

The Society of Indexers had a successful year in 2008, building on the previous year's achievements in developing internet resources and looking confidently to the future by launching two major initiatives. Working parties were set up, one to examine possibilities for making the next edition of the training course available online, and the other to overhaul the membership and qualifications structure. Members' views have been canvassed via online surveys and used to guide priorities and planning. The Society's website provides an increasingly valuable resource to promote SI and indexing in general, while developing facilities for members. The Society continues to face the future with optimism and to assert and promote the value of indexing in the electronic age.

## **ADMINISTRATION AND MANAGEMENT**

### **Annual General Meeting**

The 51st Annual General Meeting was held at Winchester University on 12 July 2008 during the annual conference. Eighty-three members of the Society attended the meeting. The Annual Report and Accounts for 2007 were received. There being no other nominations the following were elected to the Executive Board for the period 2008–11: Hilary Faulkner, Adele Furbank, Jan Worrall. The reappointment of Westons of Sheffield as reporting accountants to the Society was approved. A query was raised regarding the appointment of a new Chair of the Executive Board following the retirement of Sue Lightfoot. According to the SI Articles of Association the Chair and Vice-Chair are now elected by the Executive Board from among its members.

### **Executive Board**

The Executive Board (EB) met four times in 2008, in February, April, July (at the annual conference) and October. A telephone conference also took place in June. Directors' attendance at meetings is close to 100 per cent. Ann Kingdom took over the Chair of SI from Sue Lightfoot after the AGM and continues to carry the brief for marketing until a replacement can be found. James Lamb was elected as Vice-Chair. Paula Peebles resigned from the Board early in the year and Jan Worrall was coopted to take her place as Director for Professional Development. Wendy Simpson was coopted onto the EB in November.

A summary of minutes of all meetings was printed in *Sidelights* and posted on the website. In June the Board decided that in the light of recent developments in the quality and rigour of the Training Course, only those with an SI qualification should be eligible for inclusion in *Indexers Available* from 2012. In April and June concerns expressed by members on the display of results in subject

searches in *Indexers Available* were noted and discussed. An e-survey was prepared to discover members' views on proposed changes to the order of display and the results of this presented at the conference in July. Further discussion prompted the establishment of a working party to re-examine SI membership structure and qualifications. Executive Board meeting agendas included consideration of online membership renewal, promoting SI-Announce as an effective means of communication with the membership, the revision of the training course, indexing standards and a legal assistance scheme for members. It is still the aim of EB to achieve charitable status as soon as time allows.

**Finance:** The Society's finances remain on a stable footing. We aim to maintain a minimum financial reserve equivalent to the income from one year's membership fees and, despite a reduced net surplus in 2008, our reserves remain above this minimum. This puts us in a good position to meet the anticipated development costs of the new edition of the training course, due to be introduced in early 2010. From January 2009 the EB is adopting a more rigorous budget planning process to ensure that in-year spend is closely monitored.

### **Consultative Council**

The Consultative Council (CC) met in May and November. It is always well attended; group representatives send a deputy if they find it impossible to attend so that it is rare for a group to be unrepresented. The Society's committees are always represented, which means that the Council is in direct contact with each committee. The CC email group enables groups and committees to stay in contact between meetings. The Chair passes matters from the Council to the Executive Board and reports back to the Council about Executive Board meetings. Jane Coulter resigned as Chair in November and Janet Reed was elected to replace her, with Cath Topliff taking over as Vice-Chair from Janet Reed.

During the year, the Council receives news from the Executive Board and the various committees of the Society and so provides a means of disseminating information about Society matters and initiatives to the group members. This year, these topics included matters relating to the training course, the status of external training qualifications, especially BIPT, public liability insurance for group meetings and requests for contacts for the Marketing Committee

Topics initiated by the Council itself have included the possibility of the SI buying the BIPT course from Ann Hall if and when she should choose to sell the course, delays to schedules and the resultant effect on freelancers, negotiation, feedback on training course papers which

have been failed, the time limit for completing the training course, working for middlemen such as packagers, outsourcing, and how to widen the representation of members on the Council.

There is discussion about all these matters in the meetings and the views of the various groups are returned to the meeting or can be aired on the email discussion group. The results of these discussions are passed back to the Committee representatives and the Executive Board as appropriate. It remains desirable to widen the participation and representation of members by extending membership of local groups beyond the immediate area.

## **Groups**

Many of the local groups again had a successful year, meeting several times, remaining in email contact between meetings and sending representatives to the Consultative Council.

New members were welcomed by the group organizers and invited to group meetings. Each group was encouraged to keep its web page up to date and it is hoped that the details of future meetings will shortly be available in a website diary. Group memberships varied from single figures up to 50 or 60, with some members travelling long distances to meetings, although many groups vary their meeting locations to share out the longer journeys.

Meeting content varied considerably. Apart from 'social' meetings, at which indexing matters are generally discussed, peer reviews were again popular and were also being planned for 2009. Several groups have held SI workshops in local venues and others are arranged for 2009. This has proved a popular alternative to attending SI-arranged venues, reducing the cost of travel.

The Kent Group held a meeting examining the indexing software used by its members, the London Group examined an indexing program under development and the Yorkshire group had a presentation on indexing Chinese names from a member. The North East Group was visited by Max McMaster, for a talk and discussion on the ANZSI mentoring scheme and mentoring in general.

