Jacob Rees-Mogg, who he described as the MP for the 17th century.

This session was an extremely informative and entertaining opening to an informative and entertaining conference.

Drinks reception and gala dinner

The main social and networking event of the conference was the gala dinner, held in the Great Hall, and preceded by a (rather crowded and noisy) drinks reception. As a networking event, it was certainly successful, as these photos illustrate.



And we also had the opportunity, at last, to hear our President, Sam Leith, give an after-dinner speech – a pleasure denied us for the past three years for a variety of reasons. Thanks Sam – you did us proud and flew the flag for indexing to an audience dominated by editors and proofreaders.

MONDAY 10 SEPTEMBER

Monday morning was devoted to workshops and seminars, with members choosing between one workshop or two one-hour seminars.

Managing client relations: negotiation, scheduling, crisis management (*workshop led by Ruth Ellis*)

The Client Relationship Management workshop was led by the energetic and inspiring Ruth Ellis, and the two hours flew by. We considered the sales and marketing process from the client's point of view, from their first hearing about us to the point where they're so pleased with our indexes, they keep coming back, and recommend us to all their friends and colleagues.

We identified the kinds of clients we come across: authors, publishers of books and journals, packagers etc., and discussed the negotiation of price, time available and quality of index, bearing in mind possible repeat business. Problem management was covered, including disaster recovery; experienced participants emphasised the importance of a 'disaster buddy', who can liaise with clients if we get rushed to hospital (or

worse). Problems with technology were also discussed, with the emphasis on good back-up and allowing for internet issues.

Being paid on time, and what to do if we're not, was another topic of discussion, as was ways of increasing our business, by encouraging clients to pay for a higher level of service or offering them extra areas of expertise.

The workshop was rounded off by an examination of client-value, with a suggested scoring system based on revenue, payment time, enjoyable subject matter, etc.

As well as re-invigorating my marketing drive, the workshop left me with two practical intentions: I have a friend lined up to be my disaster buddy (not that he knows it yet!); and when I have enough clients, I will score them to see if they're worth keeping.

Getting to grips with Index-Manager (workshop led by Jan Rayment and Wendy Baskett)

The two-hour workshop provided an overview and a practical introduction to the latest embedded indexing software (Index-Manager). We had been contacted before the conference with guidance on how to download and install the program and given example files to use. Jan and Wendy guided the participants as we followed examples on a PowerPoint presentation, with lots of hands-on keyboard time for the exercises.

The software is the user-friendliest embedded program that I have used; having said that, it still requires an investment of time and experimentation to gain a good working knowledge of. Both Jan and Wendy provided insights from their use of Index-Manager and imparted knowledge of some of the 'tricks' to get the best results.

Given the breadth and depth of the subject, two hours is only enough to scrape the surface; however, by arranging an extended demo period for the program, and armed with handouts, the organisers gave the participants the opportunity to follow on with some private study.

The providers of Index-Manager also run webinars and there could be scope for further SI workshops or a support network of users in the future.

Thanks to Jan and Wendy for an interesting and helpful workshop.

Another string to your bow: editing and proofreading (workshop led by Michèle Clarke-Moody)

As the SI and SfEP conferences were co-located at Lancaster in 2018, affording the opportunity to chat with editors and proofreaders and compare notes on our working lives, it felt particularly appropriate to undertake Michèle Clarke Moody's workshop with its more structured overview of our 'sister' professions.

Michèle, with the insight born of many years' experience, led a group of five participants through the basics first of the copy editor's role and then of the proofreader's, in a well-paced two-hour session. She included brief and entertaining exercises in spotting and correcting errors in text, one of which introduced basic proofreading marks.

The dual roles, competing for the copy editor's attention, of preparing the text for the reader (checking for clarity, accuracy, grammar and style) and for the typesetter (inserting necessary tags or codes) were highlighted, and we were given a particular window onto the editor's headache that is bibliographic reference styling.

Michèle also provided plenty of information on training available – and a salutary warning about the quality of some.

Overall, this was a good-length introductory workshop demystifying the copy-editing and proofreading processes and their place in book production, and valuable in helping indexers to decide whether expanding their skills in these directions might suit their aptitudes. Thanks to Michèle and my fellow participants for an enjoyable and enlightening morning.

