

DOCUMENT RESUME

ED 047 710

LI 002 570

TITLE A Basic Index for Minutes.
INSTITUTION New York State Education Dept., Albany.
PUB DATE 59
NOTE 49p.
EDRS PRICE MF-\$0.65 HC-\$3.29
DESCRIPTORS Classification, *Diaries, Guidelines, *Indexes (Locaters), *Indexing, Manuals, *Records (Forms), *Subject Index Terms

ABSTRACT

The basic index for minutes presented in this manual was developed to aid clerks in indexing their minute books. A minute book is an extremely important record, but reference to an unindexed or poorly indexed minute book can be a time-consuming problem. The manual outlines the procedure to be followed in setting up an index and maintaining it on a current basis, thus eliminating much of the trouble that is encountered in attempting to index a completed minute book. While the manual was originally intended as a guide for indexing the minutes of cities, towns and villages, the procedure can be readily adapted to the minute books of districts, boards and commissions. This manual presents a classification of subjects under which minute books can be indexed. It also contains instructions for setting up the index in card form, for selecting index card entries, for utilizing the index in card form or converting it to page form and for transforming a current index into a cumulative index.
(Author/SG)

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A BASIC INDEX FOR MINUTES

First Printing 1959
First Reprinting 1960
Second Reprinting 1967
Third Reprinting 1970

THE UNIVERSITY OF THE STATE OF NEW YORK
The State Education Department
Office of State History
Albany, New York 12224

EDO 47710

LI 002 570

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PREFACE

The basic index for minutes presented in this manual was developed to aid clerks in indexing their minute books.

A minute book is an extremely important record, but reference to an unindexed or poorly indexed minute book can be a time-consuming problem. Fully aware of this problem, many clerks have sought assistance in indexing their minute books. The manual was prepared to guide and help them.

The manual outlines the procedure to be followed in setting up an index and maintaining it on a current basis, thus eliminating much of the trouble that is encountered in attempting to index a completed minute book. While the manual was originally intended as a guide for indexing the minutes of cities, towns and villages, the procedure can be readily adapted to the minute books of districts, boards and commissions.

The development of the basic index for minutes was largely the work of G. Donald Sager, previously with this office, but many contributed advice and assistance. While it is impossible to acknowledge all of them, officials of the towns of Greece, Webster, Henrietta and the city of White Plains were most helpful; Dorothy K. Gordon, Librarian of Shaw-Walker Co., New York City, gave generously of her professional experience in the review of the manual; the Association of Towns of the State of New York and especially the late Edward F. N. Uthe, Executive Secretary, and Zelda Uthe, Director of the Association were of great assistance.

Louis L. Tucker
Assistant Commissioner for State History

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DEFINITIONS

For the purpose of this manual the following definitions apply. Several of the definitions are taken from "Indexing: Principles, Rules and Examples," published January 1957 as Bulletin Number 45 by The University of the State of New York.

Action -- Any matter of business or other occurrence recorded in the minutes.

Cross-reference -- A cross-reference refers the searcher or user of the index from a possible heading under which no entries or page references are given to the chosen heading where they may be found.

Entry -- The word, phrase or combination of phrases expressing the subject or idea together with the page reference indicating where it may be found in the text of the minutes.

Heading -- The word or words chosen to express the subject or idea. In this index the heading is placed at the top of the index card and thus determines its alphabetic position in the index.

Index -- An alphabetical arrangement of subjects indicating the volumes and pages where various aspects of a subject are treated. An index may be in the form of a list or card file.

Subject -- Any event, place, person, fact, relation, topic, idea or whatever is an object of thought and may become an object of search.

INTRODUCTION

The purpose of any index is to facilitate reference to the contents of recorded information. It is, in short, a system that classifies the recorded information under headings commonly familiar to readers. To fulfill its primary purpose as a reference tool, it must classify the recorded information under as many headings as possible.

While it is not possible to determine in advance all the index headings that will be needed in the future to index minutes, it has been possible, by examining the minutes of sample towns and villages, to establish a list of common subject headings exclusive of proper names.*

This manual presents a classification of subjects under which minute books can be indexed. It also contains instructions for setting up the index in card form, for selecting index card entries, for utilizing the index in card form or converting it to page form and for transforming a current index into a cumulative index.

This basic index was developed in cooperation with the Towns of Greece and Henrietta and has been checked against the minutes of other units of local government.

Although this index was originally developed for town minutes, the list of common subject headings beginning on page 9 may easily be adapted to the minutes of other governmental units such as cities, villages, boards and special districts.

* A proper name is the name of a person (John Smith), a group of persons (American Legion), a firm (Johnson Manufacturing Company), a place (Broad Street), or thing (War Memorial Stadium). A proper name is always capitalized.

THE IMPORTANCE OF INDEXING

To date only a small number of clerks have indexed their minute books. Of those who have not, some probably feel that they lack the technical knowledge of indexing necessary to do the job. But it is more than likely that the majority have been scared away from indexing their minute books by the volume of information contained in each book and the amount of time that would be required to do the job.

Yet hardly a clerk will deny that an index for his minute books is badly needed. The increasing complexity of the minutes of each board or council meeting, reflecting as they do the growing responsibilities of local government, requires adequately indexed minute books to maintain control of information and to save office personnel time.

The method of indexing minute books outlined in this manual is designed to furnish clerks with the technical knowledge and a list of common subject headings needed to index their minute books on a current basis. By following this method and by indexing the minutes as they are prepared a clerk can maintain an accurate and current index and escape the time-consuming job required to index a minute book after it has been completed. The reason for this is simple. It is easier and quicker to index the minutes after each meeting than to index an entire volume at one time.

The only prerequisite to indexing a minute book is that the pages be numbered. In cases where the minute book pages are not numbered, the clerk can easily insert the page numbers in consecutive order either by hand or with a numbering machine. Several examples of numbering systems are shown in Appendix B, pages 43 and 44.

PROCEDURE FOR INDEXING ON CARDS

These are the steps required to make a card index of the contents of a minute book:

1. Carefully read each action in the minutes to determine the heading or headings under which it is to be indexed. If the action contains one or more subjects that are not proper names, refer to the list of common subject headings on pages 9 to 13. If a proper name is one of the subjects under which the action is to be indexed, refer to the several chapters in this manual that explain how to index proper names.
2. Prepare a set of first position guide cards, as explained on page 15, to designate the alphabet. Insert the guide cards in a card drawer of suitable size. (Note: After the index "grows" a bit it will probably be desirable to prepare and insert third position guides, as explained on page 6, to designate major subjects.)
3. For each subject determined in step 1 prepare an index card with the heading and entries as explained in the section titled "Preparing Guide Cards and Index Cards," page 15.

