



KeyWords

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Showcasing PRO BONO Work

and the Benefits of Collaboration

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Showcasing Pro Bono Work and the Benefits of Collaboration

Abstract

The following article details a recent pro bono indexing project by the authors for the Lycoming County Genealogical Society (LCGS) based in Williamsport, PA. It is our intention to detail the project as an example of a positive collaboration between an experienced indexer and an emerging indexer. We believe that pro bono work can be a fantastic way to transition from an indexing course, after your bookshelves have been exhausted of sample indexes and you are yet to secure a paying client as a new professional indexer. To be able to work with a helping hand and receive a professional's support is invaluable to raising the success rate of indexers in the field of professional indexing. It is the authors' hope that the benefits of the process of pro bono work described here will reignite the interest in providing a structured pro bono program within ASI's regional chapters and SIGs.

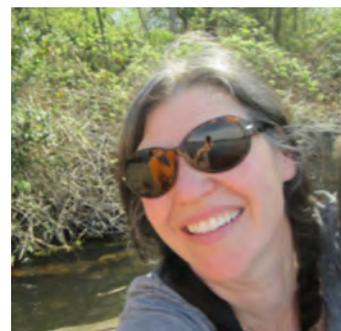
Project Details

The *Lycoming Lineage* newsletter (published by the Lycoming County Genealogical Society or LCGS) is issued six times a year and contains articles on all aspects of Lycoming County, Pennsylvania history and genealogy. LCGS is a non-profit organization dedicated to the encouragement of research, publication, collection and preservation of genealogical materials.¹ The newsletter's cumulative index covers issues from 2007-present and is used by the very active band of genealogy researchers of the region. It includes all personal names (including birth, death and bible records), place names, authors, and subjects from articles on research practices and tools. **Beth Nauman-Montana** indexed volumes XXV (no. 3) through v. XXVII (no. 4). **Amron Gravett** indexed volumes XIX (no.1) through XXV (no. 2), XXVII (no. 5) through v. XXX (no. 3), and is continuing to work on issues back to 2002.

Project History

The *Lycoming Lineage* indexing project came about when Beth met the editor of the newsletter while visiting family in Pennsylvania. Beth had been indexing medical journals for several years and offered to index *Lycoming Lineage* as a way to do some pro bono work for a non-profit in a subject area that was new to her. The project initially involved indexing PDF files of the most recent issues, but grew in scope as hardcopies of older issues were located and passed on to her. Despite her best intentions, it became more and more challenging

BY AMRON GRAVETT AND BETH NAUMAN-MONTANA



Amron Gravett has a Masters in Library Science and 13 years experience as a librarian and information professional. She has recently transitioned to become a freelance indexer completing the UC Berkeley's Extension course Indexing: Theory and Application with Heather Ebbs. More information about her work at Wild Clover Book Services can be found at www.WildCloverBookServices.com. She can be reached by email at Amron@WildCloverBookServices.com. When not working, she runs rivers and trails with her family around the Four Corners region.

Beth Nauman-Montana is the owner of Salmon Bay Indexing. She has a Masters in Library and Information Science from the Information School at the University of Washington and is a long time member of the Pacific Northwest Chapter of ASI. In addition to indexing books, she also provides taxonomy consultation services. Beth lives in Seattle, WA and enjoys cooking, volunteering in her sons' school library and spending time with her family.

to balance the demands of paying clients with the experience of pro bono efforts. The project received less attention than Beth felt it should, so she began to look for another indexer to share the load. Having worked on several pro bono projects in the early stages of her career, Beth contacted *Sherry Smith*, Pro Bono program coordinator for her local ASI chapter in hopes of finding another indexer. Unfortunately, no volunteer indexer was available and the project sat on the back burner for a few more months.

Networking Leads to Collaboration

On a random chance of good luck, Amron was visiting Seattle and reached out to Beth for a coffee chat about life as an indexer. During their initial meeting, Beth discussed a pro bono project that she was looking to pass along and Amron agreed to take it on with Beth's mentoring support.

Collaboration Logistics

When collaborating with other indexers, file sharing is an important consideration. There are two main issues that need to be addressed. First, the files to be worked on need to be transferred between the indexers. This is most easily done via email attachment or the shared access to a cloud storage service such as Dropbox or Google Drive. Second, the index files will need to be accessible by indexers who may not be using the same software. It may be necessary to use the export/import features in order to collaborate successfully.

