Teaching book and periodical indexing at Liverpool

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The School of Librarianship and Information Studies at Liverpool Polytechnic runs two full-time courses—a three year degree course leading to a BA (Honours) in Librarianship and a one year postgraduate course leading to a Diploma in Librarianship. Both the degree and the diploma are awarded by the Council for National Academic Awards (CNAA).

A major element of both courses is 'Organization of Knowledge', which deals with the ways in which recorded knowledge is organized in libraries and information services to allow effective exploitation and speedy retrieval of information as required. This refers in particular to traditional classification and cataloguing systems and modern indexing methods such as chain indexing, PRECIS and the applications of the computer.

Book indexing is also regarded as an essential part of the organization of knowledge, for if a book does not have a satisfactory index it is impossible to retrieve information from it and thus the knowledge which it contains has not been properly organized.

The method used to teach book indexing is to provide a 45-60 minute lecture followed by a practical assignment by the students. The marks awarded to this assignment count towards the final assessment for the degree or diploma.

The formal teaching

The lecture takes place after students have received a thorough groundwork in the basics of classification, author/title cataloguing and subject indexing. Thus we

LIVERPOOL POLYTECHNIC—DEPARTMENT OF LIBRARY AND INFORMATION STUDIES

BA2—ORGANIZATION OF KNOWLEDGE (PRACTICAL)

THE BLACKCOUNTRYMAN—INDEXING SPECIFICATION

1. Make each entry on a 5 by 3 inch catalogue card.

2. Index under authors (including authors of reviews) and letters, distinctive titles, some form headings (e.g. book reviews, humour, poems, obituaries) (superior letters refer to examples below)

3. Index significant material within articles, without over-indexing (e.g. an article on canals which contains a large amount of information on the Tipton Canal should be indexed under TIPTON CANAL, but it would be impractical to index every canal mentioned)

EXAMPLES

a Fletcher, J. M.
   Wednesbury spots and boxes. 1(1) 18-20

b Raybould, T. J.
   The economic emergence of the Black Country (review) 6(4) 63-5
   Haden, H. J.
   Review of The economic emergence of the Black Country (Raybould) 6(4) 63-5

c Boodt, Mrs. M.
   letter 6(3) 72

d CHURCHES
   Historic churches of the Black Country and its borderland (J. S. Roper) 6(2) 23-8

e 'Ali the learner' (H. L. Kershaw) 6(2) 49-51

f BOOK REVIEWS
   The collector's book of Wedgwood (M. Klamkin) 6(1) 68

g h i similar entries to the above

Enter Black Country Society news, activities, etc. under BLACK COUNTRY SOCIETY
   Activities

Figure 1. Handout given to students indexing The Blackcountryman.

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are able in the lecture simply to mention that many of the points already studied are equally relevant to book indexing—for example, filing rules. We point to the relationship between the establishment of name and subject headings for a library catalogue and similar headings for a book index. A further relationship is that a book index brings together scattered references to a topic just as the index to a classification scheme brings together aspects of a subject which have been separated in the schedules of the classification.

Other points covered in the lecture include

(a) the need to avoid over-indexing, remembering that an index is not a concordance and that the appearance of an entry in the index assumes that one will find some information relating to that subject in the text;

(b) the use of ‘double entry’ rather than ‘see’ references, except as an economy measure; for example

Common Market see European Economic Community
EEC see European Economic Community
European Economic Community
Britain’s membership 221-7
Edward Heath on 205
establishment 204
Norwegian referendum on 220

(c) the need to provide subheadings as appropriate rather than having long strings of undifferentiated page numbers;

(d) the importance of the final editing of the index.

We also refer in the lecture to the work of The Society of Indexers in raising the standards of book indexing and the status of indexers; to the value of The Indexer, not least in its inclusion of extracts from book reviews relating to good and bad indexes; and to the Wheatley Medal and the criteria adopted in selecting the winning index. At the conclusion of the lecture we recommend that students read at least Mrs M. D. Anderson’s excellent pamphlet, Book indexing (Cambridge University Press, 1971), and British Standard 3700:1976; we
SOME NOTES ON INDEXING 'NORTH-WESTERN NEWSLETTER'

1. Index (a) articles, under author, subject and title where appropriate; also index significant material within articles.
   (b) reports of meetings and other activities, under corporate body holding meeting, writer of report, and, where significant, authors and subjects of papers—but not very brief reports of papers which say little about the subject
   (c) book reviews, under author and short title of book reviewed and writer of review
   (d) obituaries, under writer and subject of obituary
   (e) letters, under author and subject