Several groups have met for visits, including the Yorkshire Group to the National Railway Museum's Search Engine (its Library and Archive Centre), the Three Choirs Group to the Bletchley Park Museum and Arley Arboretum, the Sussex Group to the village of Bosham, the West Anglia Group to the Cambridge University Press (including a talk on CUP-XML), the Kent Group to two gardens and the North West Group to Lancaster Castle. The London Group helped the Editor of *The Indexer* to represent Glenda Browne at the IgNobel Awards Tour Show at Imperial College and took the opportunity to promote indexing.

Meetings have been held in a variety of venues, including a community centre, pubs, hotels, members' homes, libraries and university facilities. Most groups have held a Christmas or New Year social event, usually well attended and often an event at which the year ahead is planned.

This year it was the turn of the Wessex Group to put on an excellent conference ('The Round Table') at Winchester. The Yorkshire Group has spent much of the year planning the 2009 Conference to be held in York in September. Thanks are due to everyone involved for making these conferences possible.

The special interest groups continue to be in email contact, some more than others, and the Medical Indexing Group sends a representative to the Consultative Council.

Those local groups which meet regularly, even if sometimes infrequently, continue to be a great strength to the Society and are highly valued by their members. All those involved in their organization are to be thanked for their hard work, as are the Consultative Council representatives who disseminate information from the Council and collect feedback from their groups.

2009 should see the groups continue successfully, sharing new ideas for meetings. Hopefully, it will also see the appearance (or reappearance) of groups in areas currently not served.

## **International Issues**

The next International Meeting, where the International Agreement is reviewed, was scheduled to take place in South Africa in March 2009, organized by ASAIB.

SI was represented by Pam Schofield at the 40th ASI conference in Denver, Colorado. Representatives of several of the other societies attended the SI conference in Winchester and took part in an informal meeting. Although the China Society of Indexers was not represented by a member from China, SI member Liquan Dai represents CSI through her position as Honorary Board Member of CSI.

Interest by other indexing societies in their members being able to take the SI training course has continued. Members of the other indexing societies can now take our course without becoming SI members. The training does not lead to Accreditation, but a Certificate of Completion is awarded.

## **Membership**

The total number of members was 658 (686 in 2007), including: 9 (9) Honorary, 36 (36) Life, 5 (5) Founder, 21 (25) Joint, 59 (60) Overseas, 31 (32) Over-70s, and 6 (4) Corporate. New members totalled 91 (127) and resignations and non-renewals 128 (136).

## **Office**

Our office staff, Wendy Burrow and Paul Machen, continue to provide a reliable service for members and keep the Society running. They have taken on further responsibilities in marketing, finance and administration to relieve the pressure on volunteers. Subscription management for *The Indexer* is now running smoothly under Paul's control. Wendy monitors compliance with the Data Protection Act and attended a seminar run by the Institute of Association Management to update her knowledge. On a day-to-day level, the introduction of

online banking has enabled direct payment of bills and expenses claims. The Society is moving towards the increasing use of email via SI-Announce for communication with members in order to save on the costs of printing and postage. Members without access to email will continue to receive communications by post.

### Other Organizations

In addition to strong links with all the overseas indexing societies, the Society maintained reciprocal arrangements with the Society for Editors and Proofreaders (SEEP), the Chartered Institute of Library and Information Professionals (CILIP) and the Institute of Scientific and Technical Communicators (ISTC). We also continued our membership of the Foundation for Science and Technology (FST), the Association of Learned and Professional Society Publishers (ALPSP), the Independent Publishers Guild (IPG) and the Professional Associations Research Network (PARN). All these relationships with other organizations not only help raise the public profile of the Society but also give access to specialized information and discounts on particular services, including conferences and seminars.

### AWARDS AND HONOURS

#### Betty Moys Prize

The late Betty Moys bequeathed a legacy to the Society to fund an award for a promising new indexer. The sixth Betty Moys Prize was awarded to Roger Bennett by SI President John Sutherland, at the Winchester Conference.

#### Honorary Life Members

Ken Bakewell, Hazel Bell, Geoffrey Dixon, Valerie Elliston, Oula Jones, Jean Simkins, Connie Tyler.

#### Wheatley Medal

The Wheatley Medal for 2008 was awarded to Barbara Hird for her index to *The Oxford history of literary translation in English, vol. 1: To 1550*, edited by Roger Ellis (OUP, 2008). Philip Hillyer was highly commended for his index to Bill Bell's *The Edinburgh history of the book in Scotland* (Edinburgh University Press, 2007) and Liza Furnival commended for her index to the World Health Organization's *Quality assurance of pharmaceuticals*. Publicity about the Wheatley Medal was distributed via *Sidelights* and through relevant websites and email lists, producing a good crop of submissions. The panel of judges (two indexers, two academics, two CILIP representatives) met in Sheffield under the chairmanship of Professor Peter Willett of Sheffield University and were pleased with both the quality and variety of the indexes submitted. The medal and certificates were presented by SI President Professor John Sutherland at the Winchester conference.

### INTERNET AND EMAIL

Internet and email communications are now essential tools for individual indexers and for the Society's communications. The [indexers.org.uk](http://indexers.org.uk) website is the public

face of the Society and is also used to provide information and services to members.

#### Internet Director

James Lamb was re-elected as Internet Director at the AGM.

