I will look at indexing as a career from the point of view of a freelance worker, as apart from those people working on huge projects, most people who spend a fair proportion of their time indexing, tend to be freelance. I am going to look at freelancing before training, because I feel that it is very necessary to ensure that you have the resources and facilities, financial and personal before you commit lime and money to a training course.

Getting started

For many of us, starting indexing has been a steady slide into it, but more and more people need to look at indexing as a living at a much earlier stage than I ever did. Jobs for life are a thing of the past and many people are getting to middle years now and finding that they no longer slot into the conventional work market, or are burning out and need to change direction. These are the people who are looking at freelance areas as their continuing employment. We need to be sure that we are attracting the right calibre of people, and that they are not coming to us with misapprehensions about streets paved with gold.

It is very unusual for people to come into indexing straight from college. The usual perception is that an indexer has professional expertise or librarianship training. One of the biggest misapprehensions newcomers to indexing seem to be under is that the work will arrive as soon as they are trained. It doesn’t. You need to budget, as with setting up any business, for a long lead time, when you will have invested some capital, but your returns will be low.

The minimum requirements for setting yourself up now are a decent computer and printer, e-mail, telephone, answering machine and fax, as well as filing cabinet, desk and chair. Dictionaries, thesauri and relevant reference books for your subject specialism are essential, although not necessarily in book form. The equipment requires space, so you need a separate room for an office. An accountant is a useful ally at this stage, to let you know just what can be put against tax (when you earn enough to pay any).

Creating an image

So far, so good, but this is all pretty much common sense. How does the work come in? You have done some mail shots (not a very successful method) and one publisher, in the middle of August when everyone else is busy, decides to give you a try. The phone rings and you go into blind panic - the kids start fighting, the dog barks because the door bell has just rung, and you are already late for a dentist appointment. Over the years, you learn that all work is commissioned under these conditions, and the calm response of “tell me about the job, what is your deadline, let me just check my flowchart because I think I have a job due in just then, oh no, that’s the week after, so I can fit it in comfortably” will come in time.

I dread the idea of visual phones — I’m all for keeping up the illusion. An editor recently said she always assumed that I was elegant and raven haired and couldn’t understand how I was old enough to have college age children — I certainly had her fooled. A few experiences of taking on work, and getting the job done well and on time, will give the confidence you need to talk to editors about who you are, what you are capable of doing, and how useful you could be to them. That’s when introductory letters with follow-up phone calls can be really effective.

Isolation

As freelancers, the perception is that you are always working alone. This isn’t necessarily so, as there are various kinds of collaboration possible, as well as mentoring and apprenticeship. Some of us really enjoy doing the job entirely on our own, but it doesn’t mean that we don’t need contacts. Lists like index-L on the net are very helpful in getting to know who people are, and what people’s problems are. Meeting people face to face, if you can get to conferences and regional meetings is invaluable. Not only do you then have people that you can phone or e-mail, but you become involved in the network of passing work on. It is much more effective if, when you can’t take on a job, you recommend one or two people who you are confident could do the job well. At least that way you are keeping it in the family and you may well get a reciprocal good turn one day.

It is quite unusual to meet editors, certainly in Britain — mostly we are commissioned by phone or e-mail and the proofs arrive by post or courier. One of the most isolating experiences we have is the lack of feedback. A resounding silence is the most frequent accolade we get for hours of hard work, often working ludicrous hours to meet tight deadlines. Occasionally, just occasionally, there is the nice letter from the editor or author, or conversely, the tirade from the author who hasn’t a clue how to index, but knows he could have done the job better himself with both hands tied behind his back.

It is self evident that if you are working alone, you should have some sort of strategy for social contact. That is one of my biggest
Indexing as a career — development issues

worries about the next generation of the workforce.

If more and more people are having to freelance and work in tiny, not small, businesses, it will be a very isolating life for young people at a stage when they should be cementing their social relationships.

Developing skills

The decision is made, indexing is the career. But how to learn the skills. It is possible, and certainly permissible, to just decide to index with no training whatever. That way is a very steep learning curve. There are rules, language structure and conventions to be learnt, and mistakes to be made and corrected before your words become immortalised in print. Here we have the division between what John Simkin refers to as "technicians" and professionals. In Britain, there are two training courses specifically for indexing, one run by the Society of Indexers and one run privately.