2. Do not index
   forthcoming activities
   announcements of future publications etc.
   publications received
   casual mentions of names (e.g. examination successes, committee members, speakers at meetings) or subjects (e.g. uninformative reports of papers at meetings)

3. Give name headings according to AACR.

4. Give locations as follows: no. of issue (in parentheses) followed by inclusive page references

SOME EXAMPLES
(a) Lancour, Harold
   Some observations on library education in Great Britain. (10) 3
   Education for librarianship. (10) 3
   Library education. (10) 3
   Professional education. (10) 3

(b) Library Association, Reference and Special Libraries Section.
   North Western Group
   Meeting at Liverpool 1953. (21) 4-5
   Gray, D.
   Report on R. & S.L. Section, N.W. Group, meeting 1953. (21) 4-5
   Chandler, George
   Liverpool Technical Library and its services. (21) 4-5
   Johnson, A.
   What industry wants from Liverpool Technical Library. (21) 4
   Liverpool City Libraries: Technical Library. (21) 4-5

(c) Horrocks, Sidney
   The state as publisher (review). (14) 6
   State as publisher, The (Horrocks) (review). (14) 6
   Whatmore, Geoffrey
   Review of The state as publisher (Horrocks). (14) 6

(d) Powell, Phyllis E.
   obituary. (21) 3

(e) Smyth, A. L.
   letter. (21) 7
   Association of Assistant Librarians, Manchester and District Division. (21) 7

Figure 3. Handout given to students indexing North-Western Newsletter.

also mention other works such as those of Collison and Knight. We know that the keener students do read these.

We obviously illustrate the points made in the lecture by referring to examples of good and bad indexes. An index compiled by a team of Liverpool students under the supervision of the present writer is examined, not to demonstrate how good it is but simply because the lecturer’s association with it means that he knows it very well. Indeed, I am quick to point out at least one fault in the index:

PRECIS (BNB subject index project), 5, 42, 48-51, 101, 105b
rotated index, in BNB, 101

As PRECIS and the British National Bibliography’s rotated indexing are one and the same, the page references should have been identical.

The index referred to above, that to UK MARC Project (Oriel Press, 1970) is one example of the practical results of our teaching of book indexing. Another is Seminar on the Anglo-American Cataloguing Rules 1967 (Library Association, 1969), which also was indexed by a group of students under my supervision. The opportunity to apply their indexing skills and to see the end product obviously makes the teaching more meaningful than it would otherwise be.

The assessment of students and team efforts

It is, however, necessary to assess students on their work, and we are not always in a position to use an index commissioned for publication. We therefore ask our students to index, as if for publication, periodical articles or papers given at conferences. Their efforts are discussed with them and marked according to the following scale:

The work was supervised and edited by K. G. B. Bakewell, a Principal Lecturer in the Department.

Because so many people were involved in the compilation of the index, there might be some inconsistencies in the depth of indexing—though it is hoped not too many! As a general policy, the following have been indexed:

- articles and reports (under author and subject);
- reports of meetings and similar activities (under corporate body holding the meeting, writer of the report and, where significant, authors and subjects of papers);
- book reviews (under author and short title of book reviewed and, when known, writer of review);
- obituaries (under subject and, when known, writer of obituary);
- letters (under writer and subject);
- appointments

Excluded are:
- details of forthcoming activities, future publications and developments, etc.

The following abbreviations are used after the names of persons:

- (A) an article, report or note by the person named;
- (I) an illustration;
- (L) a letter from the person named;
- (N) a news item or article about the person named;
- (R) a review written by the person named. (This is also used for entries under the author and short title of the item reviewed);
- (S) a report of a speech by the person named.

These abbreviations are also used in the index to The Library Association Record, following the recommendations of a Working Party of the Library Association Cataloguing and Indexing Group (of which the editor of this index was a member).

Finally, account has been taken of the following standards in compiling and arranging the index:


‘Word by word’ arrangement is therefore used rather than ‘letter by letter’, and acronyms and groups of initials file as words.

Some years ago we combined this method of assessment with a more ambitious project, which unfortunately did not reach full fruition. Each second year undergraduate was asked to index one issue of The Blackcountryman, a local history journal published quarterly by the Black Country Society. A 'handout' (see Figure 1) was given to each student, explaining some points of methodology, and each index was discussed with each student and marked in the usual way. This exercise brought home some of the difficulties of maintaining consistency when indexing a run of a periodical as a team, even though one thinks that every problem has been anticipated. For example, to what
extent should photographs be indexed? How can one agree on the depth of indexing required? Should letters be indexed under topic? I have been rebuked by one colleague for not indexing advertisements.

