

This winter, I served as a judge in the Society for Technical Communication (STC) International Technical Publications process.

In the past, I have served ASI (American Society of Indexers) as a Wilson Award for Excellence in Indexing judge and as Chair of the Wilson Award committee. I have also been on the USDA Indexing Faculty since June, 1996, reviewing the indexes of students of both the Basic and Applied Indexing courses.

This year, as a judge for STC, I was pleasantly surprised to see how much attention and focus is paid to indexes in the various categories, though there is no category just for indexes. From what I recall of my experience in the mid-1990s judging for the Washington, DC Chapter, judges were previously instructed to comment if indexes were included in book-length documents, but there was little if any other attention paid to indexes or their contents.

STC Judging Process

Each year STC sponsors local and international competitions in which technical writers – both STC members and non-members – have the opportunity to receive recognition for their work. The competitions include online communication, technical art, and technical publications. In the international competition, there are 18 categories of entry for technical publications, ranging from Promotional Materials to Documentation Sets. For online communication, there are six categories, including Help, Reference Materials, Demonstrations, Technical Marketing, Tutorials and Training, and User Support Tools. Chapter competitions generally follow these categories.

STC international competitions have three levels of awards, in descending order: Distinguished, Excellence, and Merit. All entries are judged on their own merits.

Distinguished entries meet or exceed high standards in all areas and contain no major flaws and few, if any, minor flaws. Excellent entries consistently meet high standards in all or most areas and might contain a single major flaw or a few minor flaws. Entries of Merit consistently meet high standards in most or some areas and might contain major or minor flaws. Entries can also be given no award. Entries which judges deem Distinguished can also be submitted by the judges for Best of Show consideration. Best of Show entries are those that come closest to the ideal for their category. Distinguished entries from STC chapter competitions are also submitted to the international competition.

For an entry to receive any award, it must be “thorough, accurate, useful, appropriate, and well executed.”

Results typically fall in a bell curve, with the largest number of entrants receiving awards of Merit, a smaller number Excellence, and a few Distinguished or no award.

While the STC competitions are designed primarily to recognize outstanding efforts of individuals, added benefits include establishing professional standards for work, providing visibility for the profession, creating leadership and volunteer opportunities,

and providing a forum for sharing ideas and approaches and learning from them.

In my opinion, however, the greatest benefit for participants in the competition process is the feedback entrants receive from the judges. According to the 2005 International Technical Publications Competition (ITPC) Judging Handbook, writers “enter STC competitions not only with the hope of receiving an award, but also with the expectation of receiving a thorough critique and constructive feedback from knowledgeable professionals.”

Judges work anonymously in teams of three or more as they evaluate entries, and they individually complete detailed evaluation forms for each entry. All evaluation forms are returned to the entrants. Judges are instructed to provide “*fair, impartial, and constructive* evaluation” of each entry they judge. “Be objective, impartial and helpful.... Be frank, but tactful.... Look for effectiveness, appropriateness, and professionalism.” With regard to evaluation comments, judges are instructed:

Write as many clear, useful comments as you can for each entry, even if you do not feel it qualifies for an award. Your comments are one of the main benefits to the entrants, who have entered the competition not only for the chance to win an award, but also to receive a meaningful critique of their work.

Try to include at least three compliments and three suggestions for improvement, no matter how good (or bad) you judge the entry to be.

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... The more constructive and specific your critique, the easier it will be for the contributors to acknowledge and incorporate your suggestions.

STC Judging of Indexes

Guidelines for judges on writing comments include:

Instead of: "More entries are needed in the index."

Say: "You could improve your index by adding entries with alternative wordings. For example, on page 3-25, you have a heading Sending a File. Your index has an entry for sending a file, but does not have an entry for file, sending. The entry would benefit users who look up the word file in the index."

Examples of judges' comments include:

People can come to an index with many different words in mind for the same action or concept, so you should try to anticipate what those words might be and include them.

In addition, according to the 2005 ITPC Judging Handbook, a major flaw for any piece of technical communication can include no index or inaccurate page numbers in the index.

