

PNW-ASI NEWS

Pacific Northwest Chapter | American Society for Indexing | www.pnwasi.org

Newsletter News

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The PNW newsletter, a bi-annual publication, is co-edited by Sam Arnold-Boyd and Judy Staigmillier.

Contact us at

judyannst@gmail.com and
cascadeindexing@gmail.com.

PNW's Website: Information and Officers

The PNW-ASI's website, www.pnwasi.org has registration information for the September 14 meeting (under [Next Chapter Meeting](#)) and details about the [Sherry Smith Award for New Indexers](#). The website also features the [2019 PNW officers](#).

Members of the board are:
Judy Staigmillier (chair), Angela Howard (treasurer), & Sam Arnold-Boyd (program chair). Maria Sosnowski handles membership.

Thank you to Carolyn Weaver for maintaining this website, and to Carolyn Weaver and Wanda Meck for managing the PNW [listserv](#).

Basics and Beyond: September 14 in Vancouver with Q&A for beginners on the 13th

The 14th at a glance:

- 9:00-10:45 Technical Indexes with a Structured Approach with Angela Howard
- 11:00-12:00 Client Relationships (Panel Discussion)
- 1:30-2:00 Meeting and Volunteer Recognition
- 2:00-3:15 Indexing Comparison activity
- 3:30-4:15 Embedding Index Tags in XML Files with Angela Howard
- 4:15-5:15 Bidding and Rates (Panel Discussion)

Great beginnings on the 13th:

Q&A time for "newish" indexers with Scott Smiley
3:30-5:30, Friday, September 13, at Scott's house,
a short drive from the SpringHill Marriott.
Carpooling will be available, leaving from the Marriott at 3:15.

If you are a "newish" indexer or wondering if indexing is for you, here's your opportunity to get your questions answered and meet others who are launching their businesses.



Scott Smiley will host this gathering. Scott has been a member of ASI since 2002 and has served PNW in many capacities over the years. He was an instructor for the Graduate School (USDA) indexing course from 2009 until 2015 (when it closed.) His teaching experience and his years of running a

successful, full-time indexing business make Scott an excellent resource!

Details about signing up for this session are in the **Registration Packet**, available at http://pnwasi.org/wp/?page_id=106
Sign up and start compiling your questions!

Basics and Beyond: September 14 in Vancouver *(continued)*

- **Technical Indexes with a Structured Approach and Embedding Index Tags in XML Files, both with Angela Howard**

Angela Howard will share her expertise with technical fields in two presentations. In her first one, she will explain the unique characteristics of technical books and then describe how she applies Fred Leise's structural indexing techniques to these books, including the metatopic, pan-granularity, and top-down and bottom-up indexing processes. Technical books include not only computer software and programming, science, engineering, and medical books; but also instructional books in any field. In her second presentation, she will demonstrate how to manually embed XML index tags in XML files, explaining how it is less difficult than you might think. The Winter 2019 issue of this newsletter includes an interview with Angela which you can access on the PNW website at http://pnwasi.org/wp/?page_id=39. She began indexing in 1999 after working as a technical writer for 12 years.

- **Client Relationships**

Scott Smiley, Madge Walls, and Carolyn Weaver bring a breadth and depth of experience to this panel discussion on client relationships. Audience participation is encouraged as they present a variety of strategies for establishing good client relationships with the bidding process, determining style specifications, and using contracts. They will also discuss how to handle complaints and disengage from difficult clients.

- **Bidding and Rates**

Scott Smiley, Maria Sosnowski, and Madge Walls will "drill down" from the Client Relationships discussion to focus on bidding and rates. They will give guidance in principles of setting rates, discussing expected rates for different types of books and strategies for successfully raising rates. The interactive format will include an opportunity to do a sample bid.

- **Index Comparison**

This small and large group activity involves one book, two indexes for the book (completed by two highly experienced indexers), and activities that lead participants in a comparison and contrast of the two indexes. We'll focus on audience, usability, and access, as well as how the indexes handle subheadings, the metatopic, and gathering scattered topics. The book, *Bringing Art to Life*, will be available for download before the meeting, giving registrants the opportunity to complete an index for the book on their own and then compare it to the indexes of two highly expert indexers. Though this latter individual comparison is not part of the session's discussion, it is a very valuable extension activity, especially for newer indexers.