At the onset of our project, Beth uploaded PDF files of the newsletters and the indexes to date in .sk7 and .txt formats via Google Drive. In our case, we do not use the same indexing software. Beth

uses SKY7 and Amron uses Cindex 3.0. Amron imported them into her Mac and for the next month, indexed the 14 issues first at a rate of 1.5 hours per issue increasing her speed to .75-1 hour per issue. Completed files were emailed back to Beth who reviewed, offered suggestions for edits, and ultimately forwarded the final index on to LCGS. Beth acted as mentor, editor, and liaison throughout the project providing consistency and the professional eye that Amron was still acquiring.

Genealogy Indexing Peculiarities

With genealogical indexing, there are specific problems and issues that need to be addressed by both editor and indexer throughout the project. For the *Lycoming Lineage*, if there was a discrepancy with a name, all variations were indexed (eg. Houseknecht/Haussknecht/Hawsknecht). The reason being that genealogy researchers follow trails of information often left by poor handwriting on the back of photographs, letters or incorrectly transcribed from census records. Therefore, spelling variations are common. As well, each article contributed 2-4 headings on topics such as the latest research tools, archive collection details, and property histories.

Serials Indexing

One of the biggest challenges with serials indexing is creating a sustainable structure for the entire run of issues. One year, the articles and format dictates a very clear method of indexing. The next year, that same structure might not be as relevant because of a change in the editorial staff, scope of editorial coverage, topics and detail. In order to create a sustainable structure for the index, it benefits the indexer to preview issues from a number of years before beginning the project. When indexing a 10-100 year run, this is not always possible. The indexer is then required to shift and revise the term selection and structure as needed, often taking more editing time than on a regular back of the book indexing project which has the benefit of cohesive coverage throughout the manuscript. Sometimes, it may also become necessary to revise the previous index to flow with new changes.

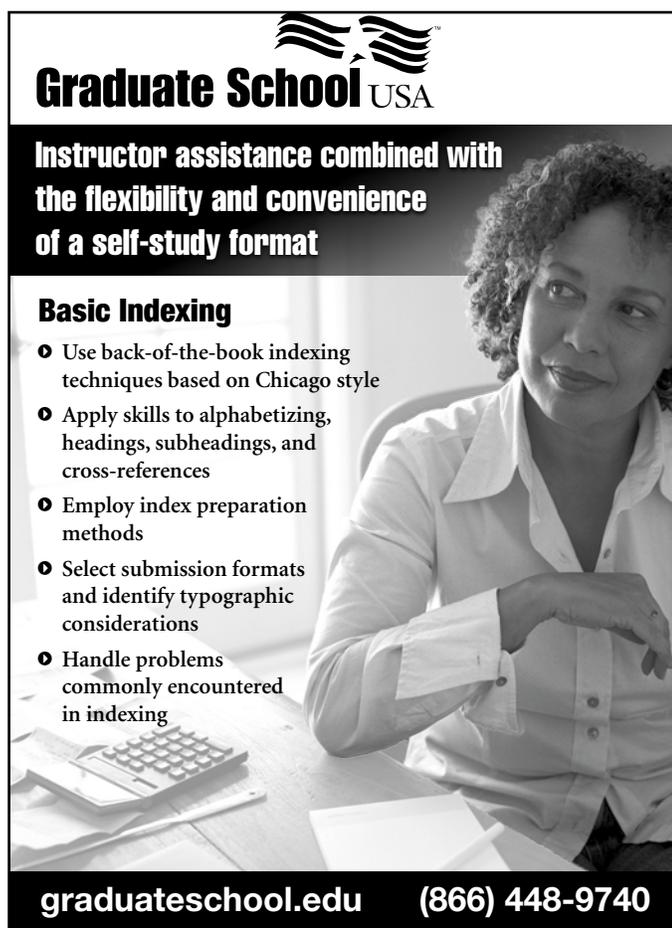
For example, with the *Lycoming Lineage*, Beth began pulling terms under a heading "research resources" but after Amron continued indexing later issues that heading became too great to be useful and the locators were moved to main headings on their own. Out of date terms used in earlier issues were later replaced or double posted under their modernized terms where appropriate.

