

# Teaching book indexing: a curriculum

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*A book indexing course curriculum that has evolved during the past 15 years is described. This curriculum has been used in classroom-based and distance-learning courses.*

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I have designed and taught book indexing courses, short workshops, and onsite training sessions for the past 15 years. In this article I describe a curriculum that has proven effective for book indexing courses. However, first I must own up to the fact, cited in this issue of *The Indexer* and elsewhere, that I am indeed the one who claims that 'indexing cannot be taught'. In the early 1990s, when I wrote those words, I should have added that 'indexing cannot be taught, but it can be learned'. What I have attempted to do in the 15 years of teaching what cannot be taught, is to provide an environment where book indexing can be learned and practiced.

## Goals and teaching venue

During the first class meeting I tell my students that I have two goals. The first is to provide them with an opportunity to find out if they like indexing and if they are good at it. My second, more lofty goal is to prepare students to work as professional book indexers. Ultimately those students who are successful will become my colleagues. They will join the ranks of indexers I refer work to and at times work with.

There are two venues where I have taught book indexing that form the basis of my teaching approach: the classroom environment and distance learning. Teaching in a classroom is very different from distance learning. In the classroom the attentive instructor knows immediately when there is a lack of clarity. Students' hands go up, faces are puzzled, or there is the audible 'what?!'. Misinterpretation can be corrected immediately. The exchange between student and teacher and between student and student is of great immediate benefit. In the distance-learning environment much of the richness of classroom interaction is missing. I know that online learning is the Big New Thing in education right now, but distance learning has been around for a very long time in the form of correspondence study programs based on paper submission of assignments delivered through the postal service. While the electronic version of distance learning can help reduce the distance in learning and offer more immediate contact via live chat and email, it is still far removed from classroom teaching (or F2F teaching). Online instruction is frequently advocated by those with little successful classroom experience and often by administrators with no classroom experience.

My experience with distance learning was with the Graduate School of the US Department of Agriculture (USDA) in Washington, DC. I designed and taught USDA's Basic Indexing course. The classroom course that I designed and taught was for the University of California Berkeley Extension.

Both courses were accredited. Taking both courses together, I estimate that approximately 2300 students registered in my classes during the past 15 years. The USDA course consisted of 10 lessons and a supervised final examination. On average, most students devoted at least 70 hours to completing the course. The Berkeley course was held for 10 weeks, with 30 contact hours, and students often spent at least another 30 hours on coursework.

## The curriculum

Students can read about book indexing. They can listen to experienced indexers talk about book indexing. But the only way they can find out if they have the ability to index and enjoy the process is to actually write indexes. This curriculum is designed to prepare students to write indexes that follow common indexing specifications.

Fig. 1 is a course outline for a 10-session classroom course. It is not until halfway through the course that the students prepare their first complete index. While I have worked with shorter course formats, I have found that it is a mistake to compress or skip these initial 'background' sessions. A great deal of information is presented in Sessions 1 to 5. Time is needed for the students to absorb these details and learn to apply them.

Many students come to these courses thinking that indexing cannot be too hard and wonder why the course is so lengthy. They do not know that there is more than one way to alphabetize or that there are many ways to format an index. The 'rules' in indexing must be presented. It takes many lessons to go through the basic rules. Early on, around the third or fourth lesson, students turn in an assignment devoted to arranging a list of index entries in the specified format (Fig. 1, Session 3, prepare 'Card Index'). In my mind, this is a 'no-brainer' exercise. There is no term selection, no text to read, it is simply reformatting an unalphabetized list of entries so that the result looks like an indented-style index. If the students follow the instructions all the assignments should be identical. Are they? Of course not. This is when the filtering of students begins. Those students who ignore instructions about alphabetizing, reference locator format, or cross-reference format and placement receive poor grades on this assignment.

The homework assignment for Session 5 is to write an index. In my mind, this first indexing assignment is the most important exercise in the entire course. I want students prepared to do it. This is why so much attention is devoted to the details of formatting, arrangement, and other aspects of

**Session 1: Introduction**

Course Overview  
 What is an index? How does it differ from a concordance, a catalog, a table of contents?  
 Authors as indexers  
 Qualities of an indexer  
 Can indexing be taught?  
 Publication process and the index  
 What should be indexed?  
 Homework: Reading

**Session 2: Alphabetization, Headings & Subheadings, Cross-references**

Alphabetizing & Arrangement of Entries  
 Word-by-word  
 Letter-by-letter  
 Chronological order  
 Page number order  
 Other orders  
 Headings and Subheadings  
 What are they?  
 Relationship between a heading and subheading  
 Terminology: Variety of terms used  
 Format of  
 Singular vs. plural  
 Inverted  
 Specific or general  
 Indented style  
 Run-on style  
 Levels: how many are enough?  
 Cross-references  
 Purpose of  
 Forms of  
 See  
 See also  
 See under  
 See also under  
 General cross-references  
 Placement of  
 Punctuation: headings, subheadings, cross-references  
 Reference locator formats  
 Homework: Reading, prepare for quiz

**Session 3: Style Guides, Index Specifications, Mechanics of Indexing**

Style Guides & Index Specifications  
 Purpose of a publisher's style guide  
 Components of a style guide  
 Index specifications  
 Mechanics of indexing  
 Card and shoebox method  
 Using indexing software  
 Preparing the index manuscript (on paper or electronically)  
 QUIZ  
 Homework: Prepare 'Card Index'

**Session 4: Editing, Typography, Index Length**

Editing guidelines  
 Typography and layout of an index  
 Italics  
 Bold  
 Annotated reference locators  
 Other  
 Length of an index  
 How to judge  
 How to reduce size of  
 Homework: Reading

**Session 5: Special Problems in Indexing**

Names  
 Personal names  
 Foreign names  
 Corporate names  
 Place names  
 Titles of works  
 Abbreviations & Acronyms  
 Numerals as entries  
 Symbols as entries  
 Homework: Prepare American Express Index; Reading

**Session 6: Special Types of Indexing**

Legal  
 Medical  
 Multi-volume/multi-authored works  
 Newspapers  
 Periodicals  
 Database indexing  
 Translations  
 Online  
 Hypertext/Web indexing  
 Homework: Reading

**Session 7: Indexing Exercise Review & Computers and Indexing**

Review American Express Index  
 Computers & Indexing  
 Automated 'indexing'  
 KWIC/KWOC/KWAC  
 Concordance generation  
 Clustering/Weighting/Relevance Ranking  
 Computer-aided indexing  
 Word processing software  
 Stand-alone indexing software  
 The electronic manuscript  
 Submission formats (RTF)  
 Generic coding

**Session 8: Software Demonstrations**

In-class demonstration of indexing programs for the Windows platform  
 Examination of an RTF file  
 Electronic indexes (HTML, online help, etc.)

**Session 9: The Business of Indexing**

Editor's perspective on index cost  
 Bidding the job  
 Rates  
 Depth of indexing  
 Contracts  
 Markets for freelancers  
 Setting up an indexing business  
 Resources and networking  
 Homework: Prepare Final Index

**Session 10: Wrap-up Session**

The Future of Indexing  
 Meet Some Indexers  
 Your Questions  
 Grading Schedule  
 15% Quiz  
 10% Card Index  
 5% Class Participation  
 30% American Express Index  
 40% Final Index

Texts

*The Chicago manual of style*, 14th edition, Chapter 17  
*Indexing books*, Nancy Mulvany, University of Chicago Press, 1994

Fig. 1. Course syllabus: book indexing

index specifications before the indexing assignment. I want the students to be able to focus on term selection and coherent index structure and not be distracted by formatting issues.

