Productivity: The Pros Speak Out

PNW/ASI Chapter Meeting
Richland, Washington April 2007

by Joyce Helena Brusin

Pacific Northwest Chapter president, Colleen Dunham, joined longtime members and indexers, Carolyn Weaver and Scott Smiley, for a lively and much appreciated afternoon discussion on productivity. Indexer Cynthia Landeen missed taking part in the panel, but earlier sent in her responses to the numerous interesting questions posed by moderator Cheryl Landes. Panel members each offered their perspectives on how individual work styles, deadlines, marketing demands, distractions, sleep, and exercise work together to create a productive indexer.

Colleen Dunham defined productivity as different from efficiency or speed of production. The feeling she associates with productivity is that of “flow” or of being “in the zone.” Some of us might recognize it as being entirely absorbed by the work of looking at content and creating entries. “It’s when you know you’re doing your best work,” said Colleen.

Scott Smiley checks up on his overall productivity by regularly examining income goals and the quantity of work underway. Is he doing as much work as he wants or needs to do? When indexing on a particularly tight schedule, Scott sets mini-deadlines for himself throughout the day.

Some indexers, like Carolyn Weaver, are motivated by a change in scene, and enjoy working outdoors or in new locales. At home, music helps many of us focus better, as does a comfortable office setting with adequate light, supportive software, and ergonomically correct furnishings. Carolyn also suggested investing in “business quality” printers, shredders, etc. that hold up better to the work demand placed on them by a busy indexing business.

Panelists agreed that a busy indexing schedule also necessitates a support system of proper diet, rest, and exercise that can be as important as self-discipline in meeting deadlines and performing quality work.

Enthusiastic audience participation at the end of the panel discussion brought home the enormous interest we all have in the notion of productivity. How refreshing that in a profession that requires long hours of solitary work, we find we are not alone in learning to be our own boss, examining our work habits, or dealing with our clients’ time constraints.
PNW/ASI Chapter Business Meeting and Chapter Reports

April 21, 2007

Besides mentioning committee reports (see below) and chapter priorities (see page 6), Sherry Smith added information about volunteer opportunities and Cheryl Landes talked about a usability project.

Sherry talked about the Volunteer opportunities:

1. Thank you notes (writing and sending to speakers and guests)
2. Pro Bono project of indexing 30 years of the West Plains Gazette, Missouri, from Jane Henderson’s home town. It’s a good project for a beginner indexer as Jane has created a style guide and provides vocabulary control. Any indexing software can be used and it takes about 5 hours per issue
3. Pro Bono project for experienced indexers to perform quality reviews

Sherry thanked Cynthia Landeen for producing the complimentary bookmarks and handed them out to recent volunteers as a thank you gift from the Chapter.

Cheryl is conducting index usability tests at Portland State University with the index for a book of essays. She is also talking with the University of Washington and University of Oregon about possible coordination of similar testing. She plans to present the results at the 2008 National Conference in Denver next year.

Volunteer Recognition Committee
Coordinator: Sherry Smith, indexer@sherrysmithindexing.com
Volunteers: Gayle Davies, Cynthia Landeen, J. D. O’Conor, Kathy Anderson

The committee continues to keep track of all volunteer efforts so that all members are recognized and thanked for their efforts. Special bookmarks, prepared by Cynthia Landeen, are given to all members who help with the program planning and logistics for each chapter meeting. At the October meeting, all volunteers who have given time and energy are given certificates of recognition for their efforts. Committee members also write thank you notes to all presenters.

What else is needed? Another volunteer or two to write the thank you notes and another volunteer to brainstorm special recognition options for the October meeting.

Pro Bono Committee
Coordinator: Sherry Smith, indexer@sherrysmithindexing.com
Volunteer reviewers/mentors: Jane Henderson, Cher Paul, Debra Spidal, Carolyn Weaver, Breffni Whelan, Colleen Dunham,
Volunteer indexers: Tami Robinson, Gayle Davies, Kathy Anderson, Lee Lawton, Maria Sosnowski, Margy Olmstead, Sabina Rascol, Renee Remlinger

The purpose of a pro bono project is to match qualified beginning indexers with non-profit organizations that need indexes for their publications.

Current projects include 30 years of the West Plains Gazette, four years of PNW newsletter, and 25 years of the journal for the Washington Library Association.