Other challenges of working with serials are inconsistent or inaccurate numbering of issues and omitted issues, both of which were encountered in the LCGS project. It is also important to use a format for the locators that will be intuitive for the users of the index. For the LCGS locators, we chose to use a standard format that includes volume, issue number and page number and is consistent with the style used in the newsletter:

maps, v. XXVI (no. 5): 66, v. XXVIII (no. 2): 17, v. XXVIII (no. 4):
53
Marlow, Margaret (Logan), v. XXX (no. 1): 7

Pro Bono Work

When discussing the value of pro bono work, one cannot help but refer to the reputation of pro bono work done by lawyers. "The American Bar Association urges all lawyers to provide a minimum of 50 hours of pro bono services annually." The Rules of Professional Conduct "highly encourage, orchestrate and support opportunities for pro bono work."² Another leader in the field of volunteer professional activity is the American Library Association. This



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Basic Indexing

- Use back-of-the-book indexing techniques based on Chicago style
- Apply skills to alphabetizing, headings, subheadings, and cross-references
- Employ index preparation methods
- Select submission formats and identify typographic considerations
- Handle problems commonly encountered in indexing

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organizational powerhouse highly instruments and supports new professionals through MentorConnect³, Emerging Leaders⁴, and other initiatives that promote the highest level of professionalism, engagement and innovation. In so doing, they have elevated the visibility of librarians *and* transformed the entire profession. By coordinating pro bono efforts, the measure of value for the emerging professional, the mentor, the association and the profession as a whole is great.

Indeed, there are barriers to organizing a pro bono program. Among them are the challenge in locating projects, the lack of professional encouragement and the isolation and time constraints of the participants. However, we see the value for all involved and most especially for the new professional seeking work. After completing an indexing course, and exhausting their own bookshelves to create sample indexes, often new indexers are not yet confident enough to approach editors and state their professional chops. A pro bono project is a wonderful practice in client and project management, communication and indexing. It is a natural confidence booster allowing the new indexer to be able to truthfully state, "I am an indexer!" Some are not comfortable networking with unknown persons and an established program bonds those professionals through a specific project. This establishes the infrastructure for a possible future working relationship in other capacities (for example, as a subcontractor or committee collaborator).

Future of ASI Pro Bono Programs

We believe that the goals of any pro bono program should be the following:

- To support and increase the rate of success for emerging indexing professionals
- To provide an additional tool for developing indexing and client management skills
- To recognize the efforts of all participants in order to promote their experience, garner referrals and develop a client list
- To provide a sustainable program that encourages experienced indexers to actively support and engage with emerging indexers

Often pro bono work has the false reputation of simply providing free work that competes with other professionals receiving payment for the same service. However, we believe that a successful pro bono project will lead the indexer to engagement with other indexers *and* clients and that securing projects with this intention should be a high priority for the coordinator. Rather than simply volunteering, the pro bono programs should foster the type of project that will provide a launch pad for the newly trained indexer. Pro rating or steeply discounting indexing services can provide that added value to both organization and indexers, as well as a minimal stream of revenue for all participants. It could also be included as a pre- or post-graduate step of indexing courses by supporting that precarious transition from student to professional.

Current Pro Bono Programs

Australian and New Zealand Society of Indexers (ANZSI)

Mary Russell, President of Australian and New Zealand Society of Indexers (ANZSI), contributed very valuable input on managing major pro bono indexing projects. Last December, she organized 30 participants to index 40 years of the ANZSI Newsletter (formerly AusSI Newsletter). Her participants "have ranged from those with very little indexing experience to experienced indexers who have not indexed newsletters before, to those just wanting to participate to a good cause and, others who wanted to receive a peer review." The project included locating and scanning all issues, creating a detailed style guide and merging all completed indexes into one index in SKY.

She spoke about the editing process of this endeavor at the ANZSI Conference this year⁵ and is also working on a summary article to help other coordinators embarking upon the same type of large-scale projects.

Special Interest Groups (SIGs)

Several SIGs have had a pro bono program off and on over the years with occasional activity. In May, the Webmaster of the Web and Electronic Indexing SIG, *Dwight Walker* canvassed members in order to re-launch their pro bono program. Their SIG manager, *Christine Graham*, formed a 3-member team and invited 3 volunteer indexers to create a web index for a non-profit society. Skills needed for the project were indexing, project management and Web design. The full specifications and project details can be found on the SIG's website⁶. The Taxonomies and Controlled Vocabularies SIG has an organized (but inactive) program with details on the SIG's website as well⁷. Other SIG coordinators indicated they would like to revisit the idea because of renewed interest but cannot see where the time will come from their already busy work schedules.