The SI course is a distance learning course, run as a series of five units (shortly to be four), covering techniques, sources of information, and the business of indexing. It is administered as a series of books to study, which each lead to a test paper, marked by one of a team of markers. A pass mark must be achieved. The final paper requires an index to part of the units, but no complete book is indexed. This is currently under review, as there is concern that although the course itself is comprehensive, there is insufficient weight put on preparing a full index under commercial conditions. The other course, Book Indexing Postal Tutorials (BIPT), is again run as distance learning, with a series commercial conditions. The other course, Book Indexing Postal Tutorials (BIPT), is again run as distance learning, with a series of graded test indexes, but with only one marker. There is much less importance placed on theoretical knowledge than in the SI course, but practical skills are developed more fully. Discussions are under way at the moment to try to combine the best of both courses, and also to look to outside bodies for validation.

SI runs training days for different levels of ability and the person who runs the BIPT course also offers residential training sessions, with individual tutoring. These all require the learner being able to travel to the location. Although Britain may be tiny compared to the USA, transport is slow and expensive. However, training is an investment, and should be part of everyone's ongoing development. Nobody would expect to work in a commercial environment these days without regular training and updating in methods. Similarly, we need to be making sure that we are all developing our own training plans; to keep us up to date and aware of changes. Even if there were more classroom taught courses, access will depend on living close to a centre of population where a course is run. I keep coming back to the moment to try to combine the best of both courses, and also to look to outside bodies for validation.

Self motivation

But what should you expect of training? It all depends what you are going to put into it. If you have a disorganised mind and find deadlines difficult to keep, no amount of training will alter that. The training will be able to teach you the skills, which are then up to you to develop. There is no annual appraisal for a freelancer: you have to be able to criticise your own work and working practices, and sort out for yourself how to improve them, then set targets to make sure that you achieve the improvement. Freelancing is all about self-motivation. There is no one to direct you and no colleague across the office to consult.

Subject specialisation

Having trained, the decision has to be made about what area of work to go into. Is specialization worthwhile, and if so, how to choose appropriate specializations. You may be an expert in seventeenth century silver candle snuffers, but there is unlikely to be a career to be made in a limited field. Conversely, if you are a geographer, that can take you through anthropology, social and economic geography, all the physical geography and climate areas and as far as geology and soil science. It is unlikely that you would have the skills to index research level books across the whole field. There are areas of the sciences that I work in that didn't exist when I was a student. Taking on an undergraduate level book in a newer area of science can be invaluable to find out what developments are going on. There are times, in research areas, when the author is probably one of only a few people in the world who understands what is happening. You will lose no credibility by asking the editor to let you contact the author to discuss how to express new terms and jargon. It is relatively easy to select a specialism if you have a professional background such as law, or computing, where there are a lot of books and updates being published continuously. It is wise not to restrict yourself to areas where there is not a lot of publishing activity, if you want to develop a thriving business.

The role of professional societies

What is the role of the professional societies in all of this? What are they offering the membership, and, more importantly, what should they be offering? A professional society can never be a trade union but it can be a credible force in discussions with the publishing world. It is the responsibility of each of the societies to develop an ethos which is respected by publishers, so that its standards and qualifications bear weight in the commercial world. The Society of Indexers in Britain started from a relatively academic background, forty-one years ago, and in many ways, that has carried us in good stead world-wide. That doesn't mean that the Society expects all the members to be academic, although a recent survey indicated that the average number of degrees per member was two, which makes me feel pretty inferior with just one. What it means is that we have a standing in the academic world, facilities for properly funded and structured research, and a well-respected journal which is bought by academic institutions world-wide, and attracts papers world-wide.

This all means that whatever field of indexing anyone is working in, they have a background of support from a Society which demands respect in the industry. The industry is changing rapidly, as you are all aware, and the Societies must move fast to be able to offer indexers services as business methods change and technology advances. We can no longer send lists of members and their skills to all the publishing houses and sit back and wait for the work to come in. Many of the commissioning and production editors are working from a home base or entirely freelance. A new breed of freelance, home-based project managers is growing up, copy editors and typesetters are being asked to project-manage by the publishers and we have to be able to track all of these people down to let them know that we exist and have services to offer.

Ironically, one of the biggest barriers to change in the Societies

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is the membership themselves. It becomes a security factor to
many indexers to feel that they don’t want the world beyond their
doorstep to change. There is the feeling that moving the services
of the Society on to meet the demands of a changing publishing
industry will somehow damage their own businesses. Part of this
problem is with the Societies and their organization. We all
depend to a great extent on voluntary input, and the sort of
professionalism required by a modern day Society is not taken
seriously enough.