MATERIALS REQUIRED TO SET UP THE BASIC INDEX

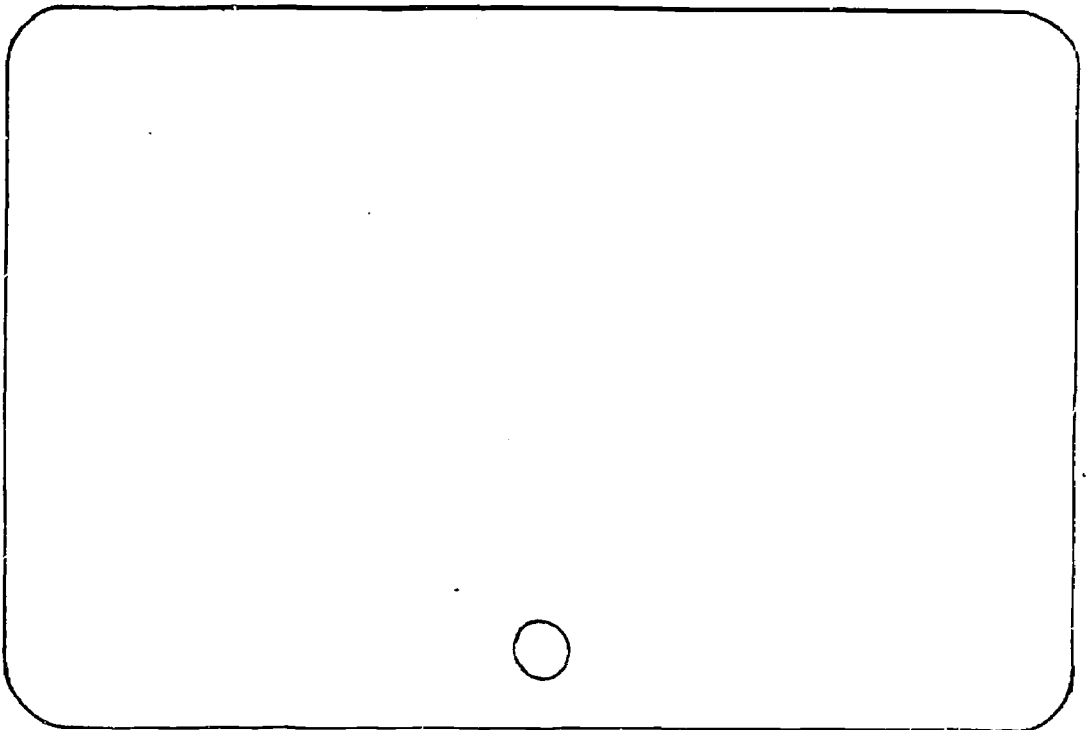
Ease of preparation and reference is important if an index is to be a useful working tool. Four types of materials -- index cards, guide cards, end guides and a card file drawer -- are required.

Index Cards

Index cards are used for recording information in the basic index because it is believed they are easier to prepare and to use than an index in book form. Although a book form of index may be more compact, cards have the advantage of permitting the maintenance of the alphabetic arrangement of an index regardless of the number or variety of subjects indexed. At the same time, cards not only permit indexing on a current basis but can also be saved and interfiled to form a cumulative index covering a long period of time.

A 4" x 6" white unruled card is satisfactory. While cards of larger size may be used, cards smaller than 4" x 6" are often difficult to write or type on and may not provide sufficient space for making entries. To avoid loss of cards, the index cards may be punched so that they can be held in place in the file by a drawer rod. Cards with rounded corners will outlast square cornered cards since they will not become bent or dog-eared, and, in general, will be easier to use. Cards with rounded corners are used in the illustrations in this manual. However, if these cards are not readily available from your supplier, cards with square corners will work satisfactorily.

A 4" x 6" card with rounded corners and punched for a drawer rod is illustrated below. Each subject -- whether it is one included in the common subject headings listed on pages 9 to 13, or a proper name as defined in the footnote on page 1, a department, a district, or other governmental unit -- will require at least one card of this type. Refer to page 15 for instructions on preparing index cards.

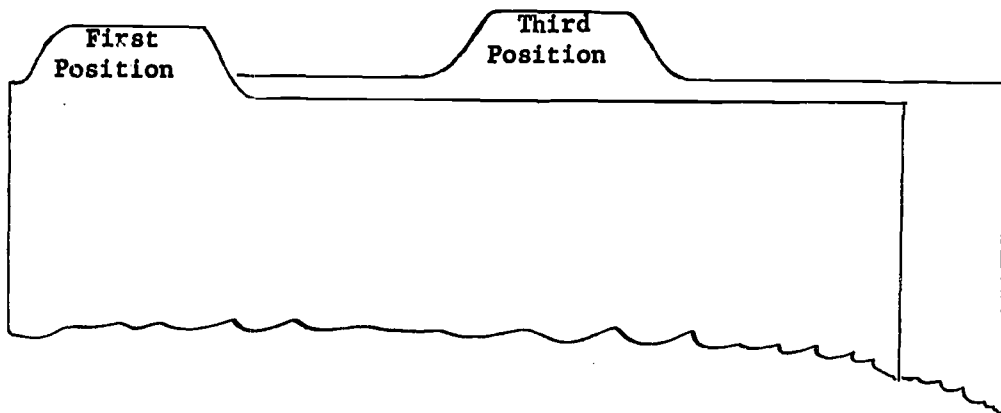


NOTE: To conserve space, all other drawings of cards in this manual are reduced in size to 3" x 5."

Guide Cards

Guide cards are necessary to break down the index into readily discernible units. The ordinary "ABC" set of guide cards is generally unsuitable for indexing purposes as the tabs are scattered across the face of the card in five positions thereby making reference to the index cards difficult. For the index described in this manual, blank guide cards with fifth cut tabs in the first and third positions are recommended. They should be of good quality card stock and punched to accommodate a drawer rod if one is used. A special order to a supplier is generally required to obtain guide cards of this type with tabs in only the first and third positions. However, blank guide cards with fifth cut tabs are commonly available at stationery suppliers in packets of one hundred containing twenty guides in each of the five tab positions. Blank guide cards of this type are quite inexpensive when sold in packs of one hundred. The fifth position guide cards in these sets may be reversed and used as additional first position guide cards. The second and fourth position guide cards in the sets should be discarded.

The position of the guide cards as they appear in the filing drawer is illustrated below.



The first position guides are used to break down the alphabet, A, B, C, and so on. It is generally satisfactory to combine the following letters on one guide each: J-K, P-Q, U-V, and XYZ. Thus 21 first position guide cards are needed.

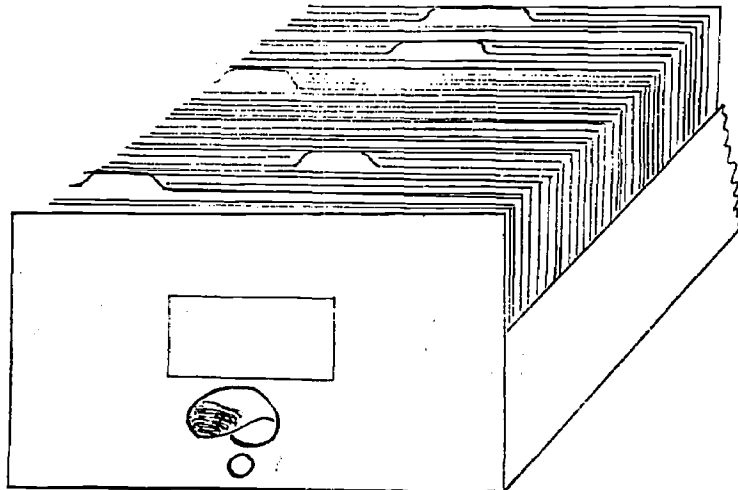
Third position guides are used to indicate major subjects such as BONDS and NOTES, CURBING, DRAINAGE, ELECTIONS, ORDINANCES, REPORTS, SEWERS, SIDEWALKS, STREETS, WATER and ZONING. Local reference requirements will dictate the number of third position guide cards needed. However, it is recommended that not more than 15 third position guides per 1,000 index cards be used, as a greater number of guides will interfere with easy access to the cards for filing and searching. It is important to insert only a sufficient number of guide cards to speed reference to the index. Do not insert so many guides that "the forest can't be seen for the trees."