The evaluation sheets given to judges of publications are detailed tabular forms with categories for agreement ranging from SD (Strongly Disagree) to SA (Strongly Agree) and N/A (Not Applicable). Items for evaluation are divided into areas of Content and Organization, Copy Editing, Visual Design, and Overall. At the bottom of each area is space for Comments, plus there is an area for General Comments at the end.

The evaluation sheets which judges use for book-size publications include items for indexes. For Books and Technical Reports, judges evaluate whether indexes are "comprehensive, cross-referenced within, accurate, well-edited, with effective use of synonyms." For Documentation Sets, Manuals, Organizational Manuals, and Training Manuals, judges evaluate whether indexes are "comprehensive, cross-referenced within, accurate, well-edited, with effective use of synonyms and considers the reader's viewpoint of how to access information." The index items are included under Copy Editing.

The evaluation sheets which judges use for online communications are similar, and also include areas for indexes. For Reference Materials and User Support Tools, judges evaluate if index entries are well-chosen, if the index uses cross-references and alternate words (synonyms) for topics, and if you can browse the index easily with an incremental search field, alphabet navigation buttons, or other facility.

That is, those whose works merit the inclusion of an index will receive some feedback, though perhaps brief, on their index work as well as on the work overall.

ASI Judging of Indexes

The ASI Indexing Evaluation Checklist, available at www.asindexing.org/site/checklist.shtml, is thorough and includes examples, but is not intended for systematic evaluation of indexes. The introduction states, "Here are some helpful insights for ensuring an excellent index."

Similarly, the criteria for the H. W. Wilson Award for Excellence in Indexing, available at www.asindexing.org/site/awards.shtml, is thorough, but again, is not presented for systematic evaluation of indexes.

In general, ASI provides no feedback for Wilson Award submissions, and there is only one level of award: The #1 exemplar. It is believed that ASI is too small and does not have the resources to accommodate more feedback or systematic evaluation of entries.

To work effectively for systematic and comprehensive evaluation of indexes, I would recommend a tabular display for both evaluation tools.

Peer Reviews

The Peer Reviews process, which I have repeatedly encouraged and supported in *Key Words*, the bulletin of ASI, is an extremely beneficial process especially for beginning indexers. But a peer review is not always a systematic process for feedback, is often from novices, and is generally based solely on the index, not the index and whatever it supplements.

The Pacific Northwest Chapter of ASI (PNW/ASI) provides Peer Review: Discussion Options by Sherry Smith and Phyllis Lynn at their web site, www.pnwasi.org/peerguidelines.html. These discussion guidelines were published in *Key Words*, Vol. 10/No. 3, May/June 2002, along with four other articles on peer reviews, including Martha Osgood's "Considerations for On-Line Peer Reviews." All of them are useful, but again,

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none are presented for systematic evaluation of indexes.

At its 2002 Annual Conference, ASI provided one-on-one peer reviews for conference attendees. Reviewers were provided with a Peer Review Checklist to use in their review (*see also Key Words*, Vol. 10/No.4 July/August 2002, p. 107). The checklist was based on the PNW/ASI peer review procedures and the ASI Index Evaluation Checklist. Categories of review included Main Headings, Cross-references, Subheadings, Organization, Double postings, and Miscellaneous. Reviewers were to indicate G (Good) or NI (Needs Improvement). There was also space provided for Overall Comments.

The Peer Review Checklist was an excellent step forward in providing systematic, written feedback to indexers.

Unfortunately, only a few indexers took advantage of the one-on-one peer reviews, so they have not been offered again at ASI conferences.

At the 2003 and 2004 annual conferences STC provided Index Evaluation Workshop sessions on a similar model, with the ASI Index Evaluation Checklist as a guide for evaluators. Feedback from participants was positive (“Thanks very much, I got excellent, comprehensive feedback.”). The sessions are not being offered at this year’s conference mainly due to lack of availability of somebody to coordinate and match evaluators and index writers.

PROPOSAL

I would like to propose a systematic evaluation of indexes. For STC technical publications, this could be in the form of a nineteenth category of judging.

As a professional freelance indexer, I know from experience how hard it is to get feedback on my work from clients. Generally, what feedback I do get is positive and I have sufficient repeat business to be a successful indexer. The feedback I get, however, is typically not detailed.