It is essential that the material assigned for indexing be complete, not an excerpt from a larger work. Book index structures are designed with an entire text in mind. While a chapter from a book can be viewed as an 'entire text', this is artificial. In addition to completeness, the assigned text must also be intellectually accessible. In other words, it must be something that does not pose comprehension challenges. The first indexing assignment for my students has been the small, 25-page booklet, *Your guide to American Express® Cardmember services*. This is the booklet that was sent to people who signed up for an American Express charge card in the 1980s.

Hundreds and hundreds of indexes ago I lost count of how many 'AmEx indexes' I have seen. One might think that I could grade and evaluate these indexes in my sleep, but that is not true. Every index is unique. I have seen excellent 4-page indexes and excellent 10-page indexes for this material. This is the assignment to which I devote the most time and attention. It is here that I must identify and encourage those students who 'get it', who are on the right track. Those who make a mess of the index must be corrected and graded appropriately. The most difficult indexes to review are those in the middle – they are the 'B and C' students. In order to offer instructive advice, it is necessary to figure out how they are thinking. Some of these students just need to be turned around a bit, nudged in the right direction because they do 'get it' but are not consistently executing what they understand. Most students will initially fall into this middle category.

The difference between classroom learning and distance learning is never more apparent than in the session when the first indexing assignment is returned to the students. While my distance-learning students received a marked-up index with many comments and a handout about the assignment, this pales in comparison to the classroom discussion of the indexes and the indexing process. It is absolutely impossible in the distance-learning environment to duplicate the dynamic classroom discussion that followed the return of the AmEx indexes. This is extremely unfortunate because the discussion was of most benefit to the students in the middle category ('B and C' students). The students who did very well glowed, those who did very poorly were dismayed. The students receiving Bs and Cs were often feisty. They questioned my opinions about their term selection or structural decisions. This was good. It gave me an opportunity to clarify my opinions and better understand their perspectives.

After the return of the first indexing assignment the rate of student withdrawals accelerates dramatically, particularly among distance-learning students. The remainder of the course is devoted to presenting more 'rules', preparing the students to write an index for more complex material, and providing information about computer software, machine-aided indexing, and running an indexing business. The final indexing assignment has varied in my courses over the years. All texts assigned for indexing have been 50–60-page docu-

ments. Perhaps the most widely used (and detested) document is *An agricultural dilemma: drainage water and toxics disposal in the San Joaquin Valley* (Letey et al., 1986). While this text may not be to everyone's liking, it is typical of the type of material that might be assigned to first- or second-year college students in an environmental studies course.

This last index is given a specific size limit. One of the important decisions students will make is what type of material not to include in this index. There will not be room to include all indexable material. What choices will they make? Will the indexer apply these choices consistently? The answers to these questions are what separate the good from the bad indexes. Most students remaining in the course manage to produce an index that is publishable without too much editing. I am always dismayed by this. The majority of these indexes are not horrible, but they are not very good either. Yes, if necessary, and with some editing, these indexes could be published without too much embarrassment. Unfortunately, this is what we see with so many published indexes today. But, in the end, as a teacher, I am confronted time and time again with that which cannot be taught.

## Textbooks and grading

Because the indexing style of the University of Chicago Press is used by so many American and Canadian publishers, the chapter on indexing in *The Chicago manual of style* is a required text. In addition, many reading assignments are from *Indexing books* (Mulvany, 1994), the other required text. Pat Booth's recently published (2001), *Indexing: the manual of good practice*, would also be an excellent required text.

Recommended and adjunct texts include *Indexing from A to Z* (Wellisch, 1995), *Handbook of indexing techniques: a guide for beginning indexers* (Fetters, 1999) and *Indexing, The art of* (Knight, 1979). The URLs for the websites of the various indexing societies, particularly ASI and AusSI, are provided. In the Berkeley course I often brought in articles about the publishing industry from *The New York Times* or papers from *The Indexer*.