#### Webmasters

Julian Menes became webmaster and listowner for the main website on 1 January. James Lamb continued as the webmaster for *The Indexer* website, [www.theindexer.org](http://www.theindexer.org)

#### Website Committee

The Website Committee met in April and October, to consider details of site content and structure, to oversee the work of the Webmaster and to look for new ways of making the site more useful to the Society and its members. Liza Furnival retired as Chair in April and, as a replacement could not be found, James Lamb took over the role.

#### Websites

##### The main SI website ([www.indexers.org.uk](http://www.indexers.org.uk))

Updates were made to the site software enabling certain pages to be updated directly by authorized Society members rather than by the webmaster, resulting in more up-to-date information and better use of webmaster time. Also, members now have individual passwords to access the members' area, improving site security and the service to members. An important part of the website is the online *Indexers Available* directory, reported below.

The site is receiving fewer visitors, but they are making more use of the site (see table below).

##### [www.indexers.org.uk](http://www.indexers.org.uk): statistics

	2006	2007	2008
Total no. of hits	231,869	1,182,674	1,538,214
Hits on pages	162,579	441,827	645,874
Total no. of visitors	4,054	7,708	5,885
Average no. of hits per visitor	57.2	153.4	261
Average no. of page hits per visitor	40	57.3	110
Average no. of visitors per day	11.1	21.1	16.1
Average no. of hits per day	635	3240	4203
Average no. of page hits per day	445	1,210	1,770

##### The *Indexer* website ([www.theindexer.org](http://www.theindexer.org))

This runs as a separate site from the main site, reflecting the publication's standing as an international journal. The online subscription renewal system developed last year

was extended to update automatically a database of subscribers, enabling automatic production of despatch lists and renewal reminders.

The full 50 years' back issues, back to issue 1 in 1958, were digitized and made available on the site. A database was created of contributor permissions, controlling which articles are available. As permissions were received, the articles from that author were made available automatically.

#### www.theindexer.org: statistics

	2006	2007	2008
Total no. of hits	123,581	266,217	297,041
Total no. of visitors	5,099	4919	3870
Average no. of hits per visitor	24.24	54.1	76.8
Average no. of visitors per day	13.97	13.5	10.6
Average no. of hits per day	338.58	729	812

The most recent years' issues have been uploaded to Ingenta (an academic publications publisher) and made available to current subscribers. A database was developed to allow members of the Canadian and Southern African societies to receive their Ingenta passwords automatically.

#### Email lists

Caroline Diepeveen was appointed to the honorary role of List Moderator for SIDeline and SI-Trainee.

#### Sideline ([list.indexers.org.uk/mailman/listinfo/sideline](http://list.indexers.org.uk/mailman/listinfo/sideline))

is the forum for discussing all indexing-related matters, including business, marketing and Society matters, as well as thorny problems of indexing itself. Discussions are wide ranging and include off-topic (OT) matters giving a degree of social contact between the geographically spread membership. The number of subscribers was 343 members. The total number of messages in the archives is now 19,501.

**SI-Announce** is used to distribute information quickly to the membership; it has 591 subscribers. **SI-Trainee** has 120 subscribers.

**Yahoo Groups** Most local and special interest groups have their own Yahoo groups for email discussions. Various of the Society committees, including the Executive Board, have their own lists, which greatly facilitates Society work between meetings.

All members are encouraged to join SIDeline and their local group's list – see the index on the SI website under 'email discussion lists'.

#### Indexers Available

The Society's professional directory, *Indexers Available*, is a vital link with publishers and editors, providing access

to around 200 qualified or experienced indexers available to take commissions. The database-driven version continues to be used, allowing members to update their own entries, as frequently as they wish, add subject headings of their own and to pay online using plastic cards. The charge for taking an entry was reduced from £40 to £20. The survey into how editors use *Indexers Available* is reported below under Marketing.

#### Occasional Publications

Stocks of Occasional Publication 2, *Indexing Legal Materials*, ran out during 2008. Rather than commission another large print run, James Lamb digitized it and uploaded it to Lulu, a print-on-demand publisher, making it available through the Society's website. This has proved successful, with the regular demand for a small number of books being met automatically and with no Office administration.

#### MARKETING

The committee met three times during the year (in February, June and October). Two long-term members – Liza Furnival and Moira Greenhalgh – retired during the year; their contributions will be greatly missed. The 'brainstorming' and wide-ranging discussions that take place during meetings are particularly valuable, but avid readers of these annual reports will have noted that some proposals take an inordinate time to come to fruition. Having ideas is one thing, but working out how to put them into practice is quite another – we are, after all, indexers, not marketing experts; and we are also constrained by having limited resources (in terms of both time and money). From time to time we ask the membership at large for input, to help us target particular types of publicity material more effectively, for example. Sadly, requests for this kind of information are largely ignored by the vast majority of the membership. Another particular frustration is that we are largely working in the dark – it is almost impossible to judge the effectiveness of most of our marketing and PR activities.

#### Advertising

Inevitably, given the high cost, we cannot even consider advertising in many publications – hence the need for other methods of raising our profile. However, we continued our programme of regular adverts, either publicizing the existence of the Society and its training course or promoting the services of professional indexers (or both). Regularly updated advertising copy appeared during the year in *The Author*, *Writers' Forum*, *CILIP Library and Information Gazette* and the *CiG Yearbook* and we also continued to use Google-Ads to encourage people to visit the SI website.

#### Bulletin and Calendar

Various news bulletins, calendar updates and press releases were sent out by email to a large number of recipients. As usual, the information included in these was reproduced as both snippets and longer items in various publications, notably the *CILIP Library and Information Gazette*, which featured the new-look *Indexer* and Barbara

Hird's Wheatley success, for example. However, by and large we have very little idea of how much impact these bulletins have

### **Booklets and leaflets**

During the year the text of the 'general' leaflet was thoroughly revised and the leaflet itself redesigned and enlivened with illustrations. This leaflet is mailed to publishers and others and displayed at conferences and exhibitions, as is the 'authors and indexes' leaflet, which also goes out to university librarians (with the aim of reaching academic researchers). Several members have also distributed these at suitable bookish venues. A new flier was also prepared for *The Indexer* (see below). There was also some discussion about producing a leaflet aimed at designers, in response to a general feeling that the usability of indexes is all too often compromised by lack of attention to design and layout. This is one of those projects that has scarcely even reached the drawing board, partly at least because we need YOUR input – send us examples of good and bad design; let us know how your brilliant index was ruined by poor design.

### **The Indexer**

Raising awareness of *The Indexer* was a key concern during 2008, with the move to quarterly issues and online access. Liqun Dai and Maureen MacGlashan worked hard at building up contacts with the overseas indexing societies and taking every opportunity to promote the journal to their members. A new flier was produced in the form of a postcard, with one side in the style (and colour) of the journal's front cover. This was mailed to university libraries and schools of librarianship and information science, displayed at exhibitions and conferences, especially ASI's annual conference, and distributed to new members of overseas indexing societies. Most notably of course, it appeared on every seat at the IgNobel Awards Road Show in London, where achievements that 'first make people laugh and then make them think' were honoured. This was a rare opportunity to demonstrate the importance of indexing and show that indexers are a more lively bunch than people might have imagined. As Maureen MacGlashan (on behalf of Australian indexer Glenda Browne) explained the problems of alphabetizing 'the', the 15 SI members seated near the front of the lecture hall leapt to their feet, holding up the letters 'INDEXERS UNITE!' (see *The Indexer*, March 2008 for more information).

### **Directories and websites**

Entries about indexing and about the Society and our various activities were updated during the year as necessary. The marketing committee also keeps a watching brief on the 'marketing' pages on the website, ensuring that these are also updated as necessary.

### **Editorial**

Articles about indexing can have so much more impact than paid adverts but this is another activity that cannot happen without input from members – we need well-written material aimed at particular audiences. This, of course is only half the battle – we also need publications

willing to publish it. We have good relations with the ISTC, and are very grateful to Bill Johncocks for his excellent series in their journal, *The Communicator*. These articles have now been posted on the SI website to give them further exposure. We must also mention the excellent pro-indexing article by our President, Professor John Sutherland, in *Guardian online*.

### **Exhibitions and conferences**

Society materials were displayed at several conferences/exhibitions, including those of the SfEP, CILIP's Cataloguing and Indexing Group, ALPSP, the ISTC, the British Association Festival of Science and the Society of Legal Scholars. In addition, Jane Read gave a talk on indexing at the ISTC conference, and Catherine Stansfield handed out leaflets at Online Information. In response to a suggestion from the Scottish Group, we proposed running a session on indexing at the Edinburgh Book Festival, but the organizers were overwhelmed with suggestions for seminars etc. and it was no surprise that indexing failed at the first hurdle. It has also been suggested that the Society run a seminar at the London Book Fair but further investigation has shown that this is quite simply beyond our means. One area the committee would like to develop further is subject-specialist conferences – this is where we would hope to find many of the researchers who are on the point of publishing their research in books that need indexes. However, once again we need advice from the membership as to which conferences to target. Again – it's over to you!

### **Merchandise**

Merchandise is produced largely to promote indexing and the Society in a light-hearted way. New supplies of T-shirts in a range of colours were on sale at the Winchester conference and we continued to sell our range of Christmas cards. Rather than produce a new printed card, this year we followed up a suggestion of making an e-card available for members to download from the website to send to clients and Joan Dearnley obliged by coming up with another of her designs (after an idea from Wendy Burrow). Many people who attended the Winchester conference are also now advertising the Society on excellent cotton bags which have a wide range of uses and can be stuffed into a handbag or briefcase to cope with unexpected purchases.

### **Surveys and research**

Following a suggestion from the Consultative Council, the marketing committee organized an online survey (using the free e-surveys website) to find out more about how indexers negotiate fees with clients. As reported in *Sidelights*, this showed considerable support for SI's recommended rates but highlighted the fact that a worryingly high proportion of respondents were experiencing problems in negotiating acceptable fees, with the result that their average hourly earnings were below the recommended minimum. There is certainly a long way to go in convincing clients that indexers are skilled professionals who should be appropriately remunerated. One effect of the survey was that a rate per thousand words was introduced.

We also organized a survey into how editors find and commission indexers (and their use of *Indexers Available*). Although this had a rather low response rate, one side-effect was that it actually helped to publicize the existence of *IA*. Given respondents' tendency to rely on their own lists of preferred indexers, this can only be a good thing. It also showed their preference for qualified indexers and for indexers with subject expertise, but confirmed the suspicion that familiarity with the broad subject areas was thought to be sufficient. And not surprisingly, more than half admitted that authors sometimes or usually indexed their own books.

It has also been suggested that research should be conducted into book-buying habits and how much sales are influenced by the presence of (good) indexes. There is no way in which we can begin to conduct this kind of research but there is the possibility of approaching universities with publishing/information science/marketing courses to suggest that these might be suitable topics for undergraduate dissertations.

### Relations with publishers and authors

The surveys mentioned above show that we have considerable work to do to raise our profile amongst publishers and emphasize the importance of them using qualified and experienced indexers rather than pushing the responsibility for the index onto the author. Advertising the directory (*Indexers Available*), our guide for editors (*Last but not Least*) and our in-house workshops, as well as distributing the 'authors' leaflet, all contribute to this. But we are also conscious of the urgent need to find a way of improving the advice on indexing that publishers are giving to authors. However, this is another of those areas where we have to tread carefully. It is also essential that members play their part. We cannot advocate the use of qualified SI members unless we can be sure that members themselves are taking responsibility for their continuing professional development and not indexing outside their areas of competence, in line with the code of professional conduct.

### MEMBERS' SERVICES

The Members' Services Directorate co-ordinates aspects of the Society's activities which relate primarily to the benefits of membership, especially publications, and the Information Exchange. Hilary Faulkner was elected Director of Members' Services at the AGM, following the resignation of Auriol Griffith-Jones.

#### **The Indexer**

*The Indexer* made the major change from twice-yearly to quarterly publication, to general applause. The truly international character of the journal was emphasized in an article by Catherine Sassen on the 'Geographical distribution of authors' in the September issue, and by others on indexing in China, Turkey, Canada, Australia and New Zealand; while the news from the 'Around the World' section, edited by Glenda Browne, accentuates the fellowship of indexers everywhere. The eclectic mix of general interest subjects ranged from consideration of

Web 2.0 and e-books to usability studies, controlled vocabularies and topic maps, and indexing of archives, with technical help on diacritics, Japanese names, biblical materials and law websites.

Christopher Phipps took over as Reviews Editor; Maureen MacGlashan attended the Annual Conference of the Turkish University and Research Librarians Association to promote indexing there, and good relations have been advanced with the China Society of Indexers.

The website ([www.theindexer.org](http://www.theindexer.org)) now has the full complement of back issues available for online access, though not every article is available as some permissions are yet to be traced.

#### **Sidelights**

The newsletter continued to provide members with essential Society news and information, reports of meetings and workshops and tips and puzzles to lighten the mix. It can also occasionally be a good forum for more serious discussion on topics such as training. Janet Reed and Jane Read encouraged members to write material for inclusion and towards the end of the year there was a noticeable increase in submissions from members.

#### **History of SI**

This is still in preparation, fitting around work and family commitments.

#### **Sales of publications, 2008 (2007 for comparison)**

Publication	Total 2008	Total 2007
OP 1: Biographies etc.	21	18
OP 2: Legal Materials	0	8
OP 3: Medical Sciences	11	5
OP 4: Newspapers etc.	9	7
OP 5: Children's Books	5	6
Booth: <i>Indexing ...</i>	11	-
Stauber: <i>Facing the text</i>	4	10
Mulvany: <i>Indexing books</i>	6	10
Browne: <i>Website indexing</i>	6	1
Wheatley – <i>How?</i>	5	7
Wheatley – <i>What?</i>	5	5
<i>Anthology</i>	0	3

#### **Information Leaflets**

It was agreed that a number of these require updating and work towards this was scheduled to start in 2009.

#### **Information Exchange**

By the beginning of the year the Society of Indexers Information Exchange (SIIE) had been up and running for nearly a year, under the excellent co-ordination of Susan Bosanko. As expected, there had been a few misapprehensions about its scope, but it has undoubtedly become a useful source of information about new clients, and advice on problems with payment and other matters.

The Information Exchange received a good number of confidential enquiries, most commonly requests for basic

information from members about clients they had not worked with before. Other exchanges included (but were not limited to) problems with delayed payments, with the outsourcing of finance departments to overseas contractors raising particular concerns. An article on the Information Exchange's first year ('My name isn't Judith...or the Information Exchange one year on') appeared in the Spring 2008 issue of *Sidelights*.

### Conferences

Organised by the Wessex Group, *The Round Table Conference* was held at the West Downs Centre, Winchester, from 11 to 13 July 2008, attracting 98 delegates plus visiting speakers and guests. It was particularly pleasing to note that the total number included 27 trainees and 24 'Yellow Spots' (first-time attendees), many of whom remarked on the friendly atmosphere and the willingness of delegates to share their knowledge and experience. The programme focused on the practical skills of indexing and matters relating to employment as a freelance indexer and included a choice of four SI workshops and a wide variety of parallel seminar sessions.

There were many memorable moments throughout the weekend, but one of the highlights was undoubtedly the Introductory Notes choir and their heartfelt rendition of 'An Indexer's Lot is not a Happy One', which ended their short recital on Friday evening. Equally memorable was the breakfast chef's re-enactment of King Alfred burning the cakes (bacon) – the resulting fire alarm provided both an early morning wake-up call and a fascinating insight into an indexer's preferred night-attire!

At the AGM, Adele Furbank was elected to the Executive Board as Conference Liaison.

## PROFESSIONAL DEVELOPMENT

### Training Course

The day-to-day operation of the training course is handled by the Course Administrator and the Course Co-ordinator, with the Training Course Committee overseeing both practical improvements in the way the course is run and ongoing developments in course materials.

The committee met once in 2008 and also held a telephone conference meeting. The winner of Betty Moys Prize for the most promising new indexer was announced at the Winchester conference (*see* Awards and Honours).