Jane Henderson is coordinating the Gazette project which is a history magazine. She would like to have more volunteers. Since Jane is not here today, please see me if you would like to help.

The PNW newsletter issues can be done by one person or shared by several people. See Sherry about this project.

Tami Robinson will be indexing the library journal and Colleen Dunham will be reviewing the work.

The committee is also discussing a partnership with the Rocky Mountain Chapter in an effort to expand the indexer and project pool.

The committee is currently discussing the feasibility of having indexers recruit their own pro bono projects.

What else is needed? One or two more people who are willing to review indexer applications; ideas for indexing projects and the willingness to contact organizations about the Pro Bono Program.

Community Relations/Marketing Committee

What do we do? Activities designed to:
• encourage participation in PNW ASI by members and potential members
• educate publishing professionals about the characteristics of good indexes and help them locate good indexers
• promote the value of professionally prepared indexes among publishing professionals
• provide information to the lay public about the profession of indexing

Current committee members: Sandy Farrell, Judi Gibbs, Mary Harper, Annanaomi Sams, Jane Henderson (Coordinator)

What have we done lately? Since our last chapter meeting, we have:
• completed an online survey to identify qualified nominees for our honor roll of publishers
• received the draft logo from the logo committee and are preparing to proceed with development of a new chapter brochure

What kind of help do we need? We need people to help in the process of evaluating publishers for the honor roll. Specific tasks include:
• develop guidelines for evaluation of published indexes
• obtain permission from honor roll finalists to duplicate and disseminate published indexes for review
• collect published indexes by honor roll finalists
What’s this process we call index editing?

*PNW/ASI Spring Meeting 2007*

*Session report by Debra F. Spidal*

Cheryl Landes of Tabby Cat Communications and Sherry Smith of Sherry Smith Indexing led a discussion of what we, as indexers, consider the index editing process. It should come as no surprise that the responses were as varied as the number of attendees at this session.

The session was divided into two parts. The first part was a philosophical discussion about the editing process. The second part focused on techniques and strategies people use to address specific problems in the editing process. To open the discussion, Sherry shared ten productivity rules as follows:

**Productivity Rules**

1. Begin your indexing career with 10 years experience.
2. Have a photographic memory.
3. Accept only projects that have been written by authors who created delightfully well-organized documents.
4. Accept only projects that have been copyedited by perfect people who had unlimited quantities of time.
5. Always index the same topic and the same type of document.
7. Make all structure decisions before you begin reading.
8. Never have doubts about any decision that you make.
9. At first glance, understand the text and all of its conceptual relationships.
10. Own a compliant computer.

They led off by making the point that most editing workshops are based on two premises: that editing is a discrete step that occurs at the end of the indexing process and that editing takes place after structural decisions have been made. Both Sherry and Cheryl disagree; they believe that the editing process occurs continuously throughout indexing. This idea was explored through a guided discussion.

The first question posed was, “Why edit?” Why do you bother to edit the index? What happens in the index if you don’t?

1. it’s a mess
2. don’t want to look stupid in public
3. space considerations
4. start sloppy and clean up
5. uncover mistakes
6. clarify/build structure of index
7. it’s like moving into a house (sorting boxes and getting settled in)

The second question was, “What do you do when you edit and why?”

1. scan for errors both obvious and not obvious
2. correct spelling inconsistencies, locators
3. scan on screen, delete single subs, split long strings, inversions
4. process notes made during indexing
5. seeing house as whole instead of pieces
6. look for connections missed on the first pass
7. search and group
8. don’t delete orphans until done (mark and review later)
The third set of questions was, “Why do you work that way?”
1. daunted by the length of the list
2. faster than making a list
3. learn as they go and fix structure as they realize it
4. question whether entries reflect what the book is about and look for holes too
5. edit after each chapter while it is fresher and it goes more quickly
6. edit as they go, catch synonyms but true edit at edit stage, a distinction was made between the gross edit for spelling, typos, blind x-ref (all the easy stuff) and the fine edit for structure, locators matching between terms (now it is an index)
7. another person shared that they saw it as a four step process: 1. collect terms, 2. compile terms into structure, 3. edit for readability, to normalize prepositions, check specifications, and 4. quality control (gross edit).