End Guides

End guides are similar to the guide cards described above but are usually of a distinctive color from these guide cards and are without tabs. They can be purchased from most stationery suppliers. End guides should project approximately 1/8 inch above the index cards. Thus if 4" x 6" index cards are used, the dimensions of the end guides should be 4 1/8" x 6".

End guides are used to indicate the end of a series of index cards designated by a third position guide card. For example, if a third position guide has been used to designate the subject CURBING, an end guide should be inserted immediately following the last index card related to this subject to point out to the user of the index that all of the cards between the third position guide and the end guide pertain only to the subject CURBING.

The completed index file drawer with guides and cards in place should look like this:



HOW TO DETERMINE AND INDEX THE SUBJECTS OF A MINUTE BOOK

To index a minute book it is necessary to determine the subject or subjects appropriate to each of the actions recorded in the minutes. A subject is any person, place, fact, topic, event or idea that is likely to be the object of search when consulting an index. From this definition it follows that the indexer must use judgment in determining to what extent an action recorded in the minutes would be searched for under its various subject headings. The criterion of a good index is that reference to an action recorded in the minutes may be found not only by the person who did the indexing but also by others who may search for the entry under a related subject. When the subject is not a proper name, the indexer should refer to the list of common subject headings beginning on page 9, since it is important that a set pattern of subject headings be followed.

For example, a typical action is recorded in the minutes as follows:

The clerk read a communication from Mr. Charles A. Jones, 18 Tudor Lane, and dated January 16, in which he states that since Tudor Lane has become an access road to the new Park View Development, the street has quickly deteriorated and is in need of surfacing.

The subjects of the above action are analyzed below:

1. One of the subjects is the need for surfacing a street. The indexer should refer to the list of common subject headings beginning on page 9 to determine the proper standard heading for this subject which, it will be noted, is STREET SURFACING.
2. Proper names comprise two other subjects which should be included to make the index complete. These are: Charles A. Jones, the letter writer; and, Tudor Lane, the street in need of surfacing. Referring to Appendix A which gives rules for alphabetizing proper names, the indexer will find that Mr. Jones is alphabetized as JONES, CHARLES A. and the street in its regular order -- TUDOR LANE.
3. A fourth subject also appears -- PARK VIEW DEVELOPMENT. This is a case where the indexer must exercise judgment to decide whether the index might someday be searched for the action under this subject.

In the above example index cards will be prepared for each subject -- STREET SURFACING; JONES, CHARLES A.; TUDOR LANE and, if it is so determined, PARK VIEW DEVELOPMENT. Instructions for preparing index cards begin on page 15. Properly prepared index cards for these subjects are shown on the next page.

NOTE: These examples assume that the action was recorded in volume 23, page 36 of the minutes.

19-- STREET SURFACING

request for, Tudor Lane

23:36

19-- JONES, CHARLES A.

re: surfacing, Tudor Lane

23:36

19-- TUDOR LANE

surfacing, request for

23:36

19-- PARK VIEW DEVELOPMENT

Tudor Lane, request for surfacing

23:36

A LIST OF COMMON SUBJECT HEADINGS

This list of subjects, other than proper names, is intended only as a guide for indexing minutes. It represents a compilation of subjects contained in the minutes of typical units of local government. An indexer may not have to use all of the headings listed, but he will probably find it necessary to add headings in order to index actions whose subjects are not included in this list. In this event, he should follow the rules for alphabetizing given in Appendix A, page 42, and integrate the additional headings into the index.

A	C
ACCIDENTS (index also under INJURIES if appropriate)	CASH FUND
APPOINTMENTS	CHECKS
APPROPRIATION OF BALANCES	CITY CLERK
ASSESSMENT	CITY DUMP
ASSESSORS	CITY HALL
AUDITS	CITY PROPERTY (other than those specific proper- ties listed herein)
	CIVIL DEFENSE
B	CIVIL SERVICE
(X) BILLBOARDS (see SIGNS AND BILLBOARDS)	CLAIMS
BOARD OF HEALTH	CLERICAL PERSONNEL
BOARD OF REVIEW	COMMISSIONER OF PUBLIC WORKS
BONDS AND NOTES (see example, page 21)	COMMON COUNCIL
BONDS, SURETY	COMPENSATION
BUDGET	(X) COMPLAINTS* (see subject of complaint)
BUILDING INSPECTOR	CONSTABLE
BUILDING PERMITS	(X) CONTRACTS* (see subject of contract)
BUSES	

*see page 13

C (Continued)

CORPORATION COUNSEL

COUNTY ROAD WORK

CURBING

(see example, page 31)

D

DESIGNATION OF DEPOSITORY

DEVELOPMENTS (General)

DEVELOPMENTS (By Name)
(see example, page 36)

DOG ENUMERATORS

DOGS

DRAINAGE

DRAINAGE DISTRICT(S) or
DEPARTMENT(S)
(see example, pages 24 and 29)

E

EASEMENTS

ELECTIONS

EQUIPMENT RENTAL

F

FINANCIAL STATEMENTS

FIRE

FIRE DEPARTMENT(S)
(see example, page 24)

FIRE DEPARTMENT(S) PERSONNEL

F (Continued)

FIRE DEPARTMENT(S) PURCHASES

FIRE DISTRICT(S)
(see example, page 29)

FIRE WARDENS

FIREARMS

FIREWORKS

G

GARBAGE

H

HEALTH NURSE

HEALTH OFFICER

(X) HEARINGS*
(see subject of hearing)

HIGHWAY DEPARTMENT PERSONNEL

HIGHWAY DEPARTMENT PURCHASES

HIGHWAY IMPROVEMENT PLAN

HIGHWAY OPENING PERMITS
("Highway" headings should be
indexed under STREET DEPARTMENT
or DEPARTMENT OF PUBLIC WORKS
if more appropriate)

HOLIDAYS

HOT DOG STANDS

HYDRANT DISTRICT(S) OR DEPARTMENT(S)
(see example, pages 24 and 29)

HYDRANTS

I

INCINERATOR

INJURIES
(index also under ACCIDENTS
if appropriate)

INSPECTORS

INSURANCE

J

JANITORS

K

KENNELS

L

LABORERS

LEAVES OF ABSENCE

LETTERS OF CREDIT

(X) LICENSES AND PERMITS*
(see subject of license or
permit)

LIGHTING DISTRICT(S) or
DEPARTMENT(S)
(see example, pages 24 and 29)

LUMBER

M

MAIL

MAYOR

(X) MEMORIAL DAY
(see HOLIDAYS)

J

(X) NOTES
(see BONDS AND NOTES)

O

ORDINANCES
(see example, page 28)

P

PENSION PAYMENTS

PERFORMANCE BONDS

PLANNING BOARD or COMMISSION

PLUMBERS

PLUMBING PERMITS

POLICE DEPARTMENT PERSONNEL

POLICE DEPARTMENT PURCHASES

PUBLIC WORKS OFFICER

(X) PURCHASES*
(see subject of purchase)

Q

(X) QUOTATIONS*
(see subject of quotation)

R

RECEIVER OF TAXES

RECREATION

REFRESHMENT STANDS

REPORTS
(see example, page 28)

*see page 13

R (Continued)

(X) RESIGNATIONS
(see SEPARATIONS)

RETURNS (of money)

S

SCHOOLS

SCRAP METAL

SEPARATIONS

SEWAGE DISPOSAL

SEWER DEPARTMENT PERSONNEL

SEWER DEPARTMENT PURCHASES

SEWER DISTRICT(S) or
DEPARTMENT(S)
(see example, pages 24 and 29)

SIDEWALKS
(see example, page 31)

SIGNS AND BILLBOARDS

SNOW AND ICE REMOVAL

(X) SPEED, SPEEDING AND SPEED
RESTRICTIONS
(see TRAFFIC CONTROL)

(X) STOP SIGNS
(see TRAFFIC CONTROL)

STREET CLOSINGS

STREET DEDICATIONS

STREET LIGHTS

STREET NAME CHANGES

STREET SURFACING
(see example, page 31)

SUBDIVISION DEPOSITS

S (Continued)

SUPERVISOR

(X) SURETY BONDS
(see BONDS, SURETY)

T

TAX ROLLS

TAXATION

TELEPHONE

TELEPHONE OPERATOR

TIME

TOWN ATTORNEY

TOWN BOARD

TOWN CLERK

TOWN DUMP

TOWN HALL

TOWN PROPERTY
(other than those specific proper-
ties listed herein)

(X) TRAFFIC
(see ORDINANCES, TRAFFIC)

TRAFFIC CONTROL

TRAFFIC SURVEY

TRAILERS

TRANSFERS OF FUNDS

TRASH

TRASH RECEPTACLES

TRAVEL ALLOWANCES

TREATMENT PLANT PERSONNEL

TREE SPRAYING

<p>U</p> <p>V</p> <p>VACATIONS</p> <p>VETERANS</p> <p>VILLAGE ATTORNEY</p> <p>VILLAGE BOARD (or, BOARD OF TRUSTEES if more appropriate)</p> <p>VILLAGE CLERK</p> <p>VILLAGE DUMP</p> <p>VILLAGE HALL</p> <p>VILLAGE PROPERTY (other than those specific properties listed herein)</p> <p>VOTING MACHINES</p>	<p>W</p> <p>(X) WARDS, WARD SYSTEM (see ELECTIONS)</p> <p>WATER</p> <p>WATER DEPARTMENT PERSONNEL</p> <p>WATER DEPARTMENT PURCHASES</p> <p>WATER DISTRICT(S) or DEPARTMENT(S) (see example, pages 24 and 29)</p> <p>WATER STORAGE TANK</p> <p>WATER SUPPLY</p> <p>WATER SUPPLY DISTRICT(S) (see example, page 29)</p> <p>WELFARE DEPARTMENT</p> <p>WELFARE OFFICER</p> <p>WORKMEN'S COMPENSATION (index also under INSURANCE if appropriate)</p> <p>XYZ</p> <p>ZONING</p>
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* Complaints, Contracts, Hearings, Licenses and Permits, Purchases and Quotations are indexed under their respective subjects. For example, a hearing relative to an improvement district is indexed under the proper name of the improvement district -- not under hearings. A license or permit issued for fireworks is indexed under fireworks -- not under licenses and permits.

SELECTING INDEX CARD ENTRIES

Index card entries should be brief and accurate. Each entry must be complete enough to describe the action recorded in the minutes. However, do not attempt to include so much information in the entry that the user of the index feels it unnecessary to refer to the actual minutes. Keep in mind that the purpose of an index is merely to assist in finding information -- to point out where certain information may be found; it is by no means a substitute for the minutes.

In selecting entries, strive for key words that succinctly describe or convey the meaning of the text. Avoid vague, general terms that can't stand alone. For example, an entry such as "certain highway equipment" under the heading "HIGHWAY DEPARTMENT PURCHASES" is absolutely meaningless. The indexer must define what is meant by "certain highway equipment" and, in addition, describe the action that has taken place. If the action in this case was a resolution requesting proposals to be submitted on a street sweeper, the entry "certain highway equipment" is obviously too general. On the other hand, an entry such as "sweeper, proposals requested" is both reasonably brief and absolutely accurate.

Although the choice of words used in each entry will, of course, depend entirely upon the text of the minutes, certain key words will undoubtedly be used rather frequently. Among these key words are: hearing, estimates, contract, improvement (or a specific improvement, such as: curbing, surfacing, sidewalks, grading, etc.), proposals and bids. Note, however, that none of these key words are sufficiently descriptive to be used as an entry without modification. It is necessary for the indexer to construct each entry in such a way that the action taken on the subject of the entry is described. For example:

A "hearing" is ordered, held, adjourned, postponed.

"Estimates," "bids," or "proposals" are requested, invited, called for, received, rejected.

A "contract" is awarded, refused, assigned.

An "improvement" generally requires some type of causative action such as a petition for, or approval of preliminary plans. This is often followed by hearing ordered, hearing held. Then, if the work is not done by a municipal department, bids are requested, received, and a contract is awarded. In certain cases the minutes may indicate that the improvement is accepted upon completion of the contract. The indexer must note this fact with a suitable entry, such as final acceptance.

Often it will be necessary to invert or to rearrange the words of an entry from their conventional order so as to place the key word or words at the beginning of the entry. For example:

preliminary budget, hearing ordered
NOT
hearing ordered on preliminary budget

CITING VOLUME AND PAGE REFERENCES

In order to index information recorded in book form it is necessary to refer at least to the page number of the text. When the action is on more than one page, cite the first and final page numbers, for example: 10-12, or 243-46.

Since minutes are of a continuing nature, it is inevitable that eventually the index will cover more than one volume. When the index covers more than one volume, separate volume and page number cited after each entry by a colon, for example, 2:140 (volume 2, page 140). This is the method used in the illustrations shown in this manual. Examples showing the adaptation of the basic index to other methods of volume and page identification appear in Appendix B, pages 43 and 44.

PREPARING GUIDE CARDS AND INDEX CARDS

Preparing Guide Cards

Guide cards are simple to prepare. The letters of the alphabet and the major subject headings as explained on page 6 may be printed in capital letters with black ink directly on the guide card tab, or, adhesive labels on which the caption can be printed or typed are available in various sizes in pad form or in continuous strips in roll form.

Preparing Index Cards

MAKE ENTRIES ON ONLY ONE SIDE OF AN INDEX CARD. As mentioned before, entries should be brief, accurate and uniformly spaced. Yet, each entry must be complete enough to identify the action but not so complete as to preclude reference to the actual minutes. Never allow the index to supplant the minutes for the minutes are the official "last word." The purpose of an index is merely to assist in finding information, not to substitute for the information contained in the minutes. Index cards are prepared as follows:

Inserting the Heading

19-- CURBING

Explanation:

3 spaces from the left margin insert year. Skip 2 spaces then begin first word of heading. TYPE HEADING IN CAPITAL LETTERS. If a more descriptive heading is desired, especially for cards that make up a series, follow the principal word or words of the heading with a comma, then insert the qualifying information, as shown in the examples below.

1958 CURBING, APPROVED
 1958 CURBING, BIDS RECEIVED
 1958 CURBING, CONTRACTS AWARDED

If more than one index card per heading is required, type the heading that is on the first card on each additional card. To indicate that there is more than one card per heading, number each card consecutively 1, 2, 3, etc., by placing the appropriate numeral in parenthesis 2 spaces to the right of the last letter of the heading. An example is shown below of the second card prepared for a heading.

19-- EASEMENTS, SIDEWALK (2)

MAKE ENTRIES ON ONLY ONE SIDE OF AN INDEX CARD

Inserting Entries and Volume and Page References

It is not necessary to prepare an individual card for each action recorded in the minutes. Once an index card has been prepared for a subject, entries are entered on the card in chronological order as illustrated by the following examples.

Example 1.

In this example is a single subject, BUDGET. The minute book actions summarized here are typical. In actual practice each entry would be entered on the index card currently upon approval of the minutes of each meeting. The card reproduced below was constructed from the following actions:

Preliminary budget estimates were recorded in the minutes for the meeting of October 4. (Volume 24, page 171)
 A hearing on the preliminary budget was ordered by resolution at a meeting held October 8. (Volume 24, page 203)
 The hearing was held at a meeting on November 10.
 (Volume 24, page 235)
 The preliminary budget was adopted as the final budget by resolution at the same meeting, November 10.
 (Volume 24, page 237)

19-- BUDGET	
preliminary estimates	24:171
preliminary budget, hearing ordered	24:203
preliminary budget, hearing held	24:235
preliminary budget adopted as final budget	24:237

Explanation:

Begin first entry 2 lines below the heading. The first letter of the entry should be in alignment with the first letter (exclusive of the date) of the heading, as shown above. Set tab stop of typewriter for 10 spaces from the right edge of the card for volume and page citation. Use a colon to separate volume and page as shown in the example. (Refer to Appendix B, page 43 for other methods of citing volume and page.) Begin each entry on a new line. If the entry requires more than one line, indent the second and succeeding lines 3 spaces. Do not capitalize the first word of an entry unless it is a proper name. Omit the period at the end of the entry.

Example 2.

In this example, a report of injury to an employee, George D. Brown, was recorded in the minutes of the meeting of January 18. (Volume 12, page 68.) At the May 3rd meeting Brown was appointed Assistant to the Assessor. (Volume 12, page 228.) Two months later, at the July meeting, Brown's letter of resignation was accepted. (Volume 12, page 289.)

The subjects of the above example are:

1. A proper name. The simple rules for alphabetizing proper names, Appendix A, indicate that George D. Brown is alphabetized as BROWN, GEORGE D.
2. An injury. Referring to the list of common subject headings beginning on page 9, the indexer will find INJURIES listed.
3. An appointment. Again, APPOINTMENTS is designated a common subject heading in the list beginning on page 9.
4. The fourth subject, ASSESSOR, ties in Brown's appointment to the official whom he was appointed to assist.
5. A resignation. This subject, as will be noted in the list of common subject headings (page 12), is cross-referenced to SEPARATIONS.

These subjects are indexed on cards as follows:

19-- BROWN, GEORGE D.	
injury	12:68
appointed Assistant to Assessor	12:228
resignation	12:289

19-- INJURIES	
Brown, George D.	12:68

19-- APPOINTMENTS

Assistant to Assessor,
Brown, George D. 12:228

OR

Brown, George D., Assistant
to Assessor 12:228

19-- ASSESSOR

Assistant to, appointed 12:228

19-- SEPARATIONS

Assistant to Assessor,
Brown, George D. 12:289

OR

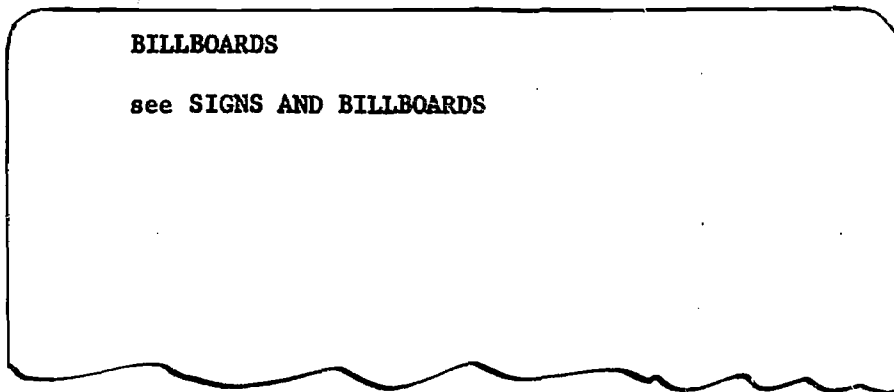
Brown, George D., Assistant
to Assessor 12:289

Preparing Cross-Reference Cards

In any index some cross-referencing is necessary. A cross-reference, as explained in DEFINITIONS, refers the searcher or user of the index from a possible heading under which no entries or page references are given to the chosen heading where they may be found. For example, in this index the heading SEPARATIONS is used in place of RESIGNATIONS because the former heading covers not only resignations but also dismissals, retirements, and severances due to death, illness, or physical incapacity. This is a good example of choosing a heading that is specific enough to be useful in an index but, at the same time, broad enough to provide a place for indexing the several means by which the services of personnel are terminated.

Some suggested cross-references are identified by an (X) to the left of the heading in the list of common subject headings on pages 9 through 13. Others may be inserted at the discretion of the indexer.

Below is an example of a properly prepared cross-reference card.



Note that the heading and entry have been inserted in the same manner as a subject card with the exception of the year designation which has been omitted since cross-references do not change from year to year. Unless a cumulative index is prepared as explained on pages 37 through 39, cross-reference cards need to be prepared only once. If a cumulative index is established, a second set of cross-reference cards will be necessary.

HOW TO INDEX BONDS AND NOTES

All bonds and notes (except surety bonds) are indexed either under the detailed method shown below or the alternate short-form method which follows.

19-- BONDS AND NOTES, DRAKE WATER DISTRICT

Ext. #3, bond, \$100,000	23:113
Ext. #3, note, \$100,000	23:114
renewal note, \$50,000	24:73

19-- BONDS AND NOTES, HIGHWAY EQUIPMENT

bond, \$20,000	24:47
----------------	-------

19-- BONDS AND NOTES, STREET SURFACING

bond, \$45,000	24:55
note, \$45,000	24:56

Alternate Method of Indexing Bonds and Notes

If the volume of bonds and notes does not require the extensive indexing described on the preceding page, the short form illustrated below may be used.

19-- BONDS AND NOTES

Drake Water District, Ext. #3, bond, \$100,000	23:113
Drake Water District, Ext. #3, note, \$100,000	23:114
highway equipment, bond, \$20,000	24:47
street surfacing, bond, \$45,000	24:55
street surfacing, note, \$45,000	24:56
Drake Water District, note, renewal of, \$50,000	24:73

These entries should also be repeated on the appropriate subject cards, as shown below.

19-- DRAKE WATER DISTRICT, EXTENSION #3

hearing ordered	23:87
hearing held	23:107
approved	23:111
→ bond, \$100,000	23:113
→ note, \$100,000	23:114

19-- HIGHWAY DEPARTMENT PURCHASES

used truck	23:240
bituminous materials, contract awarded	23:299
→ equipment bond, \$20,000	24:47
salt, proposals invited	24:76

19-- STREET SURFACING

Hill Drive, approved	23:267
Almay Road, petition for	23:289
Winding Road, hearing ordered	24:34
→ bond, \$45,000	24:55
→ note, \$45,000	24:56

Note: see also other examples under HOW TO INDEX STREETS
AND STREET IMPROVEMENTS, pages 31 to 35.