The good, the bad and the ugly: looking at published indexes (seminar led by Ann Hudson)

Ten of us gathered for this session evaluating published indexes. The attendees included indexers with varying levels of experience, ranging from those who have been indexing for years to students on the training course.

To start with the whole group looked at an index supplied by Ann; we were asked to identify its bad points. We soon came up with a list of faults, including turnovers that were not indented, leading to a confusing layout; a lack of cross references; too many subheadings, and important topics being listed as subheadings rather than having their own main heading.

We then split into smaller groups to look at indexes that we had brought with us. It was interesting to see a range of different indexes and discuss them between ourselves. One index had far too many subheadings, including an entry for the metatopic that had over 20 subheadings as well as a similar number of *see also* references. Another index used a lot of space listing obscure acronyms (my favourite being BMW – bitching, moaning, whinging!)

We then reconvened as a large group to compare our findings and look at another index supplied by Ann. This one had very long strings of locators and failed to include the important topics and subjects. Ann made the comment that as a user she had found it very hard to use the index to find what she wanted, so much so that she had had to compile her own index entries for the book!

This was a very useful session. It was helpful to see examples of ‘bad’ indexes, and to discuss their shortcomings with other indexers and to have the benefit of Ann’s expertise. It certainly gave us lots to think about as we compile our own indexes.

Once an indexer, always an indexer? (seminar led by Joan Dearnley)

‘Once an indexer, always an indexer’, led by Joan Dearnley, was a session primarily for those indexers who were considering retirement, but as someone who intends to cut back on work temporarily, I was interested to hear about clients’ responses to a change in workload.

The initial question was whether to slowly wind down or stop abruptly. When one indexer suggested to a client that she was doing the former, she received an unexpected gift of a hamper to mark her retirement. So perhaps it is preferable to refer to oneself as ‘semi-retired’.

For many indexers, there is a gradual turnover of clients, and so a more passive way of retiring may be to stop replacing old clients with new. However, some indexers have been working with the same commissioning editor for decades, so it may be some time before these working relationships reach a natural conclusion.

Discussion moved on to the reasons for retiring from indexing. One consideration is the recent changes in technology. Some of today’s more senior indexers successfully navigated their way through the previous ‘revolution’ – from cards to computers – and are unwilling to invest the same amount of time and effort through the current one, of eBooks and embedded indexing.

Another reason for wishing to move on from indexing is the amount of time one is required to sit still during the working day. As freelancers working from home, we have to take responsibility for our own exercise schedule, much of which – if we're honest – involves frequent trips to the kitchen.

However, when asked if money was no object, most people in the discussion agreed that they would wish to keep indexing from time to time at least. The concentration, analytical thinking, and memory required to produce an index are excellent ways to keep the mind active. On the other hand, few would wish to take on a book of more than around 500 pages.

There was some doubt as to the legal nature of working for a single client – i.e., does this still count as self-employment? The conclusion was that being listed (at no extra cost for professionally qualified indexers) on the freelancer directory would probably solve this problem.

For many, while the workload may start to become tiresome, the social side of indexing can be maintained through conferences and local group meetings. Many stressed that they did not wish to lose out on this. The SfEP have a 'Retired Membership' scheme for just that purpose, and likewise we should consider that retired indexers may like to be kept informed of meetings and discussions, as well as being a valuable source of knowledge and experience for newcomers to the profession.

The final few minutes of the conversation turned to lifestyle in general, and what activities indexers participate in outside of work. It was apparent that some enduring hobbies were initially inspired by indexing a book on them, e.g., beekeeping. A brief survey of the people in the room revealed that indexers have a wide variety of interests, and retirement certainly allows more time to spend on pursuing these.

In summary, most indexers would rather cut down than stop working altogether, which justifies the title of the workshop. To do so requires careful management, but is worthwhile for achieving a fulfilling work-life balance.