DETAILS & REGISTRATION for the September 14 meeting

The location is the **Marriott SpringHill Suites**, 1421 SE Tech Center Drive, Vancouver, WA.

Follow this link to the **REGISTRATION PACKET**, where you will find complete information about **Friday's Q & A time** and dinner, Saturday lunch and dinner, and lodging at the SpringHill Marriott. To get the *Early Bird discount* (\$80 for ASI or affiliated society members and \$100 for non-members), register by August 31. To get the special rate at the Springhill Marriott, reserve your room by August 14.

Questions??? If you have any questions, contact Sam Arnold-Boyd at cascadeindexing@gmail.com

New indexers, apply for the **Sherry Smith Award** for a chance to get \$100 toward conference expenses. See the next page for more information about this award.

The Sherry Smith Award for New Indexers

The Sherry Smith Award will grant \$100 to help one new indexer per year attend a PNW fall conference. Applicants must:

1. Be currently enrolled in an indexing course for initial training in indexing. (ASI Training in Indexing course, the UC Berkeley Extension Indexing: Theory and Application course, or individual instruction from an established professional indexer)

OR

2. Be in your first year after completion of one of the courses above, as of the date of the fall conference.

Apply no later than one month before the fall conference (August 14). Application is by email to Maria Sosnowski. Indicate your name, location, course/teacher, completion date if applicable, and contact information so that we can verify accuracy. Winner must be willing to volunteer for the Program Team for a one year period after selection to help plan the fall conference. The purpose of the award is to help emerging indexers experience the benefits of networking with other indexers while we harness your ideas and energy to invigorate future conferences.

The winner will be selected by random drawing from the pool of applicants who meet the criteria. The winner will be awarded \$100, going first towards the conference fee, and then to defray other conference-related travel costs. Conference attendance is required. Applications must be received by August 14.

Apply to Maria Sosnowski at maria@index-plus.com

From the Chair: Judy Staigmiller



As I look forward to PNW's fall conference in Vancouver, Washington, I find myself reflecting a bit on ASI's national conference in Scottsdale, Arizona. One fond memory is that it was a few days of warmth that served as an escape from the land of never-ending winter, and the timing was just right because Arizona's nights were still cool. I also had the opportunity to visit a few museums and the Desert Botanical Garden as well as observe the fascinating rock formations and plant

life of the area.

I have good memories of what went on inside too. As I soaked up valuable general information, I reconsidered marking up, learned more about indexing art books, was reminded not to email editors outside of business hours, and picked up some useful tips for pay negotiation.

And this musical dunce found herself wide-awake and fascinated during the keynote speaker's address. Having had piano lessons crammed down my throat at a very young age, I have not been successful at playing anything except turntables, CD players and Pandora. When Colin Pearson pointed out that the traditional ways of classifying musical instruments have inconsistencies, it seemed so obvious to me all of a sudden. And his talk caused me to think of how many things can be organized in more than one way in many different contexts. Imagine the possibilities!

This brings me back to the September 2019 conference in Vancouver where we will consider how one document can be successfully indexed in more than one way. We will have a hands-on experience using and evaluating two indexes by two of our very successful colleagues for the same book. This is in addition to learning about technical indexes (which is a broader field than I realized) and XML file index tags. The remaining topics are client relationships and bidding and rates. There is a lot to learn from our own local group!

I've often thought about how I chatted as easily with ASI's outgoing president in Scottsdale as I do with my next-door neighbors. On the local level, I consider my fellow Pacific Northwest area indexers to be friends and mentors. Each year I am happy to see familiar faces and look forward to meeting newcomers, either to this area, or to the world of indexing. Whether you have been around for years, are a newcomer, or are somewhat in-between as I am, I hope you will join us in Vancouver.

In between then and now, when I have a few minutes, I might ponder my collection of covered ceramic cups. Do I arrange them by color or by style? What about the ones with more than one color? Is this one more pink or more green? ...