19-- DRAKE WATER DISTRICT

easement, payment for	23:189
→ water main approved, Ridge Road	23:233
note, renewal of, \$50,000	24:73
pumping equipment, construction of authorized	24:156

HOW TO INDEX DEPARTMENTS

Entries pertaining to a municipal department or a department which is part of a special district are indexed under the name of the department as shown in the examples below. In addition, these entries are repeated on the appropriate subject cards as indicated following each example.

19-- ALBERTA FIRE DEPARTMENT

active members	6:155
telephone extension, change of	6:165
fireworks permit granted	7:250

Note: In the above example, the entry "telephone extension" would also be indexed under TELEPHONES; the entry "fireworks permit" would also appear under FIREWORKS.

19-- HEWLETT WATER DEPARTMENT

foreman, appointment	14:92
holiday work, compensation for	14:132

Note: In the above example, the "foreman" entry would also be indexed under APPOINTMENTS; and the entry "holiday work" would also appear under COMPENSATION.

To complete the indexing of departments, cross-reference cards should be prepared on which are listed by name all the departments of a given type, as shown in the two examples below.

19-- FIRE DEPARTMENTS

see:

Alberta Fire Department
 Blackwood Fire Department
 Seacliff Fire Department

19-- WATER DEPARTMENT

see:

Hewlett Water Department

An alternative method is to prepare a cross-reference card on which all departments are listed. An example of this method of cross-indexing departments is shown below.

19-- DEPARTMENTS

fire departments, see:

Alberta Fire Department
 Blackwood Fire Department
 Seacliff Fire Department

sewer department, see:

Ozone Sewer Department

water department, see:

Hewlett Water Department

HOW TO INDEX FIRM NAMES

References in the minutes to firm names should be indexed in accordance with the rules for alphabetizing proper names given in Appendix A, page 42. The cards reproduced below show the proper alphabetizing of two common types of firm names.

19-- BUCKLEY HEATING AND VENTILATING COMPANY

heating contract, treatment plant	23:146
air conditioning contract, municipal building	24:186

19-- SMITH, JAMES A., COMPANY

heating contract, treatment plant	23:146
air conditioning contract, municipal building	24:186

The entries indexed under the firm names are also indexed under the other subjects contained in each entry, for example:

19-- TREATMENT PLANT

heating contract, awarded	23:146
---------------------------	--------

19-- MUNICIPAL BUILDING

air conditioning contract, awarded 24:186

HOW TO INDEX NAMES OF INDIVIDUALS

The example below shows the proper method of indexing the name of a person. The indexer should also refer to the rules for alphabetizing, Appendix A, page 42.

19-- SMITH, JANET M. (MRS.)

appointed part-time policewoman 23:80

In addition, an entry indexed under the name of an individual should also be indexed under its other appropriate subjects -- in this example, **APPOINTMENTS**.

19-- APPOINTMENTS

laborers, Rogers, John A., and
Thompson, George D. 23:54

→ policewoman, part-time, Smith,
Janet M. (Mrs.) 23:80

foreman, sanitation department,
Allen, Elmer E. 23:157

HOW TO INDEX ORDINANCES

A reference in the minutes to an ordinance is indexed as shown in the example below.

19-- ORDINANCES, TRAFFIC

19-- ORDINANCES, SLAUGHTERHOUSES

19-- ORDINANCES, GARBAGE AND REFUSE

preparation of, authorized	24:10
hearing ordered	24:45
hearing held	24:51
approved	24:54
affidavit of posting	24:67

HOW TO INDEX REPORTS

Reports that are cited in the minutes are indexed in the same manner as ordinances, as shown by the following examples.

19-- REPORTS, HEALTH OFFICER

19-- REPORTS, CLERK

19-- REPORTS, BUREAU OF PARKS

annual report	4:13
monthly, January	4:15
monthly, February	4:36
monthly, March	4:54
operations, special summary, first quarter	4:57

HOW TO INDEX SPECIAL OR IMPROVEMENT DISTRICTS

An index card should be prepared for each action pertaining to a special or improvement district in the minutes. The cards reproduced below are examples of SPECIAL DISTRICT cards.

19-- DRAKE WATER DISTRICT

water main, Robin St., cleaning	15:282
pumping equipment, construction of authorized	15:283
water mains, hearing ordered	15:290
water mains, hearing held	16:11
water mains, proposals invited	16:18
water mains, bids received	16:22
water mains, contract awarded	16:40

19-- LIGHTING DISTRICT #10, EXTENSION #7

hearing ordered	3:256
hearing held	3:280
established	3:293

In addition, it is a good idea to prepare an index card listing the names of all districts of a given category, as shown below. The insertion of this card in its proper alphabetic order in the index will assist those users of the index who may be unfamiliar with the proper names of the districts.

WATER DISTRICTS

see:

Drake Water District
Goodman Water District
Highpoint Water District
Water District #1

LIGHTING DISTRICTS

see:

Lighting District #3
Lighting District #10
Maple Hill Lighting District
Oppenheim Lighting District

HOW TO INDEX STREETS AND STREET IMPROVEMENTS

Actions pertaining to streets and street improvements may be indexed in either of three methods depending on the amount of volume of data to be indexed and the completeness of indexing desired. Method 1, described on page 32, is the most complete method of indexing street improvements and is recommended for larger units of local government or in cases where very complete coverage of these subjects is desired. Method 2, page 34 is suitable in cases where there is insufficient volume of street improvement data to warrant the extensive indexing described in Method 1. Method 3 is the shortest form of indexing street improvements, consisting of merely a cross-reference card as shown on page 35.

Regardless of the method used, an individual card is prepared for each street, the same as for any other proper name, as follows.

19-- ALMAY ROAD

surfacing, petition for	24:78
surfacing, hearing ordered	24:78
surfacing, hearing held	24:82
surfacing, approved	24:83
surfacing, bids invited	24:84
surfacing, bids received	24:97
surfacing, contract awarded	24:99

19-- TUDOR LANE

sewers, continuation of installation ordered	23:155
closing	23:173
sidewalks approved	23:287
sidewalks, easement, relocation	24:81
sidewalks, proposals invited	24:85
curbing, hearing ordered	24:97

Method 1:

When there is a considerable volume of data pertaining to street improvements, it is recommended that each component of the street improvement be separately indexed on cards arranged in alphabetical order. The arrows superimposed on the cards used in the examples below point out the entries which appear on the "Almay Road" card on the preceding page.