Years ago, I stopped entering indexes for submission to the Wilson Award because I knew my indexes had problems, albeit minor. I knew they were not perfect and would likely not be judged as exemplary. (How many times have you looked at your own work and been able to pick it apart or want to tweak it after publication?) In addition, it is often difficult to get portfolio copies of indexes, and with no feedback coming, it is all the more difficult to justify to a client a request for multiple copies

to submit to an award committee.

As a teacher of indexing, I routinely employ rubrics for grading indexes. My students all receive detailed feedback and comments including breakdown by points for items such as Term Selection and Content, and Format, or for Main Entries, Subentries and Sub-Subentries, Locators, and Cross-References.

As a professional freelance indexer, I too would appreciate detailed, constructive feedback and the opportunity to receive recognition for my work. The inclusion of an index category in STC publications judging would provide a forum for such feedback and recognition, and would also work to increase visibility of the indexing profession.

With thanks to Rich Maggiani, Associate Fellow, Vermont Chapter, let me point out what business guru Peter Drucker once said, “The most effective way to manage change successfully is to create it.”

As Maggiani says in his Region #1 Director campaign materials, the current transformation in STC is all about giving us more value as members of STC. We want to provide members “with the services we need to retain and enhance our skills; to keep up and lead the trends in our industry; to increase our worth as employees, as consultant, as contractors; to both our employers, our own businesses, and our clients.”

Here is an opportunity to change how indexes are judged.

On the next two pages is a proposed initial draft for systematic evaluation materials for indexes, following the evaluation model of STC International Technical Publications.

ACKNOWLEDGEMENTS

Many thanks to Deborah Patton, Cheryl Landes, Bill Collins, and Jan Wright for listening and providing feedback. I look forward to continued feedback from my peers.

With your support, we can make this happen.

May Your Indexes Always Inspire,

Pilar

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Proposed STC Indexing Evaluation Form

(SD = Strongly Disagree D = Disagree N/A = Not Applicable SA = Strongly Agree A = Agree)

Content and Organization Criteria	SD	D	A	SA	N/A
Headings are clear, concise, appropriate to the text, and useful for the target audience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Headings cover the important topics, are comprehensive and specific in coverage of material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More than one route to information is provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cross-references are used correctly and accurately, and guide readers to preferred terms as necessary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Topics are double-posted as necessary with effective use of synonyms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acronyms and abbreviations are spelled out or cross-referenced to full terms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subheadings are useful and sufficient to aid in finding information, and there are no long strings of undifferentiated locators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The number of levels of entry matches the complexity of the text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inter-connected or related topics are gathered together	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keywords are used first as much as possible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Index length and the number of indexes is adequate for the complexity of the text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locators are complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments:	_____				

Copy Editing Criteria	SD	D	A	SA	N/A
Correct, consistent spelling, punctuation, grammar, capitalization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consistent formatting and typography	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consistent style	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consistent wording in headings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consistent terminology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Main headings and subheadings are distinguished from each other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cross-references are formatted and placed correctly and consistently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization – whether alphabetical, chronological, or other – is clear, consistent, and accurate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When subheadings continue from right-hand to left-hand pages, complete <i>continued</i> lines are provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locators are accurate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locators for non-text material are annotated consistently and accurately	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Copy Editing Criteria**SD D A SA N/A**

Introductory notes are clear and sufficient

 Comments:

Visual Design Criteria**SD D A SA N/A**

Layout of page elements contributes to readability and usability

Spacing, indentations, and general page design presents a page that is aesthetically pleasing

Index entries are presented in a format, typography, and style that provide maximum ease of scanning and locating individual entries

Typography is used as an effective design element

Typography is easy to read

Headings are visually effective in helping readers find and follow information

Spaces or other dividers are provided between groups

Headers and footers are effective navigational devices

Other navigational devices (if provided) help readers find and follow information

Color (if used) adds to the index's appeal and usability and is unified with the master design

 Comments:

Overall Criteria**SD D A SA N/A**

Fulfills the purpose for the intended audience

All elements well integrated

Informative, credible, and convincing

Evidence of creativity or originality

Projects a professional image

 Comments:

General Comments:
