Politics and the Art of Indexing: Teamwork in a Legislative Environment

Abstract: In this article Cheryl Caballero, Erica Smith and Rosalind Guldner, members of the Ontario Legislative Assembly indexing team, describe the challenges of indexing legislative text and how they set about meeting them. A version of their article was originally published in The Indexer in June 2015*.
Keywords: indexing; Hansard; Ontario; Canada

INTRODUCTION

Indexing is often thought of as a solitary profession, but indexers at the Legislative Assembly of Ontario work as a team to publish hard copy and electronic indexes of Hansard, the official record of the House and committee debates. Indexing legislative text has always had its own quirks, and a recent shift to electronic indexes, as well as increased demand for quick access from both casual and specialized users, has created additional challenges. Accordingly, Ontario's Hansard indexers have developed a set of practices to manage this large and constantly evolving body of information.

INDEXING HANSARD

What is Hansard?

Hansard provides a written account and historical record of the debates, decisions and policies of the government of the day. Ontario Hansard is "substantially verbatim." The final transcript is edited to remove repetition and correct errors, but corrections are kept as light as possible to retain the mood and character of what was said by each member of provincial parliament (MPP). As stated by McClung: "The mission of reporting services in all legislatures is to provide access to information on legislative proceedings" and "Publishing the transcripts and indexes of political debates…contributes to parliamentary democracy (McClung 2010, p. 110)." In recent years, Hansard has derived increased importance as the result of a Supreme Court of Canada decision in the case of *Rizzo & Rizzo Shoes Ltd.* (Re) in which the court decided that the Official Debates of the Legislature can be an important tool for determining legislative intent in legal proceedings in cases where the design, intent or purpose of a particular law is at issue.[1]

A Challenge to Index

The challenges of indexing legislative text have been discussed in the past by other indexers and some common themes have emerged. Bilodeau (2008) and McClung (2009) note that the source text is an ever-growing collection of documents with no distinct beginning, middle or end. There are numerous speakers (MPPs) who have different speaking styles and levels of knowledge about the issues before them, as well as different objectives. McClung refers to them as "multiple authors (McClung 2009, p. 67)" and encountering such a diverse range of speakers in one work is particular to indexing parliamentary debates. At its core, the work of the legislative indexer is to identify and group similar ideas and subject matter which have been expressed by an assortment of voices.

Partisan and policy-heavy government language is a challenge to readers and indexers alike, and as Grist states: "Differences in political philosophies can sometimes lead to head scratching when trying to choose a suitable topic (Grist 2003, p. 129)." On occasion, each political party may express their thoughts on the same issue in a variety of ways – one party might suggest a shortage, while the other sees a surplus – and it is the indexer's job to find a neutral term to encompass that subject. Furthermore, over the life of a single legislative session, new subjects emerge and existing subjects evolve: for example, what may have started out as a superficial exchange between two members in question period might be the genesis for a new piece of legislation, or even a provincial inquiry.

Intensifying the challenge to find common and neutral subject headings is the increasingly partisan tone of debate; this can perhaps be attributed to the introduction of cameras into the Ontario legislature in 1986. Televising of House proceedings made the political process more accessible to the general public. However, some observers believe it caused MPPs to be "…overly risk-averse;

that, with every moment captured and scrutinized, Members can no longer be themselves, and parliament may be the worse for it;" Akriotis concludes that the introduction of cameras resulted in a quantifiable decline in decorum and an increase in partisanship (Akriotis 2012, p. 11). These tendencies may be further exacerbated by the use of social media: in a world where every policy statement or political barb is just a tweet away, legislative debates are now just one of an increasing number of ways in which MPPs communicate with constituents and stakeholders.

Meeting User Demand

A diverse range of people read and use Hansard. Key user groups such as MPPs and political staff consult recent debates in order to prepare upcoming speeches, policy and legislation. Other Hansard users include government employees, stakeholders, media professionals and interested members of the public. In this environment, there is a high demand for quick, electronic subject and speaker access to the debates. To this end the branch employs a team of four: a supervisor, two full-time indexers, and an indexing assistant. One indexer is responsible for the House and the other for legislative committees. The indexing assistant performs many of the web posting functions. The online indexes which are updated daily, and final, stand-alone, paper versions are published at the end of each parliamentary session and sent to depository libraries across the country.

In addition to the index, Ontario House Hansard documents are accessible through a search engine. However, a search tool does not provide the context or careful consideration that a good index does and this is especially important given the complex and partisan nature of legislative information. Subject and speaker indexes are indispensable tools, and indexing as a team is essential to meeting demand. Team indexing does pose its own challenges, but by employing the necessary tools and techniques explained in the following sections, Hansard indexers are able to maintain quality and consistency.

TEAM INDEXING IN PRACTICE
Subject Authority List

An essential component of the team indexing process is the subject authority list (SAL); this is the controlled vocabulary tool used at Ontario Hansard. Controlled vocabularies are useful in reducing the ambiguities that are inherent in language, where there are many different ways of saying the same thing (McClung 2009, p. 65). With multiple indexers and multiple authors (MPPs), it is important to define consistent terms. For example, MPPs interchangeably refer to medical doctors as both "doctors" and "physicians," but for the purposes of the index, the subject authority directs indexers to use

"doctors" as the preferred main heading. By creating this guide to ensure uniformity by indexers, we also increase the usability of the index for researchers.

The current subject authority spans over 10,000 records and has been in use since 1994. Though extensive, it is in no way a comprehensive guide to all topic headings used in the Hansard indexes. Our working process is designed to keep the subject authority list, which is contained in a Cindex file, open at all times beside our working indexes. This way we can search for terms as needed using a shortcut to access the find function.

The list is a living entity that is modified, edited and maintained on a regular basis to sustain its usefulness for current Hansard indexing. Due to its longevity, it is not as susceptible to rapid change as the working indexes. Hot political topics can emerge and disappear rapidly, so not all headings that are used in the working indexes are added to the subject authority list. Using the same method outlined by McClung, changes to terms are not made without considerable research and consultation (McClung 2009, p. 68). Therefore, only those topics which persist over a whole legislative session will merit inclusion in the subject authority which is edited by the supervisor and indexers at each session's end. However, throughout a legislative session, communication and collaboration are important – indexers often informally meet to discuss how to approach new issues and topics and decide upon new subject headings together.

Indexing Techniques

There are a few best practices employed in team indexing that help streamline the work process and enable Ontario's Hansard indexers to function more efficiently as a group. Just as the SAL defines consistent terms, the techniques below define a consistent structure for working indexes. This not only helps indexers in their day-to-day work but makes the editing process less burdensome.

Rather than double-posting entries, cross references are used. Each House or committees index is compiled over an entire session of Parliament which lasts an average of two years (although this timeframe is variable and unpredictable). Over this length of time, double-posts are impossible to keep track of and could add potentially unnecessary entries to the index. Cross references can easily be turned into double-posts at the final editing stage.

Adding a subheading to every new entry is also crucial. A topic may engender discussion of a general nature at first but then become more complex over time. It is best to add at least one subheading to every entry and consolidate unnecessary subheadings during the final edit.

Indexes for multi-volume works are usually rather long and are edited on an ongoing basis. When the House adjourns, indexers first work to clear the backlog

and if time permits, a first round of editing is completed. This bit of "clean up" helps to more firmly establish the structure of the index and will make the final edit less onerous. There is one person designated as the primary editor for each index and they are in charge of the bulk of the editing process. Before the documents reach the supervisor for a final edit prior to publication, there should be no major discrepancies with respect to terminology. It takes several weeks to proof and edit the final indexes, upload them to the web and have them printed in hard copy. The most recent House index, published in the fall of 2014, contained 25,391 Cindex records and was 243 pages long.

CONCLUSION

A collaborative approach to indexing can be very useful in certain environments. Given the popularity and pervasiveness of digital media, and an increasing demand for rapid classification of web content, it is possible that team indexing practices will become much more common in the future.