19-- STREET SURFACING, APPROVED

Hilltop Road	23:187
Bender Lane	23:209
Adams Street	23:267
→ Almay Road	24:83
Brevator Street	24:89

19-- STREET SURFACING, BIDS INVITED

Ridgewood Road	23:297
Winding Road	24:32
Hawley Court	24:36
Westchester Drive	24:62
→ Almay Road	24:84
Wellington Road	24:104

19-- STREET SURFACING, BIDS RECEIVED

Jordan Boulevard	23:289
St. Clair Drive	24:22
Macon Avenue	24:62
→ Almay Road	24:97
Berwick Drive	24:119

STREET SURFACING, BONDS AND NOTES

see BONDS AND NOTES, STREET SURFACING

19-- STREET SURFACING, CONTRACT AWARDED

Elk Street	23:110
Beaver Street	23:245
Madison Avenue	23:248
Sherman Drive	23:299
Denton Road	24:44
Osborne Road	24:56
→ Almay Road	24:99

19-- STREET SURFACING, HEARING HELD

Marlboro Avenue	23:201
Montrose Drive	23:220
Ginger Bread Lane	23:286
Old Ox Road	24:78
→ Almay Road	24:82
Apple Tree Lane	24:123

19-- STREET SURFACING, HEARING ORDERED

Lockridge Road	23:197
Buffalo Avenue	23:210
Cherry Street	23:246
English Drive	23:287
Almay Road	24:78
Britton Lane	24:102

19-- STREET SURFACING, PETITION FOR

Hudson Avenue	23:261
Brockley Drive	23:288
Bogart Terrace	24:10
Almay Road	24:78
Sunset Drive	24:98

Method 2:

Street improvements such as curbing, sidewalks, surfacing may be indexed in the short form shown on the next page. If this method is used, one card as shown in the following example will be substituted for the several cards required by Method 1, page 32.

19-- STREET SURFACING

Howard Road, petition for	23:269
Almay Road, petition for	24:78
Almay Road, hearing ordered	24:78
Hudson Avenue, approved	24:80
Almay Road, hearing held	24:82
Almay Road, approved	24:83
Cardinal Avenue, hearing ordered	24:83
Almay Road, bids invited	24:84
Almay Road, bids received	24:97
Cardinal Avenue, hearing held	24:98
Almay Road, contract awarded	24:99

Method 3:

A cross-reference card as shown below may be adequate for indexing street improvements such as curbing, sidewalks and street surfacing in addition to the individual street name cards shown on page 31.

STREET SURFACING

see individual streets, by name

Note: If this method is used, prepare additional cross-reference cards where required in the manner shown above, headed CURBING and SIDEWALKS.

HOW TO INDEX DEVELOPMENTS OR SUBDIVISIONS

Below is an example of indexing an action concerning a development or subdivision. An index card is prepared for each subdivision or development by its proper name.

19-- GLENDORA SUBDIVISION

Section 7, map approved	23:114
Part 8, curbing and sidewalks approved	23:163
performance bond	23:257
letter of credit, reduction of	24:211
Section 8, map approved	24:248

To assist those who may be unfamiliar with the proper names of developments or subdivisions, it is helpful to insert in the index a card listing all of the developments or subdivisions, as shown in the example below.

DEVELOPMENTS (or SUBDIVISIONS)

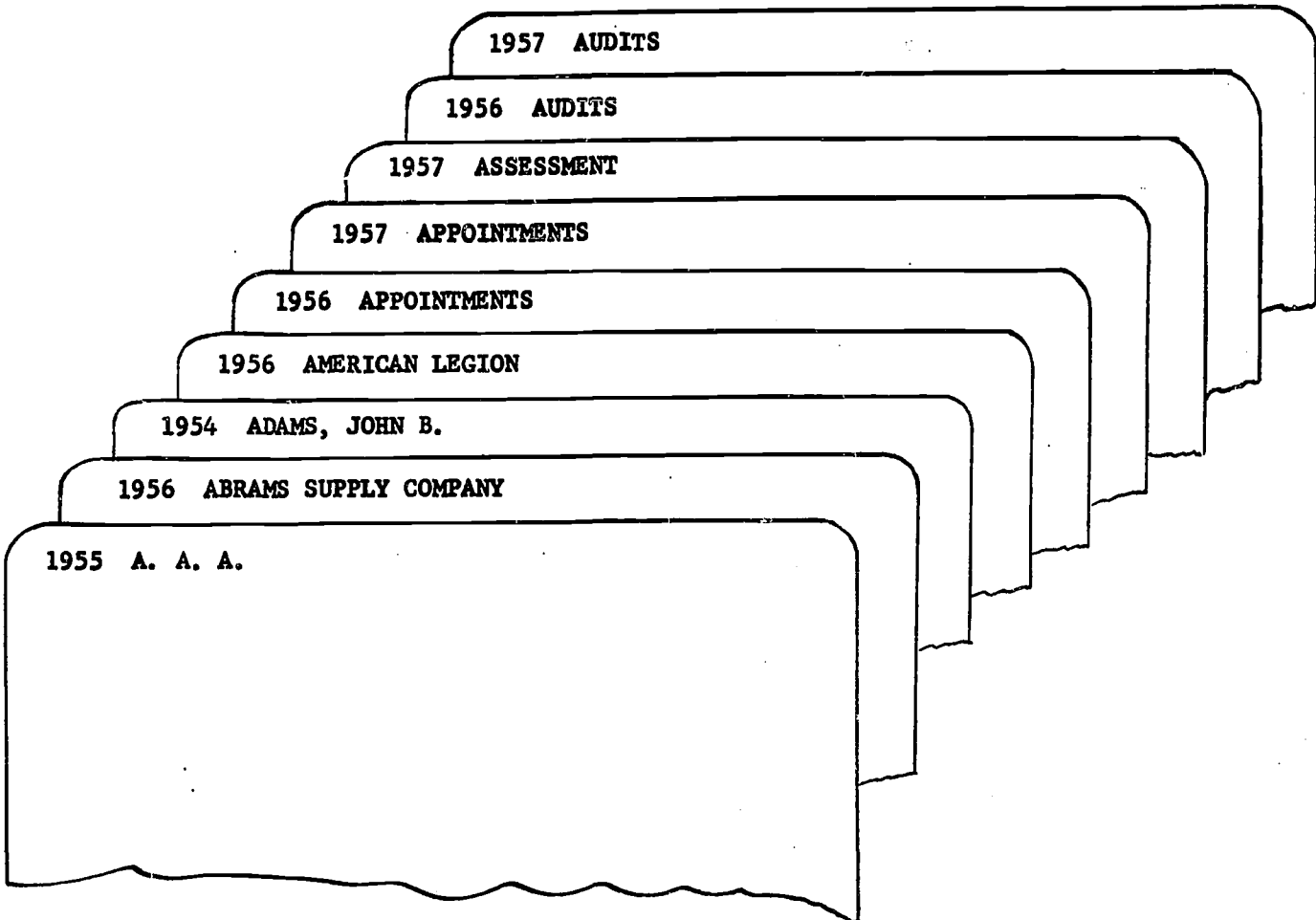
see:

- Apple Orchard Development
- Glendora Subdivision
- Hilltop Subdivision
- Kilarney Subdivision

SETTING UP THE CUMULATIVE INDEX

The cumulative index consists of the index cards prepared for all volumes of years prior to the current year. In other words, the index for 1957 becomes a part of the cumulative index in 1958.

The cumulative index is constructed by interfiling the index cards for the various past years in alphabetical and chronological order as shown in the illustration below.