Marketing the profession: think local (*brainstorming session led by Ann Kingdom*)

Ann Kingdom's brainstorming session was about raising the profile of the Society. Its purpose was to generate ideas on how we can encourage people to join the profession. To this end she had herself run a workshop at the 'Off the Shelf' festival of words in Sheffield and given talks at University College London (UCL) as well as SfEP conferences. She had adapted material which had been utilised before for this purpose (copies were provided as a handout). Jan Worrall then talked about the virtues of *Powerpoint*, which she had used to give a talk on indexing to the U3A. She said it would be a good idea to create a Society template for such use. All those present agreed that there is a need to train people on how to give talks and develop workshops. There are huge potential audiences around the country: literary festivals are a new growth industry for example, and talks to SfEP local groups can be fruitful. In addition, there is the medium of local radio, which has possibilities. Everyone agreed that there is always a difficulty in getting people to do things. Perhaps local groups could be persuaded to discuss the issue more; there was a need for members to do more locally to publicise indexing. People on the whole don't know that indexing is a job that people actually do. Someone suggested a standard template letter for universities could be created.

How I index (*seminar led by Moyra Forrest*)

Conference delegates with a wide variety of indexing experience were present for this session on 'How I Index', from brand new students to full-time tagging or embedding specialists. Ideal conditions for an informal discussion led by Moyra Forrest, starting with a blow-by-blow description of the method by the most experienced of us, then expanding out into questions and diversions from others so that all topics were covered.

We began with pre-indexing preparation: the importance of a skim read, making notes based on first impressions, subject knowledge or from indexes from books on similar subjects. How much subject knowledge is necessary? Do we print out the whole book, just the index or nothing at all, just working on-screen? What are the differences between tagging and embedding and how do they change our methods? What software do we use? Do we input from the beginning and keep going without surfacing and edit at the end, or go chapter by chapter and assess as we go? A number of us start indexing at chapter 2, after reading the introduction and last chapter to familiarise ourselves with the text. One person evaluates their terms at chapter 3 in case new terms or subheadings need to be created. Some found mindmaps for terms and concepts to be a useful aid, created on paper or using a dedicated program. All the working indexers had found their own way to make notes, either as a separate file or by using functions of their software, such as labelling; this was also true of finding typos or editor queries.

The importance of communication was emphasised: with editors and authors about queries and errors in the text, including negotiation or making a case about an element of the index, and also with colleagues for quick questions and support. Sideline was praised, but also making personal contacts at local meetings and conferences.

Next we approached administration, fee negotiation using different methods of working out rates (hourly rates are not a preference) and time management (plan a minimum amount a day, decide when to edit – as you go or at the end). Indexing more than one book at a time is possible if well planned out and can provide a useful break when one subject is too heavy.

The main conclusion was to find a way to work to suit you and your situation and preferences. There were numerous instances of the use of the indexers' motto: 'It Depends!'. Advice was to use your colleagues, they are a fount of knowledge and personal help, keep up with new technology and techniques even if you're not using it personally, and overall: Don't Panic.

Many aspects of indexing were discussed and I think everybody learned something, even if it was just about their colleagues. The opportunity to share and ask questions face to face is invaluable.

AGM and Society Matters (chaired by Ann Kingdom)

The AGM marked Ann Kingdom's retirement from the Executive Board and from her role as Chair; her successor will be elected by the new Executive Board at their autumn meeting. As in previous years, the AGM was over in less than half an hour (minutes on the SI website), leaving plenty of time for discussion of 'Society matters', which this year focused on conference timing and content, including reactions to running our conference alongside that of the SfEP.

Plenary (with SfEP): The evolution of publishing outsourcing and what this means for you (Kathryn Munt, Publishing Training Centre)

Kathryn has recently become the Chief Executive Officer of the Publishing Training Centre. She has spent time working with a publishing outsourcer in India and can see and appreciate some of the issues that the move by big publishers towards greater use of outsourcing may have for editors, and indexers, in the UK.

She first showed some good news: the value of UK publishing has been increasing and is robust. Non-fiction and academic books account for 58% of the value of UK publishing. The overall amount has been increasing, and physical books still account for 85% of the value of publishing. Digital output accounts for a large proportion of journal and reference publishing.

Moving on to the evolution of outsourcing in publishing, Kathryn showed that it had traditionally been focused on production and delivery of products but has recently been moving more into the 'upstream'

phase of commissioning, briefing, writing and editorial activities. Large publishing companies use outsourcing to reduce costs, free up their own resources, allow them to access skills and capabilities they don't have, to do things that are too difficult for them to do themselves and to share the risk of developing new products and services.