Congratulations, Sheila Ryan:

Winner of the ASI 2019

Excellence in Indexing Award

The PNW chapter is very proud of longtime member Sheila Ryan, the 2019 recipient of the ASI Excellence in Indexing Award. Sheila won with her index to *Churchill Documents*, Vol. 21 by Martin Gilbert and Larry P. Arnn, published by the Churchill Project of Hillsdale College. This volume, with over 2,000 pages, covers the period of January through July, 1945 in Winston Churchill's life. Sheila has also indexed volumes 18, 19, and 20, and is continuing with volume 22 and 23.

Read more about her process for creating this index and about the Churchill Project in the interview that follows and on the ASI Excellence in Indexing Award webpage at <https://www.asindexing.org/news/2019-excellence-in-indexing/>.



Sheila with Soren Geiger, Research Assistant to the President at Hillsdale College, at the ASI Awards Reception on April 26 at the Scottsdale conference.

PNW/ASI Spotlight: An interview with Sheila Ryan

by Judy Staigmiller

How and when did you learn about indexing? Did you have previous work experience that led to this?

I was living in San Francisco and was looking into various freelance work opportunities. It was convenient to attend UC Berkeley Extension classes (which were all still in-person at the time) while I was working, and I thought proofreading or copyediting might be interesting freelance jobs. I decided that Berkeley's Professional Editing Sequence would look good on my resume. While I was taking the Editing classes, one of the instructors was describing the book production process and mentioned indexing as one part of that process. I was curious to learn more and eventually signed up for the Extension class in indexing (it had recently changed from an in-person to an online class).

Before starting my indexing business, I worked in jobs that all required good writing and editing skills. As an environmental consultant, I prepared environmental impact reports. At the California Coastal Commission, I wrote regulatory documents that went through stringent internal review and editing processes.

If someone had told you in your youth that you would be indexing, what would you have thought?

Books have always been an extremely important part of my life. In elementary school I remember a series of spelling workbooks that included the etymology of vocabulary words, and I have always been very interested in that field. I was always reading, so even though I never really thought about indexing as a career, I don't think I would have been surprised to hear that I would end up as an indexer.

PNW/ASI Spotlight: An interview with Sheila Ryan (continued)

If someone had told you early in your indexing career that you would win the Excellence in Indexing Award, what would you have thought?

What I greatly value about the Excellence in Indexing award is the fact that the judging committee is made up of a group of other indexers. Knowing that the award is based on the esteem of my professional colleagues is very gratifying. I will have completed six Churchill volumes for this client when I finish Volume 23 later this year, and one thing that is interesting about these projects is that the client wanted to have linked indexes. I used the scripts that Jan Wright and Olav Kvern developed to create an HTML-coded output file of each index, because when I started working on these volumes 5 years ago it was the best option that I knew of for helping a client to create a linked index. The linked indexes work great in the eBook versions of each volume, and even though the award-winning index was not judged on the basis of having a linked index, I am extremely happy that each volume that I have indexed for this client includes this feature.



Sheila celebrating with Portland-area indexers in early April.

If you were starting your indexing career again what would you do differently? Does it translate into any advice for newcomers to the profession?

I'm not sure that I would do anything differently. Taking indexing classes required time and focus but I was able to complete all of the coursework fairly easily. When I started my indexing business, my husband and I had just moved to Portland and I was extremely fortunate to be able to focus on indexing full time (I did not have to moonlight as an indexer while working another job). My advice to newcomers is: **Don't sell yourself short.** Do not underbid or charge less than what your time is worth. We are professionals offering a highly specialized service and we should be paid accordingly. Keep track of the time you spend on each project, figure out what your effective hourly rate is, and aim for an hourly rate of at least \$75/hour. Another thing that new indexers should seriously think about is attending publishing-related

conferences that are not just focused on indexing. I have been a member of PubWest for many years and have established several long-term client relationships directly as a result of attending their annual conference.

If you could choose the ideal project for yourself, including topic, what would it be?

The ideal project for me is an interesting topic. Some of the projects I have enjoyed the most have been for the Wisconsin Historical Society Press, because I grew up in Wisconsin and many of the titles published by this Press have personal resonance for me. Regardless of subject matter, ideal work situations include clients who communicate well, projects with good page rates/project fees, and plenty of time to complete the index!

How does ASI and PNW membership impact your indexing life?

The PNW chapter has been particularly helpful for my career as far as networking and getting to know other indexers and getting job referrals (and eventually being able to provide job referrals to others!) I attend national conferences when I can, but the regional PNW network has been the most helpful in building my indexing business.