The fourth question was, “Why do we distinguish editing from indexing?” The discussion that followed seemed to agree that whether editing was done in conjunction with indexing or as separate step, most still see them as two processes. A comparison with writing and editing was made again. One can edit while they write or after they finish but the processes are distinct.

Cheryl and Sherry then showed us several examples for further discussion about the editing process.

The first set of examples was how we deal with sub-entries.
1. some indexers begin creating sub-entries immediately
2. others wait until they see a pattern emerging, then go back and collect terms
3. editing consisted of pulling entries into categories or collapsing into groups
4. some indexers wait until the end, some create subs as they work

The next example was phrasing changes, to pull entries together. What processes have taken place?
1. disagreement on whether this is indexing or editing
2. building the index is a continuous/evolving process
3. phrasing changes occur at both stages
4. fine edit is polishing stage
5. entering is mindless, editing is thoughtful
6. dump it all in and then organize it
7. different indexes are different; sometimes structure comes sooner, others it isn’t until editing that it comes together
8. sloppy indexer; gross edit, fine edit reduces length by 25%
9. some require little editing at the end because they did it as they went along

The purpose of this part of the session was to help us think about our processes and how we might improve our productivity by recognizing when and how we edit. Working against our own nature is probably not productive. The goal is to improve efficiency by understanding how we each, as individuals, work.

The conversation now moved from the philosophical to specific techniques indexers use when editing, indexing problems, and the tactics we use to solve them.

We began with an example of overlapping terminology:
1. flag entries for review later
2. add bad see ref as a flag
3. multiple synonyms; index under original term and add see refs then decide later
4. most people have some kind of system to track and make decisions later
5. some make decisions as they go

The question was raised on when we create subheadings, as you go or wait until you have a certain number of locators and go back? The consensus seemed to be it depends on the material; technical create subs immediately, children’s wait.

How do we approach material? This seems to depend on what we have available.
1. skim for content or jump in
2. tables of contents are rare
3. front matter rare (ask for manuscript)
4. read introductions and conclusions

Many indexers use their indexing software to enter notes or searchable character strings to go back and deal with difficult items later. We then shared different flagging techniques we use when indexing. While talking about terminology in multi-author books, the question was raised whether it is myth or truth that the index must reflect the text. Since the reader hasn’t read the text, how do you know what they will expect in the text? As usual, different indexers handle this differently.

How do we deal with terminology changes in multi-author books? How do you handle different terminology?
1. use author’s terms and cross-reference ; political advantage to doing this instead of collapsing
2. argument against scattering information, go with the majority usage
3. go with terms in editor’s introduction and conclusion
4. do we really know the terms are synonyms?
5. are the subheadings the same under each term? If not, do not merge.
6. some terms are used interchangeably in one chapter and distinguished in another chapter

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Index Editing continued

It was generally acknowledged that there was no simple answer to this dilemma.

When you don’t understand the text, what strategies do you use to unstick yourself? How to handle obtuse text.

1. Wikipedia
2. find an expert
3. ask editor for support
4. approximate or ignore
5. look for noun or noun phrase to get it in the index and go back if necessary

At this point, a quick poll was taken to see what indexing software the group primarily used. Cindex predominated on this day. A brief discussion followed about choosing software and choosing wisely because switching later is difficult and costly.

The final question was what specific flagging techniques we use?

1. Sky: notes in all caps is a reminder to self to look at, process to remove flag is scan of print
2. Cindex: XXX or other unique character string to group on, CAPS so it stands out, search on these as part of edit checklist
3. float or sink (hidden text that cause entries to float or sink in the index)
4. global notes to apply to all indexes
5. { } to hide notes
6. work in format vs. draft

Sherry and Cheryl concluded the session with the following thoughts:

1. Writing an index involves two major processes: creation and verification. In the first, we are making many decisions about how to structure the index for easy navigation and information retrieval. We decide upon gathering points, entry phrasing, and access routes. Editing tasks can and will occur throughout this process, even when we haven’t completed the book. In the second process, we are verifying and proofing our decisions.

Czarina Takeover

Following Sue Dryer’s presentation at the Spring 2007 meeting, Colleen Dunham proclaimed herself PNW-ASI Ergonomics Czarina.