It is most regrettable that, although we compiled the index at the specific request of a member of the Black Country Society's Executive Committee and to the exact specifications agreed with her, the Society felt unable to publish the resulting index to the first six volumes of the journal because of its size—in spite of a request from the Local Studies Librarian at Birmingham Public Libraries that it should do so. It is a sad reflection on the British public library system that the Society felt that not enough libraries would purchase the index to allow the cost of publication to be recovered. It is also ironical that the index could so easily have been much shorter had we not worked to the specifications agreed with the Society's representative! A section of the index is reproduced at Figure 2.

Our students were therefore not able to see the results of their labours in print, but most of them enjoyed the exercise, which allowed us to achieve one of the objectives of our degree course—the integration of a professional subject with a non-professional one (English
Social History). On a personal level, I was gratified to be awarded Honorary Life Membership of the Black Country Society as a reward for my efforts in supervising the index—though I would still like to have seen the index published or, at the very least, some reference to it in *The Blackcountryman*.

Another team effort has had a more satisfactory result. Ninety-two students (undergraduates and postgraduates) assisted in indexing *North Western Newsletter*, a periodical published by the North Western Branch of the Library Association and the North West Division of the Association of Assistant Librarians between 1950 and 1975, and this index was published by Liverpool Polytechnic School of Librarianship and Information Studies in 1980 (and reviewed in *The Indexer* 12 (3) April 1981, 162). Again, a specification was drawn up for the index (see Figure 3); this was modified slightly during the final editing (see the introduction to the index, reproduced as Figure 4). An extract from the index is reproduced as Figure 5.

The index appears to have been successful. When he received his copy, the Librarian of the British Library (Library Association Library) wrote to ask if we would consider indexing CABLIS, the British Library’s current awareness bulletin. It looks as though our next student project is in hand!

The Wheatley Medal 1980

The Wheatley Medal, annually presented since 1962 for an outstanding index, was awarded for 1980 to the index to *A librarian’s handbook*; volume 2: supplementary papers and documents, containing new policy statements, standards of service and memoranda of evidence, and a fully revised directory section; compiled by L. J. Taylor; an update and complementary volume to the 1977 edition.

The indexing of *A librarian’s handbook*; volume 2, was undertaken by its compiler, Laurie J. Taylor. He is an Associate of the Library Association and formerly Librarian of the British Library (Library Association Library), now the proprietor of Tamarisk Books. Mr Taylor is the author of *Copyright for librarians*.

Only twelve indexes were submitted for the award of the Library Association Wheatley Medal 1980; a regrettable decrease from the twenty-one recommended for the previous year. The quality of the indexes was more variable than in some years: the length varied from a few cursory pages to a substantial volume, and while all served their purposes reasonably well, some showed elementary errors and others an unorthodox approach to their texts. The majority, however, were of a high standard of coverage and accuracy, and the panel discussed their merits at considerable length before agreeing unanimously to the eventual winner.

As the former Librarian of the Library Association Library, Laurie Taylor knows well what sort of documents and information librarians need to have at their fingertips, and produced a most comprehensive index to enable users of the handbook to find them within the 1,072 pages of the current volume as well as from the unsuperseded pages of volume 1 of the *Handbook*. In a profession with terminology including long and similar names at one extreme and a plethora of acronyms and abbreviations at the other, Mr Taylor steered a steady course avoiding emphasis of either full names or acronyms by giving double entry or references as necessary. Besides listing bodies and indenting under them their reports and activities, he also helped the user through a maze of statements from the ominous ‘closures’ to the currency of ‘on-line’, and from catalogue rules ‘AACR’ to the Slovak body ‘Zväz Slovenských Knihovníkov a Informatikov’. Mr Taylor is a worthy winner of the critical acclaim of his fellow professionals.

The panel is always seeking to increase the number of indexes submitted each year, so that it can ensure that an award can be made, and that it represents the best index of the year. Librarians, bibliographers and publishers can all help here.

Please notify the Development Secretary of the Library Association of any indexes to books published in 1980 or 1981 which any of our readers would care to recommend for consideration for the 1981 medal, by 2 February 1982.

R. A. Christophers
Chairman, Wheatley Medal 1980 Joint Selection Panel

Obituary

We regret to record the death on 11 August 1981 of John M. Shaftesley, BA, OBE, FRSA. He was for fourteen years editor of the *Jewish Chronicle*, and compiled its cumulative index, dating from 1841. He was editor too of the Transactions of the Jewish Historical Society. In 1966 he became secretary of The Society of Indexers for one year, and remained on Council until 1976, holding the office of Chairman from 1973-6. He was also a member of our editorial board for four years, and a frequent contributor to *The Indexer*: a most distinguished member of our society, to whom we are glad to pay tribute.