Eleven (11 in 2007) people qualified as Accredited Indexers during the year.

Online tutorials are now a successful part of the training course; ten were held during 2008, with positive feedback from the participants. The tutorials give course candidates extra practice at indexing 'real' texts, thus preparing them better for the formal tests.

Markers for the training course take part in regular moderation sessions, organized both through email format and live sessions.

New trainees continued to sign up to their dedicated email discussion group (SI-Trainee) for discussion of issues of common interest.

SI's training course has been opened up to members of indexing societies and networks which are part of the International Agreement; candidates do not need to join SI and are not awarded Accreditation, but are given a Certificate of Completion.

The CILIP Seal of Recognition was awarded to SI in recognition of its training activities. The assessment report commented positively on the number of aspects of organisation of knowledge organisation and information retrieval covered in the course and on its emphasis on the importance of considering the user's requirements.

A working party was set up to consider the future development of the training course and the potential of e-learning; it is planned that the next edition of the course will be internet-based. Revision of the course materials for a new edition is being carried out.

### Course Unit/Test Sales

Year	2008	2007	2006	2005
CD1: Unit A	88	116	143	145
CD2: Units B-D	45	56	64	57
Test A	52	61	62	62
Test B	45	43	53	48
Test C	37	34	58	39
Test D	24	25	27	24

### Trainee numbers

Year	2008	2007	2006	2005
Total Trainees *	107	102	114	104
New Trainees †	50	58	60	53

\* Trainees who applied for test papers; i.e. they are counted as one trainee whether they have applied for one or more tests during the year.

† Trainees who applied for Test A during the year.

As can be seen from the tables above, sales of units are down on previous years whilst sales of tests and indeed trainee numbers are relatively stable. This suggests that there is less speculative purchase of the course by people who do not continue with it.

### Workshops

The Workshops Committee met in May and held a telephone conference call in December. In 2008 a total of 21 workshops were advertised, ranging from introductory workshops to workshops for editors, local groups, advanced trainees and more experienced indexers. Of these, 14 ran.

For the second year running an 'Introduction to Indexing' workshop was offered on a Saturday, to attract people not able to attend a mid-week session. Although the four participants had all chosen to attend at the weekend, all could also have come to a mid-week workshop.

Ann Hudson's 'Essential or Trivial' workshop ran as a local group workshop in Milton Keynes and Hove; both had eight participants. The system of inviting local groups to host workshops continues to be successful.

There were two in-house workshops for editors in 2008. Derek Copson led a very successful in-house session for the Open University in Milton Keynes. This was for editors and authors working in the fields of maths and computers (all attendees had either an MSc or PhD in related areas). Derek recommended that a one- or two-day indexing course for OU maths and computing authors could be put forward as a follow-up; it was hoped that a suitable tutor with competence in both subjects would be identified in 2009. Ann Hudson led two 'Indexing for Editors' sessions for OUP production editors working in the areas of Law, Medicine, Higher Education, Academic and Reference. Both groups of editors were lively and interested and went away enlightened!

2008 was the second year in which four two-hour workshops were scheduled as part of the annual conference programme. Workshops were offered on cookery indexing, serials indexing, good business practice, and editing the index: all four were well-attended and the feedback was very encouraging. Bill Johncock's pre-conference workshop on embedded indexing ran successfully with eight participants and Joan Dearnley led 'Introduction to Indexing' as a pre-conference workshop with five participants.

Other events arranged by the committee included an 'Indexing for Editors' workshop led by Ann Hudson at the SfEP conference – a session which we offer every other year, and which is always well-received – and a talk by Jane Read on 'Indexing for Technical Writers' at the ISTC conference in Nottingham. This is the first event Jane has led for the Society.

The only workshops designed for qualified indexers have been those at the conference and Ann Hudson's 'Essential or Trivial'. Using conferences and local groups would seem to be the most successful way of delivering these.

### Fellowship

Two applications were received during the year, neither of which was successful. Twenty members attended the pre-Fellowship session at the conference, but no bookings were received for one-to-one pre-Fellowship tutorials.

### Professional Status

Following an exchange about qualifications on Sideline, some suggestions were put forward at the conference for a new membership structure which would recognize the value of experience. A working party was set up by the EB to develop and expand on this idea, with the aim of submitting a proposal to the membership in 2009.

### Workshops Programme January – December 2008

Date	Title	Venue	No.
26 Jan	Getting Started (advanced trainees/ newly qualified)	London	5
29 Jan	Indexing for Editors (in-house)	Open University, Milton Keynes	7+
4 Feb to 31 March	Pre-Fellowship	Online	–
7 Feb	Introduction to Indexing	London	–
11 March	Introduction to Indexing	London	8
13 March	Essential or Trivial (trainees)	Milton Keynes	8
3 April	Introduction to Indexing	Birmingham	–
7 May	Introduction to Indexing	London	–
13 May	Indexing for editors (in-house)	OUP (2 x 2.5 hour workshops)	40
11 July	Introduction to Indexing	Winchester (pre-conference.)	5
11 July	Embedded Indexing	Winchester (pre-conference)	8
12 July	Creating order out of chaos	Conference	19
12 July	Indexes from the kitchen	Conference	20
12 July	Good business practice: an introduction	Conference	20
12 July	Serial indexing: from journals to databases	Conference	17
9 Sept	Indexing for Editors	SfEP Conference Oxford	
10 Sept	Introduction to Indexing	Oxford	7
9 Oct	Introduction to Indexing	Bristol	–
11 Oct	Introduction to Indexing	London	4
15 Oct	Introduction to Indexing	Manchester	7
29 Oct	Introduction to Indexing	London	5
4 Nov (half-day)	Essential or Trivial	Hove (Sussex Group)	8
26 Nov	Introduction to Indexing	London	–



## COMMITTEE MEMBERSHIP AND RESPONSIBILITIES 2008

The Chair and Secretary are *ex officio* members of all committees. Specific responsibilities are included in parentheses.