Local Chapters of ASI

ASI Pacific Northwest Chapter has had the most established pro bono program, successful for 12 years. Coordinator Sherry Smith spoke with Amron about some of the biggest challenges and successes of the program. Sherry stated that the most glaring problem was the erratic time intensiveness of it. For approximately 70% of the time, the resources don't quite match up. That is, they will

(continued on page 116)

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Teamwork: ICRIS, the International Committee of Representatives of Indexing Societies, gathers during each indexing conference to share news and collaborate on issues of interest. Pictured here are the representatives after their informal meeting during the recent ASI conference in San Antonio, Texas (left to right): **Mary Russell** (ANZSI, Australia and New Zealand Society of Indexers), **Pilar Wyman** (ASI, American Society for Indexing), **Caroline Diepeveen** (NIN, Netherlands Indexers Network), **Judy Dunlop** (ISC/SCI, Indexing Society of Canada/Société Canadienne d'Indexation), and **Maureen MacGlashan** (SI, Society of Indexers).

The first afternoon concluded with a panel presentation on indexing software tools Macrex, CINDEX, SKY Index, and TExtract from *Gale Rhoades*, *Frances Lennie*, *Kamm Schreiner* (via video), and *Harry Bego*, respectively.

This conference was joint with that of the Editors' Association of Canada (EAC), so Saturday morning we were treated to their keynote speaker, renowned journalist Robert MacNeil of *The MacNeil/Lehrer Report*. As

EAC tweeted, "How cool is that?"

MacNeil was raised in Halifax, so regaled us with stories from his childhood as well as his professional career. "Adventure dies in domesticity," he said. Interestingly, his early training as a journalist with Reuters included one-line stories, not unlike 140-character Twitter status updates of today. He appreciates well his editors, including those with fur-collar kittens. It was a pleasure to hear him speak.

After the EAC keynote, indexers convened back to the Britannia Room for a few more sessions on indexing. We began with *Elaine Ménard* on "Image Indexing: TIIARA, a Bilingual Taxonomy to the Rescue!" wherein Ménard gave us an update on her Taxonomy for Image Indexing And Retrieval (TIIARA) project. (See also Iva Cheung's blog report from last year's ISC/SCI conference and, for more recent summary, "TIIARA for an IDOL: an adventure in indexing" in *The Indexer*, Volume 31, Number 1, March 2013, pp. 2-11.)

Ménard reported that suggestions made by indexers have been deemed "invaluable" and will be taken into consideration as the taxonomy is maintained. The next phase of the project will include user testing and testing retrieval of images with TIIARA. "Coming soon," she grinned.

Next, *Marnie Lamb* led a panel discussion with Mary Newberry, Margaret de Boer, and Marjorie Simmins on "Indexing a Memoir: Michael Bryant's 28 Seconds." They addressed how the author's name should be indexed, how to decide which proper names are worth including in the index, how to maintain the author's perspective, and more.

Then our own *David Ream* and *Ronnie Seagren* presented "A Walk Through the EPUB3 Indexes Specification." They showed some of the tagging elements and shared the current status of the Indexes module of the new EPUB3 standard.

It was a full two days. Thank you! ●

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have three indexers looking for projects and nothing to offer, or three projects and no indexers. The coordinating committee (ideally 6 members) manages the program by reviewing applications from organizations and indexers. Once an organization's application is approved, one of the approved indexers and one of the mentoring indexers are recruited for the project. Sherry believes that a pro bono program is truly a win-win situation. The non-profits receive a top-notch index that would not be affordable otherwise. The mentors feel great because they have nurtured fledglings in the field. The new indexers have polished samples for their portfolios. She also believes that one of the greatest benefits for the emerging professional is the solidification of one's self image as a professional indexer.

Several chapters including the Rocky Mountain Chapter and the Upper Midwest

Chapter are currently organizing a program for members.

Thank you to all of the indexers that responded to inquiries regarding their experience with pro bono work. If you or your ASI chapter is interested in getting involved, join the Pro Bono Interest Group by emailing Amron at Amron@WildCloverBookServices.com

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Additional Resources

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