Because the USDA and Berkeley courses were accredited, it was necessary to grade student work. (In the USA, accreditation of a course means that the course content has been evaluated by educators and granted a certain amount of academic credit, which is usually transferable to other accredited, degree-granting universities.) I have come to realize that adult learners (most of my students were between 30 and 70 years old) seem to take grades much more seriously than undergraduate university students. Instructors must be prepared to justify each and every grade!

In both the distance-learning and classroom courses, grading is weighted; actual indexing assignments account for 70% of the final grade. Table 1 shows a sample grade calculation that uses the Grading Schedule at the bottom of Fig. 1.

The weighted grade is obtained by multiplying the weighting by the grade (for the Quiz,  $0.15 \times 90 = 13.5$ ). The final grade is the sum of all weighted grades. This grade distribution is very common. Students with grades like these have done the reading assignments, seem to understand

**Table I.** Weighted grading system: a typical student profile

Weighting (%)	Assignment	Grade	Weighted grade
15	Quiz	90 (A-)	13.5
10	Card index	82 (B-)	8.2
5	Class participation	100 (A+)	5.0
30	American Express index	79 (C+)	23.7
40	Final index	78 (C+)	31.2
<b>Final grade</b>			<b>81.6 (B-)</b>

indexing rules and specifications, and participate in class discussions. However, they do not demonstrate the ability to write an index. Because of the weighting, a final grade of B- is not a good grade. I tell my students in the first class meeting that they must get a final grade of at least B+ (86 or higher) to even consider offering professional indexing services. Additionally, if they do not receive a final grade of 90 (A-) or higher, they very likely need more instruction/practice in writing indexes.

When a student asks me for a recommendation, I look at the grades for the indexing assignments, particularly the American Express index. Would you want the C+ plumber installing new pipes in your house? Or the C+ mechanic working on your car's transmission? Or the C+ surgeon removing your gall bladder? I mention these scenarios because these professions have some type of accreditation/certification/licensing system. For indexers in the USA, the course instructor is often the sole reviewer of an individual's skills. There is nothing to stop mediocre indexers from offering their services to publishers. Unfortunately, far too many publishers do not realize that they are paying for (and publishing) inferior indexes.

## Why so little success?

Over the years, my course records indicate that only 5–10% of the students who complete my courses will demonstrate the ability to index books; they will receive a final grade of 90 (A-) or higher. It pleases me to see many of these students go on to become successful and respected indexers. At times I am disturbed that only 10% of the students seem to have 'learned' the material covered in the course. Recently I found some solace in Steve Lohr's book, *Go To*. This is about a group of gifted programmers. In the introduction Lohr quotes Donald Knuth:

There are a certain percentage of undergraduates – perhaps two percent or so – who have the mental quirks that make them good at computer programming. They are good at it, and it just flows out of them. . . . The two percent are the only ones who are really

going to make these machines do amazing things. I wish it weren't so, but that is the way it has always been. (Quoted in Lohr, 2001: 9)

Mental quirks cannot be taught; as adults you either have them or you don't have them. This is the element that I believe accounts for the lack of stellar students in book indexing courses. Anyone can learn the 'rules' of indexing or at least know where to find them. Anyone can type index entries into an indexing program and set up the format properly. But this is not enough to produce a quality index, much less an amazingly good-quality index.

I must admit that my curriculum design is for the top 5–10% of the students. There is no course that will turn the other 90–95% into good book indexers. Many people taking book indexing classes have no intention of becoming indexers. Some are taking the course to augment their skills as editors or technical writers, still others are in the class out of curiosity. All of these individuals leave the course knowing a great deal more about book indexing than when they started. When the course enables students to discover that they have the unique mental quirks that make them very good at indexing, then the curriculum has done its job. It is a delight to watch them flourish in this very special profession. I am grateful to the USDA Correspondence Study Program and UC Berkeley Extension for supporting my book indexing courses for so many years.

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