Sue told about her own on-the-job injuries. She explained how being ergonomically smart prevents them. Being ergonomically smart means being aware of our workplaces and how we use the equipment in them. It means paying close attention to our physical selves. It means selecting equipment and tools that fit with our bodies for comfort, efficiency, safety, and productivity.

As Czarina, Colleen intends to make ergonomics a subject at every PNW-ASI meeting. “Most of us are our own small businesses, Colleen explained. We don’t enjoy the luxuries of larger organizations where worker safety is monitored and office equipment is supplied,” she stated. “I propose that being ergonomically smart also means running our meetings better.” The Czarina intends to make that happen.

PNW Logo Update

At the Fall PNW meeting, after extensive efforts by the logo committee (Colleen Dunham, Jane Henderson, Stephen Hopkins, Martha Osgood, Cher Paul), members were given several choices. According to Stephen Hopkins, “The winning design theme was the coastal sunset. It bears repeating that a design THEME was voted on, not a final design. This was necessary both to guide the efforts of the artist(s) and to give us the flexibility to adjust image placement, text, font, scale, etc.” Jane Henderson is currently working with a graphic artist on the final design.
Technology Corner
by Ed Rush

Talking to your computer doesn’t necessarily mean that you’re going nuts. It also doesn’t have to mean that you have invested serious dollars in voice-recognition software. With your basic Mac OS 10.4, you can set up your Mac to respond to some voice commands.

Go to System Preferences and select the Speech panel. Ensure that the Speech Recognition pane is selected. In it, click the “On” button by “Speakable Items.” “Microphone” should be set to “Internal microphone” unless you have an external mike to use (for Skype, maybe).

Now you can choose how to tell the Mac to listen up: either with a key or with a keyword. The latter is like in Star Trek, where crewmen were always saying “Computer, display scanner results.” The computer ignores other conversation until it hears the keyword (“computer” in this case, but you could set it to “Yo, Mac!” or whatever you like), then listens for a command. I have mine set to listen when I press the Esc key. There’s a little more on the Speech panel, but you can figure it out easily enough.

Now set specific commands to be recognized. There’s a small, round window that appears in the upper-right corner of the screen. Its top part shows a gray microphone, the middle shows the enabling key (Esc for me), and the lower part looks like an old console radio’s speaker grille.

At the very bottom of it is a little triangle; click it to get a choice of opening the Speech Preferences window or the Speech Commands. There are an amazing lot of preprogrammed commands that you might find useful, including “Tell me a joke.” Really! And “What time is it?” can be useful. If you need “What day is it?” you might want to get some rest.

PNW-ASI 2007 PRIORITIES

1. Recruit good people to become involved in chapter leadership.
2. Acknowledge that the gung-ho energy and curiosity of beginner indexers is critical to the health of PNW. Create a system for pairing up beginners with senior indexers so that beginners can get good information and advice and can comfortably find a role within the chapter.
3. Agree that no member or potential member should ever be precluded from attending a chapter event because of money. Create a mechanism for funding those members.
4. Collect and make available a complete record of PNW board meeting minutes, conference announcements, and newsletters.
5. Establish a PNW reward for excellence in indexing (a mini Wilson award).
6. Establish a PNW reward to honor members who have provided distinguished chapter service (a mini Hines award).
7. Get the word out that “There is such a thing as A Professional Indexer”.
8. Reward good publishers.
9. PNW web site: redesign the site with more pizzazz, especially now that we have a logo.
10. PNW web site: update the directory.
11. PNW web site: update the lists of publishers.
12. Prepare scripts, such as, what to say when calling to get on an organization’s speaker’s list.
13. Find out if childcare is something we should offer at chapter events.

You can also set up your own. Select an icon and say “Make this speakable,” and then you can just speak the icon’s name and it will open. I have several AppleScripts set up that way, so I have but to hold down the Esc key and say “Show daily news” and it runs the script named ”Show daily news.”

This built-in voice recognition is pretty good, but sometimes you have to repeat the command. If there is background noise, that especially tends to confuse it.
Wilson Award Winner

This year the Wilson Award was presented to one of our very own members, Do Mi Stauber. “The ASI/H.W. Wilson Company Indexing Award was established in 1978 to honor excellence in indexing of an English language monograph or other non-serial work published in the United States during the previous calendar year. Its purpose is two-fold: for indexers, to provide and publicize models of excellence in indexing; for publishers, to encourage greater recognition of the importance of quality in book indexing” (ASI website).