### President

Professor John Sutherland

### Officers

Sue Lightfoot (Chair until AGM)

Ann Kingdom (Chair after AGM)

Judith Menes (Secretary)

Cate Allwood (Treasurer until AGM)

Sally Roots (Treasurer after AGM)

### Executive Board

The three officers, plus:

Jane Coulter (Consultative Council Chair until November)

Hilary Faulkner (Members Services after AGM)

Adele Furbank (Conference liaison after AGM)

Auriol Griffith-Jones (Members' Services until AGM)

Ann Kingdom (Marketing)

James Lamb (Internet)

Janet Reed (Consultative Council Chair from November)

Sally Roots (Conference liaison until AGM)

Wendy Simpson (coopted from November)

Jan Worrall (Professional Development)

Rohan Bolton (Minutes Secretary)

### Conference Committee

Sally Roots (Chair)

Moira Greenhalgh

Jane Read

Kathryn O'Donoghue

Pat Booth

### Consultative Council

Janet Reed (Chair, Nov., Vice-Chair, May)

Jane Coulter (Chair, until Nov.)

Loraine Bayley (West Anglia Group, May)

Margaret Binns (Marketing Committee)

Kerry Bowness (North East Group, Nov.)

Anne Brinton (Cornwall and Devon Group)

Jonathan Burd (Wales and Borders Group)

Drusilla Calvert (Website Committee)

Sophia Clapham (West Anglia Group, Nov.)

Hilary Faulkner (North East Group, May)

Ann Hudson (Training Course Committee/Workshops Committee)

Oula Jones (Scottish Group)

Helen Litton (Irish Group)

Ingrid Lock (Sussex Group)

Sarah Newton (Trainees' Group)

Paula Peebles (North West Group)

Judith Reading (Yorkshire Group)

John Sampson (MedicIndex group)

John Silvester (Minutes Secretary, Nov.)

Catherine Stansfield (Three Choirs Group)

Christine Shuttleworth (London Group)

Cath Topliff (Vice Chair, Nov./*Indexers Available*)

Beverley Winkler (Minutes Secretary, May)

Hazel Young (Kent Group)

### The Indexer Production Team

Maureen MacGlashan (Editor)

Susan Curran (Production Editor)

Sue Lambert (Assistant Editor)

Christine Shuttleworth ('Indexes Reviewed' Editor)

Glenda Browne ('Around the World' Editor)

Christopher Phipps (Reviews Editor)

Frances S. Lennie (North American Reviews Editor)

Noeline Bridge (Centrepieces Editor (names))

Pierke Bosschieter (Browser Bar Co-ordinator)

James Lamb (Webmaster)

Hilary Faulkner (Director of Members' Services)

Derek Copson (Advertising Sales Manager, until Feb)

Helen Bilton (Advertising Sales Manager, from Feb.)

### Indexers Available Committee

Cath Topliff (Chair)

Wendy Burrow (Administrator)

James Lamb (Internet Director)

### Marketing Committee

Ann Kingdom (Marketing Director, and Chair until AGM)

Howard Cooke (Minutes Secretary, Chair after AGM)

Helen Bilton (Advertising Sales Manager)

Margaret Binns

Wendy Burrow (Administrator)

Liquan Dai (*Indexer* marketing)

Moira Greenhalgh (conferences and exhibitions; merchandise, until AGM)

Kathryn O'Donoghue (from AGM)

Pam Scholefield (news bulletins; Minutes Secretary after AGM)

Christine Shuttleworth (rapid responses)

*Corresponding members*

Catherine Lloyd-Evans

### Society Office

Wendy Burrow (Administrator)

Paul Machen (Deputy Administrator)

### Training Course Committee

Jill Halliday (Chair)

Paul Machen (Course Administrator)

Chris Dance

Joan Dearnley (Assistant Training Co-ordinator)

Jane Horton

Ann Hudson (Training Co-ordinator)

Wendy Toole (PIA Co-ordinator)

Jan Worrall (Director for Professional Development)

### Website Committee

Liza Furnival (Chair until AGM)

James Lamb (Chair after AGM, Internet Director and website indexer)

Rohan Bolton (Minutes Secretary)

Drusilla Calvert (Czarina and Consultative Committee representative)

Hilary Faulkner (after AGM, Members' Services Director)

Auriol Griffith-Jones (until AGM, Members' Services Director)

Paul Machen (Deputy Administrator)  
Julian Menes (Webmaster and Listowner)  
Richard Northedge  
Cath Topliff (*Indexers Available* Committee Chair)  
*Corresponding members:*  
Caroline Diepeveen (SIDeline/SI-Trainee/SI-Announce  
moderator)  
Linda Sutherland (until August)