ASI 2019 Conference in Scottsdale: One Indexer's Experience

by Sam Arnold-Boyd

The American Society for Indexing 2019 conference, April 25-27, began for me on Friday morning with a PNW chapter gathering. A group of ten or so of us chatted and shared about Sheila Ryan's award and PNW's upcoming September meeting. Next, I faced the most difficult challenge of a conference: choosing between simultaneous sessions. I selected Introduction to Scripture Indexing with Richard ShROUT and Elizabeth Walker and learned about the SBL Handbook of Style and how the Wikipedia entries for religious categories are very helpful. After the morning break, I headed to Zoological Indexing with Max McMaster. Max provided guidance in grouping animals according to their genus and species as well as creating multiple postings to cover all the different names for one animal.

The keynote speaker for the Friday lunch, Colin Pearson, is an archivist at the Musical Instrument Museum (MIM) of Scottsdale. Their method of classifying musical instruments from around the globe is based on the primary means of sound production and results in such fascinating results as the piano being a "keyboard zither" and a banjo being a "plucked spike lute." We learned that the keyboard is not an instrument, but rather an interface. New perspectives disturbed familiar concepts!

In the afternoon, my first stop was to learn how to use Computer Tablets for Marking Up Proofs from Joan Shapiro, Richard ShROUT, and Jennifer Spanier. I now know that I can use an iPadPro with PDF Viewer (a free app suggested by Maria Sosnowski) to replace the use of paper and endless ink/toner. The last session of the day was an easy decision for me since I am a Cindex user and wanted to learn about the new release of version 4 from Frances Lennie.

A highlight of the conference was the reception and Award Presentation, held at Western Spirit: Scottsdale's Museum of the West. This beautiful venue provided a comfortable backdrop to get to know more indexers and then to congratulate PNW member Sheila Ryan, the recipient of the Excellence in Indexing Award.



On Saturday, I began my day learning about the Benchmarks of Quality Indexes with Nan Badgett and Janet Perlman. Nan, the author of *The Accidental Indexer*, and Janet, the author of *Ten Characteristics of Quality Indexes*, discussed the commonalities among various lists, which includes the Best Practices for Indexing on the ASI website. My next session opened my eyes to paths for an increased pay rate. And the Pay Rate Is... ,with Janet Perlman, Ina Gravitz, and Lisa DeBoer, presented suggested pay rates and approaches for asking for a raise from established clients.



After lunch and ASI's Annual Business Meeting, I had the privilege of sharing the PNW chapter's approach to meetings in a session called Planning Chapter Meetings. Though the turnout for this session was small, I hope that good information was shared in a coherent way. I learned a lot! The last session of the day for me, Open Web Vocabularies with John Magee from Gale, provided guidance in accessing and using such resources as VIAF (Virtual International Authority File), Wikidata, and ASI's online thesauri at <https://www.asindexing.org/about-indexing/thesauri/online-thesauri-and-authority-files/>.

The sessions are the focus of a conference, but the lunch, breaks, receptions, and dinner times are my favorites because they are great for getting to know other indexers. Meeting fellow indexers from across the country and the globe is an enriching experience both professionally and personally. It makes the conference worthwhile because the benefits of these interactions can't be duplicated in any other way. You just have to be there!

Sam Arnold-Boyd is Program Chair for PNW/ASI.

ISC-SCI 2019 Conference in Montreal, Quebec: Highlights

by Judy Gibbs, Write Guru®, and Ronnie Seagren

The Indexing Society of Canada held their annual conference May 24 -25 at the University of Ottawa. The conference was followed by a one-day special session on indexing names by Enid Zafran.

A theme running through the last three Canadian conferences is decolonization. The 2017 conference in Montreal opened with a two-hour panel discussion by the team who indexed the five-volume Truth and Reconciliation Report. The intense content combined with the difficulties of making details accessible for all the people who want to find information made it a very strong experience for the indexers. The 2018 conference in Winnipeg closed with a presentation by the late publisher Greg Younging on writing by and about Indigenous peoples.