Stephen Hopkins wrote to Do Mi to ask her how she was notified of her Wilson Award. Here is her response:

The Wilson winner is notified by telephone at the end of the judging by the committee chair. (I was chair the year Laura Gottlieb won, and I got to call her at midnight just as she returned from the theater. It’s the best part of the chair’s job!)

I was at a Macrex workshop in San Francisco. Kay Banning was the committee chair and everyone knew that was why she wasn’t at our workshop, as she usually is. She called Gale’s cell phone, asked for me, and told me to go out of the room and not tell anyone—big secret!! I almost had to go tell the hotel receptionist, I was bursting so much! But when I walked back in the room everyone applauded—they had figured it out just because Gale said “Hi Kay” when she answered. Then they were all sworn to secrecy, but it sure was nice to have some colleagues to celebrate with right away! I’m glad you all know now!!

I can’t tell you how thrilled I am!!!!

Wilson Award Speech
by Do Mi Stauber
May 25, 2006

I can’t tell you how thrilled I am to be given this award! Even with years of indexing experience, and even with acclaim for teaching and writing about it, indexing remains an intimate and lonely task. In a real way, we start again with each book. To have my work commended by colleagues whom I respect so deeply is a validation that I will carry with me in each moment as I face my texts. Thank you so very much.

To create an excellent index, you must start with an excellent book. The Self Possessed by Frederick Smith is a tour de force, the result of fifteen years of work. In it, the author assembles and analyzes the topic of spirit possession in all of the cultures, all of the languages, all of the religions, and most of the ancient texts of the entire South Asia region (with New Age trance channeling thrown in for good measure). Previous books on the topic have been limited to “compartmentalized ethnographies”; this is the first one to attempt a syncretic study and to challenge some of the orthodoxies that have informed the subject. This important work was
well worth the energy it took to index it.

I have discussed my indexing in such detail in my book, Facing the Text, that I won’t spend much time on it here. You all know my methods, Watson—and if you don’t, I have copies of the book available here at the conference! But I will mention some special challenges in this book.

Because of the vast range of cultures and literatures covered, the text is full of complex, nuanced concepts. The author describes starting the project as a modest article, but then “[discovering] the vast ethnographic literature of possession in India and [becoming] almost hopelessly entangled—and gridlocked—in the theoretical issues surround it” (p.xiv). This describes the indexing process very nicely! I was grateful that Smith did a brilliant job of exploring these dimensions in depth while maintaining logical organization and creating clear definitions of, and connections between, concepts. That is why I was able to track the thread of a nuanced concept like social control and the resistance to that control throughout the book, relating it to colonialism, oracular possession, the body, the fluid and multiple self...

This complexity had implications for my wording choices. My understanding of these multidimensional concepts did not come in a sudden crystallization, but built in a gradual gathering of evidence from the text. For instance, the author discussed the South Asian concept of self in many nuanced ways: as “constitutive of an intimate interplay between human, divine, and sacrificial bodies” (p. 9), as “power sharing across apparent individual boundaries” (p. 10), as a “multiple and polyvalent self” that cannot be expressed except through its multiformity (p. 203). Gradually absorbing these meanings, I made, at various times, headings for “composite self,” “fluid self,” “permeable embodiment,” and “decentered self.” Eventually I realized that all of these discussions are pointing to the same cluster of meanings. They needed to be gathered in the index, and so I needed a noun phrase. But it had to include a sense of the concept’s varied nuances, and that is where I found the slash to be very useful. It enabled me to include two representative words: fluid and multiple, so that my entry became “fluid/multiple self.” It’s ironic that I’m using this solid fist to represent this particular concept, when the self in South Asian cultures is...fluid and multiple!

A good index doesn’t spring full-fledged from the first reading. My process always includes lots of questioning, mind-changing, and less-than-felicitous choices, and this index was no exception. In an interim copy of the index file, I found notes reminding myself to separate two related terms that I had mistakenly conflated, to look for more authenticity in the locators for the shape-shifting entry, to decide how to reword “belief vs. practice” (it became “discourse vs. practice”), to do something about the out-of-control subheading for in bhutavidya in Ayurvedic texts, to make sure that the pages for “body as inert” also appeared under “dualism/nondualism,” and figure out whether all the demonology should go with the medical literature.