An extreme case study showed that the outsourcer (sometimes called the vendor) can become the publishing company, taking on roles that were traditionally kept in-house. In such a scenario, the UK-based publisher is responsible for customer engagement, market research, concept development, financial approvals, sales and marketing, brand management and the customer experience. Everything else to do with making books, or other publishing-related products, is moved to one or more outsourcing companies. Each outsourcing company may employ other outsourcing companies that can provide specific functions. Each layer of management places another barrier between the publisher and the freelancer.

Outsourcers have expectations of freelancers, sometimes without investing the time and money to develop the freelancers to the level required. Expectations include: knowing how to work with the publisher, being flexible to new ways of working, being open to the vendor's perspective, quick to learn to work remotely and adaptable to new technologies, being willing to be part of the 'ecosystem' of vendors contributing to the project, and finally, being proactive (whatever that means).

There are some areas of this brave new world that need to be addressed with editors and indexers in mind. We, as freelancers, need to find points that can be leveraged to our advantage. The publishers are looking for good quality products and expect the outsourcers to find reliable workers who can fulfil their expectations. The vendors are under pressure to deliver quality at a low price. However, freelancers can choose to work elsewhere if the rates are too low. This may in the long term impact on the quality of the products and reflect negatively on the outsourcers.

Some outsourcers have invested in new technological systems to improve efficiency, but it can take a while to learn these systems from the point of view of the freelancer. Organisations such as the PTC can help bridge the gaps between the freelancer and the outsourcer. There needs to be dialogue with the outsourcers so that professional editors and indexers in the UK can continue to work with UK publishers, despite the managerial roles being outside the publisher's headquarters.

[Since the conference, Nicola King has started to liaise with Kathryn over sharing information about our members' concerns and issues in this brave new world with a view to contributing to any working groups or parties that might be formed.]

The digital revolution and ebooks *(Jan Worrall and Paula Clarke Bain)*

Speaking to a full room, Jan kicked off this final session by highlighting research comparing reading from screens to reading from print. Rather worryingly, all that skim reading and bouncing around the text was found to impact our brain plasticity and empathising ability, and our deep reading skills. Similarly, when we index from screen, do we 'engage' with the text less? And does this matter anyway? A topic for another year maybe – this time the focus was e-books and indexes, so Jan moved swiftly on to unpacking, or literally, unzipping an e-book to take us on a tour inside.

With e-books, users will expect to click on an index entry and land in the right place in the book. As the text is 'reflowable', the page numbers aren't fixed. Therefore the index locators need to be active hyperlinks, ideally linking to exactly the right words/sentences. This is possible using embedded indexing. (Of course we can, and do, create embedded indexes for other reasons.)

Jan listed the embedded indexing software tools available and briefly showed us DEXembed and Index-Manager. She also provided an accessible, whistle-stop tour of the different types of XML that underlie

different publishing formats. It helped me understand why Word has a tendency to misbehave – the coding behind it is very complicated!

For completeness, Jan also outlined how publishers (or third parties) actually convert the files to e-books. Of particular note was that Amazon's self-publishing platform (Create Space) rather unhelpfully causes links to get deleted.

Jan concluded by encouraging us to 'embrace the e-book challenge'. Part of this challenge was to educate publishers that (a) yes, e-books do actually need indexes, and (b) yes, it is possible to produce embedded, linked entries! The ASI Digital Publications Special Interest Group (which we were encouraged to join) has some materials on its website to support us in this education role. Paula explained that several SI members, including herself and Jan, are members of this SIG and have been involved in developing these documents, copies of which were handed out (and will be available on the SI website).

An indicator of a successful (entertaining, engaging and stimulating) final session is when tired conference-goers stay firmly rooted to their seats, laugh in all the right places and are disappointed when the session draws to a close. This session certainly ticked all the right boxes.

And finally ...

Over three-quarters of participants completed the online feedback survey, the majority rating the conference as 'good' or 'excellent', including not only the programme but also its value for money. And looking ahead, around 70 percent expected to come to the next conference, regardless of whether it is held in London or Birmingham and whether it is a one-day event or residential. [Negotiations are currently in progress for a residential conference in London.]