#### **Workshops Committee**

Joan Dearnley (Tutor, Committee Chair)  
Caroline Barlow (Tutor)  
Michele Clarke (Tutor)  
Ann Hudson (Tutor, Minutes Secretary)  
Sue Lightfoot (Tutor)  
Paul Machen (Workshops Administrator)  
Jan Worrall (Trainee Tutor )  
*Corresponding members:*  
Derek Copson (until AGM, Tutor)  
Jill Halliday (TCC Chair)

#### **Additional Responsibilities**

*Fellowship Board of Assessors:* the five assessors remain  
anonymous  
*Groups Co-ordinator:* Jane Coulter

*International Representative:* Jill Halliday

#### *Local and Special Interest Group Co-ordinators:*

Elizabeth Ball (Wessex)  
Sophia Clapham (West Anglia)  
Howard Cooke (London)  
Hilary Faulkner (North East)  
Liza Furnival (Medical)  
Moira Greenhalgh (Law)  
Anne Griffiths (Earth Sciences)  
Jane Horton (Three Choirs)  
Caroline Jones (Yorkshire, from September)  
Helen Litton (Ireland)  
Ingrid Lock (Sussex)  
Catherine Ness (Scotland)  
John Noble (Wales and Borders)  
Paula Peebles (North West)  
Jane Read (Yorkshire, until September)  
Hazel Young (Kent)

*Training Course markers:* the panel of ten/twelve markers  
remain anonymous

*Website Indexer:* James Lamb

*Workshops Tutors:* see Workshops Committee

The Executive Board would like to thank all those who commit time and effort to the Society. The range of activities undertaken by the Society for the benefit of its members is extensive and can only be sustained through the hard work and varied skills of all those who give their time to the committees and services listed above. Our apologies and thanks to anyone whose name may have been inadvertently omitted from this report.

*Judith Menes Honorary Secretary*

*(with thanks to Executive Board members for their help in compiling this report)*

*July 2009*

Society of Indexers  
Company limited by guarantee. Registered in England and Wales.  
Company Registration No: 6303822  
Registered address: Woodbourn Business Centre, 10 Jessell Street, SHEFFIELD S9 3HY. UK  
Tel: +44(0)114 244 9561 Fax: +44(0)114 244 9563 Email: admin@indexers.org.uk  
www.indexers.org.uk

**SOCIETY OF INDEXERS****INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 DECEMBER 2008**

<b>Income</b>	<b>£</b>	<b>2008</b> <b>£</b>	<b>£</b>	<b>2007</b> <b>£</b>
Subscriptions		51,102		54,536
Sales, The Indexer		19,129		14,527
Publications		3,338		7,020
Indexers Available		3,768		7,827
Training and courses		31,551		28,717
Workshop receipts		6,164		7,922
Conference receipts		26,253		33,482
Advertising and marketing		417		1,070
Gifts and donations		326		1,508
Sundry receipts		339		109
Committees		55		-
		<u>142,442</u>		<u>156,718</u>
<b>Other income</b>				
Deposit account interest		<u>4,128</u>		<u>3,590</u>
Total income		146,570		160,308
<b>Expenditure</b>				
The Indexer	16,221		14,293	
Other publications	7,733		8,393	
Indexers Available	216		1,599	
Training	22,925		16,821	
Workshops	7,407		5,156	
Conference costs	17,196		32,912	
Marketing and internet	6,243		10,002	
Committees	4,150		2,745	
Wheatley Medal costs	589		317	
Administration costs	9,398		10,441	
Premises costs	7,990		7,815	
Staff costs	38,619		30,387	
Sundry expenses	612		443	
Finance costs	980		1,480	
		<u>140,279</u>		<u>142,804</u>
		6,291		17,504
<b>Depreciation</b>				
Office equipment		<u>84</u>		<u>112</u>
<b>SURPLUS ON ORDINARY ACTIVITIES BEFORE TAXATION</b>		6,207		17,392
Corporation tax		857		364
<b>SURPLUS FOR THE FINANCIAL YEAR AFTER TAXATION</b>		<u>5,350</u>		<u>17,028</u>

**SOCIETY OF INDEXERS**

**BALANCE SHEET AS AT 31 DECEMBER 2008**


	£	2008 £	£	2007 £
<b>Fixed assets</b>				
Tangible assets		252		336
<b>Current assets</b>				
Stocks of books and publications	10,121		10,005	
Debtors and prepayments	8,402		3,861	
Cash in bank and at hand	95,717		83,576	
		<u>114,240</u>		<u>97,442</u>
<b>Creditors</b>				
Amounts falling due within one year	23,943		12,579	
<b>Net current assets</b>		<u>90,297</u>		<u>84,863</u>
<b>Total assets less current liabilities</b>		<u>90,549</u>		<u>85,199</u>


**Represented by:**

**Reserves**

Betty Moys Bequest	1,990	2,490
Income and Expenditure account	88,559	82,709
	<u>90,549</u>	<u>85,199</u>

**Approved by the Executive Board on 5 June 2009 and signed on its behalf**

Signed .....  S. ROOTS .....

Signed .....  J. MENES .....

**Accountants' Report to the Members on the unaudited combined accounts of the Society of Indexers.**

We have examined the records of the Society of Indexers for the following periods:

- a. 1 January 2008 to 31 December 2008
- b. 1 January 2007 to 4 July 2007 (pre-incorporation)
- c. 5 July 2007 to 31 December 2007 (post-incorporation)

and confirm that the above Balance Sheet and attached combined Income and Expenditure Account are in accordance therewith.

  
**Westons**  
**Chartered Accountants**