I checked some of my wording and structural choices with the author, who was extremely helpful and basically validated my decisions. As I moved through the text, adding entries and understandings, and changing my mind, my final index structure and wordings started to coalesce, to be clear, to form a unified and graceful whole.

It’s important to know that I’m able to handle such complex indexing jobs partly because of my indexing software, Macrex. It enables me to live in the index as I work, its shortcuts keeping up with my thinking and its flexible techniques following instead of hindering me. When I made an entry I immediately see its context in the index. I move in and out of group mode continuously, gathering on the screen all of the entries containing the phrase I’m thinking about. Keywords (or abbreviations) let me type each complicated word or phrase only once, and macros allow me to do the same operation over and over with one keystroke. Macrex’s ability to store and automate the publisher’s formatting preferences enables me to concentrate on conceptual thinking—which, in this book, was quite enough to occupy my mind!

Macrex also made it possible for me to deal with a huge technical challenge in this index. Because this book deals extensively with South Asian texts, such as the Vedas, the Upanishads, he Ayurvedic and Buddhist literature, it is chock full of Sanskrit (not to mention Tamil, Bengali, and Urdu) words, each one containing at least two, and often four or more, diacritics not available in the regular character set. I was given this job because I was able to assure the publisher that I could handle the diacritics. I did this by using a substitution table. I entered a simple and unique code for each diacritic, using a macro to avoid typing the actual codes. Macrex then translated these codes into the correct characters in the publisher’s chosen font. This meant that I delivered the index with a large part of the typesetter’s job already done (and earned the publisher’s eternal gratitude). Gale Rhoades of the Macrex support office worked closely with me, the author, and the publisher to make sure this process went smoothly, and I’m so grateful for her help!

This prize is also for the publisher, and there are good reasons for that. My long-time client Columbia University Press values good indexers. They pay a decent rate, and their editors are knowledgeable and supportive. They allow space for the detailed indexes that most scholarly books demand.
They supply PDF files that give the indexer flexible access to the text. On this book, my editor, Leslie Kriesel, was dedicated to getting the diacritics right, and participated whole-heartedly in that complicated process.

And when pages reflowed after the index was finished, Columbia took the extra time and paid me $1100 to adjust the index so that the locators were accurate.

A bit of statistical information that people might find interesting: This index took me about 50 hours to complete, of which ten were spent on editing the index. This is on the lower end of my usual range of speed (no surprise). I had about six weeks to produce the original index, which I finished in a rush just before my vacation. Page reflow (which was supposed to be minor, but turned out to include large chunks of text moving around and every one of the 78 substantive endnotes changing numbers) took an additional 15 hours after my return. I was actually grateful for the second chance this gave me to revisit and fine-tune the index.

Well, I’m proud of myself. And I’m grateful for the support this indexing community has offered me over the years. The colleagues way back at Twin Oaks who first empowered me to negotiate with clients and tackle complex jobs. The ASI members who gave me advice as I left the Twin Oaks collective and started my own business. Gale Rhoades, who taught me (and continues teaching me) to use me indispensable software and provides such wonderful technical support—Gale, you are my rock. And the students who helped me to learn by welcoming me as I shared my experiences and ideas. For twenty-one years I have lived and worked in a generous and open professional community, and if I have achieved anything, it’s because of you. Thank you again so very much!

Annual Chapter Indexing Awards

By Colleen Dunham

WHAT IF there was a way to showcase PNW-ASI’s finest work?

AND WHAT IF that fine work was recognized, rewarded, and made available to PNW indexers to refer to as ideal indexes?

WOULDN’T IT BE COOL if a competition of PNW-ASI’s excellent indexes helped solidify our professional standards, provided visibility for our profession, and became a lively forum for sharing ideas?

AND MAYBE EVEN offered constructive and specific feedback to indexers submitting their work?

If these thoughts enthuse you, stay tuned to developments as the PNW-ASI leadership pursues a plan for annual chapter indexing awards. BETTER YET, contact Colleen Dunham (colleendunham1819@hotmail.com) to help make it happen.

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