At the Legislative Assembly of Ontario, Hansard indexers have been working as a team for over two decades to create access to the debates of the House and committees. Because they are directly involved with legislative information retrieval, they have developed valuable insight into the information needs of their users, which has informed indexing practices over the years.

A significant component of the job is the ability to accommodate the changing needs of users; as such it is important for team members to be open to new approaches in information access and to new technologies. Hansard indexers must meet any imminent change with this ever-present thought in mind. No matter how technology changes, the cornerstone of their work is the same as ever: creating headings that are accurate, descriptive, neutral and accessible to all users.

This article has focused on team practices in indexing but at Ontario Hansard, another essential component of the role is providing research services. Hansard indexers provide support to editorial staff by fact-checking queried items in the draft transcript of debates. They also create and maintain a branch staff net which houses internal and external curated resources that are essential to the work of Hansard editors. For external users, which can include everyone from high school students to lawyers, the team provides research assistance and instruction on accessing legislative materials. This direct and ongoing interaction with index users is valuable; it greatly informs indexing practices and term selection and provides beneficial insight into how user groups seek and interact with legislative information.

Since its inception, Hansard has played a key role in society by providing citizens with access to the democratic process, and political reasoning for policies that affect their everyday lives. Legislative indexers adapt and make use of new practices and technologies in their effort to create a neutral and non-partisan window into these important conversations.

Footnote

[1] Rizzo & Rizzo Shoes Ltd. (Re), [1998] 1 S.C.R. 27 Retrieved from Supreme Court of Canada website: http://scc-csc.lexum.com/scc-csc/scc-csc/en/item/1581/index.do.

For a detailed discussion of the case, see Geoff. R. Hall's article "Statutory interpretation in the Supreme Court of Canada: the triumph of a common law methodology (1998)."

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Biographies

Cheryl Caballero holds a Master of Library and Information Studies degree from Dalhousie University. She has been an Index and Reference Officer at Hansard since 2011.

Erica Smith completed her Masters of Information at the iSchool in Toronto in May 2011. Shortly after, she began her role as an Index and Reference Officer at Hansard.

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No-Cost and Low-Cost Ways to Monitor U.S. Legal Information

Abstract: Keeping up-to-date with available resources in the legal information field is often a daunting task; patrons in all sectors continue to demand the most accurate and cost-effective information. Beyond the ever-increasing number of resources that librarians must keep track of in their own jurisdiction, there are an equal number of developments in other jurisdictions which add additional challenges. These new resources, in addition to the unique quirks encountered when researching the law in a different jurisdiction, can make for a challenging task, as Alison Shea explains.

Keywords: legal research; United States

A 2011 article for this publication[1] attempted to address some of the resources and quirks encountered in U.S. legal research. This new article is not necessarily a direct update to the previous article, but will instead provide a brief overview of the leading official, free resources to help monitor cases currently in litigation, as well as proposed legislation and regulations. The jurisdictional focus is primarily U.S. federal, but tips on monitoring state cases and legislation are also provided. Most of the sources mentioned in this article are not entirely "new" and are introduced in the specific context of how to use them to monitor developments. Keeping with the spirit of the 2011 article, the resources discussed herein will be no-cost or low-cost only; this article will not address the more powerful fee-based tracking services offered from a number of vendors. A short section on recent additions to the no-cost and low-cost legal database landscape is included at the end.

MONITORING CASES

Keeping track of a case moving through the court system and acquiring documents filed in support of these cases can be an important source of research for legal practitioners and scholars across all sectors. Many librarians are already aware that federal court system's Public Access to Court Electronic Records, or PACER, is the place to find documents filed in support of federal litigation.

PACER[2]

- *What is it?* PACER is an electronic public access service that allows users to obtain case and docket information online from federal appellate, district, and bankruptcy courts. Be aware that the coverage dates for each court vary widely from court to court, so it is worth checking out the individual court's information page to determine whether the case sought will be included.[3]

- *Why use it?* Originally designed as a way for attorneys and courts to easily file and manage court documents electronically, PACER also provides the general public with a way to monitor case filings and access related court documents.

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