Communication is a big problem here. Officers and committee
members meet, have intense discussions and spend many hours
working out the best way forward for the Society and its
membership. When the scheme is unleashed on to the
membership, they are unprepared, because they haven’t been
through the thought processors that the planners have, and they
feel vulnerable and insecure because they perceive that change
is being forced upon them. Even when the way is carefully paved
with planned articles and items in newsletters, change and its
implications always come as a shock to the members. In Britain
at the moment, we are trying to make our list of indexers for
publishers, Indexers Available, open to professionally qualified
people only. The philosophy behind this, which has been
established for some years, is that the publishers need to know
that when they come to the Society, they will be offered
professionally qualified people. Although a long time span is
being allowed so that members can prepare themselves, it is
producing panic rather than positive action from members, so
we must have got it wrong somewhere. In spite of all the modern
communications technology, we are not particularly good at
getting messages across. This is an area we desperately need to
work on in Britain, a relatively small country, so what the
problems are in the US, Canada, Australia and Southern Africa,
I cannot start to comprehend.

The unstable publishing industry

So far, we have been looking from our side of the fence. What
is across the fence? The publishing industry is in considerable
flux with takeovers, acquisitions and redundancies. There is
nothing stable or reliable about our work source, which is why
we have many of the insecurities I have been talking about. We
don’t know from one month to the next who is going to own the
publishers we work for, which of our editors is going to be
moving on to another company or going freelance, and whether
our name is remaining on the database, being erased, or taken
with the editor to another company. Freelance relationships are
inevitably precarious. The only loyalties we have are built up
over the years with particular editors, but can be smashed
overnight with redundancy or change of job. We all have stories
of publishers we have worked for with commitment, often
burning midnight oil to meet ridiculous deadlines, doing jobs
with ludicrously tight budgets because the next job might pay
better, and then out of the blue, the relationship is terminated
with barely a backward glance. It is probably unwise ever to feel
that an editor is depending on us: freelance means a level of
independence which we must use to our advantage. We can say
that a budget is too tight, a deadline not sensible, a page budget
inappropriate, and there are ways of saying it that can make the
approach professional and not confrontational.

Keeping track of customers

The days of budget-led companies with the employee being of
relatively little importance compared with the accountants’
bottom line are here to stay. As much work as possible is being
put out to freelancers, but the people who commission the
indexes are very often people who have worked within a
company and are freelancing with a major part of their time for
their former employer. Because they are freelance, they cannot
be accessed through the company, and usually work alone so
rarely advertise. Increasingly, people are setting up home pages
on the internet, but it can take time to search these for the sort of
markets we are looking for. The best answer is cooperation
within the Society. Any member knowing any editor who is
moving out of a company to freelance should be encouraged to
feed that information back to the society, so that the editor can
be circulated with society information. Non-conventional
sources also commission indexes; some publishers even take the
view that typesetters are the appropriate people to be
commissioning.

The future

What of the next century? Ever since I have been indexing, we
have lived under the threat of electronics and new technology
usurping us. All I have experienced is increased work loads, and
faster turn round times. Perhaps the next century will see a
reduction in the number of books being published. Currently the
number increases each year. CD-ROM and whatever technology
overcomes it will be a very appropriate way of producing
information books, but there is a smack of cultural imperialism
about any publication which the publishers assume can be
produced only in electronic form. Large areas of the world are
impoverished and even when computer technology is available,
regular power supplies may well not be. At every meeting of
indexers, there are always conversations on the future of our
work. The doom-mongers have been proved wrong and
computers have increased, rather than decreased our work in the
latter part of the twentieth century. The book is still with us,
although more and more in paperback form, so with a certain
ephemeral quality. The next generation, with all their attachment
to computers, sophisticated software and challenging games, are
still begging, borrowing and buying books. However,
complacency is not the order of the day. We need to be flexible
and responsive to change in the publishing industry, and aware
of technology developments, with the new abilities of
computers, and the ever changing communications systems.

I firmly believe that there is a place in the twenty first century
for indexers and indexing. We may not be working on the
conventional materials that some of us started working on, we
may be using new techniques and different business methods,
but information will always need organising intelligently and
with an intellectual capacity. For the foreseeable future, I firmly
believe that humans have the edge on machines.

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