This year's conference in Ottawa included a presentation on the classification of Indigenous materials by Camille Callison and Katherine Kasirer. The Brian Deer classification system for Indigenous materials is used for the University of British Columbia's Indigenous collection, with variations for other First Nations collections. The talk illustrated how Canada's National Film Board is using the Indigenous Knowledge Materials Classification Scheme (IMCS) to create "respectful and accurate access points" for Indigenous film. This approach addresses historical stereotypes, bias, and varied Indigenous perspectives.

Enid Zafran presented about indexing scholarly books. The pressure on faculty to publish results in a steady stream of scholarly books, usually targeted to specific audiences. Sales volumes tend to be low; most of them sell fewer than 300 copies.

The conference ended with a fascinating panel with an indexer, an editor, and a publisher discussing ethical choices faced by indexers.

Enid's special class on Sunday covered a wealth of material on names from entry strategies to placement to what names to include, reinforced by exercises. Judi, even with her long years of indexing, picked up new information. The session also reinforced some practices that have been instinctive for us.

Ottawa has a number of interesting museums. We both found the most interesting one to be the Canadian Museum of History (formerly known as the Museum of Civilization), in Gatineau, Quebec, just across the river from Ottawa. The organic, curvilinear complex was designed by First Nations architect Douglas Cardinal, who combined diverse Indigenous forms with European expressionist influences. The Grand Hall on the first floor is more than three stories high, overlooking the Ottawa River and Parliament Hill. The tall ceiling accommodates even the tallest totem poles—and the entire floor is Indigenous. Other floors covered other aspects of Canadian history, from prehistory to immigration to diverse Indigenous influences. The residential schools receive significant coverage in these exhibits.



Wladyslaw: Wikimedia Commons
File:Gatineau_-_QC_-_Museum_of_Civilisation3.jpg

Next year's conference will be in storied St. John's, Newfoundland. We're looking forward to meeting with other indexers in North America's easternmost city!

Judi Gibbs is president of the Write Guru®. She is a member of ISC-SCI.

Ronnie Seagren is a member of ISC-SCI.

Remembering Erica Caridio

Longtime ASI/PNW member Erica Caridio passed away on the first of May of ovarian cancer. She died peacefully, surrounded by her family, after eight months of treatments. Erica lived with her spouse Bart and daughter Brianna on their farm in Cottage Grove, Oregon. The newspaper in the nearby town of Creswell carried a tribute to her that conveys many of her talents, pursuits, and values. Access it at <https://www.thecreswellchronicle.com/story/2019/05/16/news/remembering-erica-caridio-a-community-staple/1970.html>.

Erica opened her indexing business, The Last Word Indexing and Design, in 2009, and became a treasured member and volunteer for ASI/PNW. She took on many jobs over the years, including managing the PNW listserv and being co-webmaster of the PNW website. She will be missed for her practical contributions but most of all for her calm and graceful presence. As her daughter Brianna, in a Facebook post that was widely shared, remembers: "I knew that she was loved, but I've learned more and more recently how she made such special and unique connections with every single person she knew. She had an ability to make every situation, good or bad, better by being there."

The obituary for Erica in the Eugene Register-Guard is at <https://www.legacy.com/obituaries/registerguard/obituary.aspx?pid=192925151>. A memorial potluck to celebrate her life was held on the Caridio family farm on June 23, and Sam Arnold-Boyd was able to attend and extend condolences to Bart on behalf of all the indexers, who hold Erica in such high esteem.



A sampling of tributes about Erica from indexers:

She was always incredibly supportive.

I've always admired her calm and her presence. She was a really wonderful person.

What a beautiful person!

Erica was a wonderful person who brought competence and collegiality to our profession. Her warm and gentle spirit brightened our peer reviews, our chapter meetings, and our officer communications. It was always a pleasure to laugh and learn with her.

Erica was a mentholatingly calm but sparkly presence. She was a gifted artist, craftswoman and intellectual; gentle, gracious and elegant.

She was a wonderful soul.

She was such a wonderful person. I always enjoyed her positive attitude, her warmth, and her bright mind. She will be missed.

She was such a wonderfully attentive and caring and kind soul. I interacted with her most for my last trip to present to PNW at the Bastyr University setting a few years ago... and I loved how completely she handled all the tasks... and how she interacted with me. She was a person who always brought a smile to my face when I thought of her.