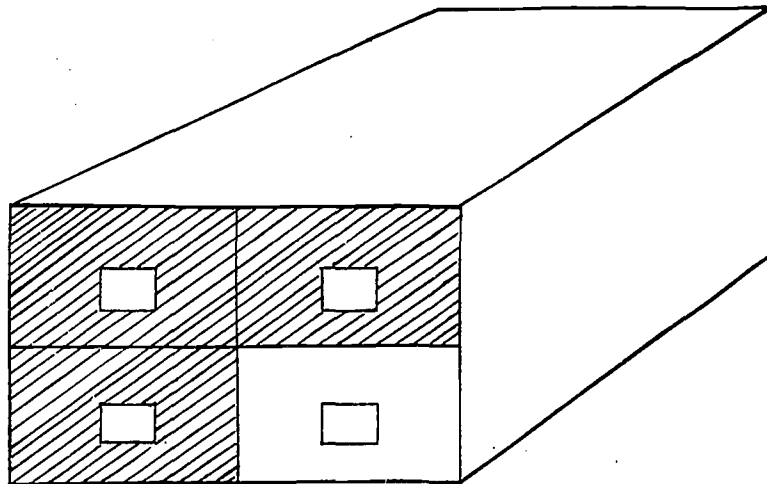


As shown in the example, identically captioned cards are interfiled in chronological order beginning with the earliest year.

In setting up the cumulative index it will be necessary to make another set of guide cards and additional end guides. This will have to be done only once, but it may be necessary later to insert additional third position guide cards and end guides as new major subjects are interfiled in the cumulative index.

When the cumulative index is set up it will also be necessary to prepare an additional set of cross-reference cards and to insert them at the correct alphabetical locations in the cumulative index.

The diagram below illustrates the current and cumulative parts of the basic index



Shaded areas represent cumulative index drawers.
Unshaded area represents current index drawer.

The chart on the following page indicates the steps required to establish the two parts of the basic index card file.

	First Year	Second Year	Third Year	Succeeding Years
STEP 1	Construct index currently during the year.	Remove index constructed for the first year and place it in an index drawer labelled "Cumulative Index."	Consolidate indexes constructed in first and second years by interfiling in Cumulative Index drawer.	Consolidate all previous index by interfiling in cumulative index drawer(s).
STEP 2		Construct index currently for the year.	Construct index currently for the year.	Construct index currently for the year.

HOW TO CONVERT THE BASIC INDEX FROM CARD TO BOOK FORM

A unique feature of the basic index is that it can be periodically converted from a card index to a conventional book-type index. At times this may be highly desirable since it permits utilization of the best features of both, namely, the flexibility of arrangement and ease of reference afforded by the card index and the compactness of the book index.

It is quite possible that over a period of time the accumulation of cards in the cumulative index drawers will become voluminous. At the same time the frequency of reference to the older cards in the cumulative index will generally decline. For these reasons a means of periodically converting the cards in the cumulative index to the more compact book form should not be overlooked.

The conversion of the basic index from cards to page form can be accomplished by either of two methods.

Cards in the cumulative index can be transcribed manually into page form by typing the entries from the cards onto pages. Care must be taken to type the cards in the same order in which they appear in the cumulative index. Transcribed pages should be carefully compared with the cards to eliminate typographical errors.

A far easier and quicker method is to convert the cards to page form by photographing or photostating them. This method also eliminates the possibility of typographical errors often made in a typed transcription.

To convert the card index to a book index by this method it is necessary only to lay out the cards as shown on page 41 and photostat or photocopy them. The number of cards that can be placed on a page will be determined by three factors: (1) size of page used; (2) size of index card used; and, (3) number of lines occupied by entries on each index card.

If the cumulative index has been set up as explained on pages 37 to 39, the cards will be in alphabetical and chronological order. Therefore, when preparing the cards for photostating or photocopying in page form it is necessary only to place the first card in the cumulative index at the top of the sheet of paper used as a guide for page size and arrange succeeding cards from that point down. When doing this, make certain that each succeeding card is placed just below the last entry on the previous card as shown in the example on the following page.

The question of when and how often to convert the index cards into a book form of index must be determined locally. If an index in page form for each minute book is desired, it is necessary merely to type or reproduce by photograph or photostat the cards that index that book. If, on the other hand, it is desired to prepare in page form a periodic index covering several years of minute books, it will be necessary to accumulate the index cards covering the minutes for that period and then proceed as described above. Larger units of local government having relatively more complex minutes may find it desirable to prepare a periodic index in book form every five years. Smaller units of local government with less voluminous minutes may decide to retain the index in card form for ten years or longer before converting it to the book form of index. The length of time the basic index is used in card form will probably be determined to a large extent by the volume of index cards.

APPENDIX A

SOME SIMPLE RULES FOR ALPHABETIZING

Rule 1. The name of an individual is alphabetized by the first letter of the surname in the following order: (1) surname, (2) given name(s) or initials. Thus John J. Brown is alphabetized Brown, John J.

Rule 2. A surname containing a prefix, such as d', de, Mc, Mac, Van, von, etc., is considered as one word and is alphabetized according to the first letter of the prefix. Thus Mac Bride is alphabetized before Mc Bride, Van Zandt before von Elm, and d'Amico before De Meo.

Rule 3. A given name expressed only as an initial is alphabetized before a name beginning with the same letter as the initial. Likewise, a surname with only one given name precedes the same name having a middle initial or name. The application of Rule 3 is illustrated in this example:

- | | |
|---------------------|-----------------------|
| (1) Baker, N. | (4) Baker, Neal |
| (2) Baker, N. S. | (5) Baker, Neal S. |
| (3) Baker, N. Scott | (6) Baker, Neal Scott |

The above rule is known as the "nothing before something" rule and applies equally to subjects other than proper names, as shown in the following example:

- (1) Zoning
- (2) Zoning Amendments
- (3) Zoning Amendments Approved

Rule 4. Firm names and names or titles of institutions that do not contain the full name of an individual are alphabetized as written, for example: Grace Methodist Church, P-D Supply Company, National Garage, Smith Oil Company.

Rule 5. Names of institutions and firms that contain the full name (or surname and/or initials) of an individual are alphabetized in the following order: (1) surname, (2) given name(s) or initials, (3) remainder of firm name or title. Therefore, A. Buckley, Incorporated is alphabetized as Buckley, A., Incorporated whereas Smith Oil Company, because it does not contain the full name or surname and initials of an individual is alphabetized as written -- Smith Oil Company.

Rule 6. Disregard the article "the" in a firm name or title of an institution and place it in parenthesis at the end of the title when alphabetizing. For example, The Albany News is alphabetized as Albany News (The); The Statler is alphabetized as Statler (The).

APPENDIX B

ADAPTING THE BASIC INDEX TO OTHER METHODS
OF VOLUME AND PAGE IDENTIFICATION

There are numerous systems used by local public offices to identify minute books by volume and page. The basic index can be easily adapted to any method favored by a particular office. The following examples show how the basic index can be adapted to several common methods of volume and page identification.

Example 1.

In this example the volumes are identified only by inclusive dates which are generally marked on the spine of the book. The beginning date of the first volume for which entries appear on the card is inserted in the upper left corner of the card on the same line as the heading. If a succeeding volume is to be indexed on the same card, insert its beginning date 2 spaces from the left margin of the card and 2 lines below the last previous entry. The first entry for this new volume should be started 2 lines below the beginning date of the volume.

1-1-57	CURBING, APPROVED	
	Hilltop Road	187
	Lincoln Avenue	196
	Bender Lane	209
7-1-57		
	Adams Street	28
	Wellington Road	97
	Delaware Avenue	134

Note that only the page number appears in the right hand column since the beginning date of each volume has been inserted 2 spaces from the left margin of the card.

Example 2.

In this example, the volumes are identified only by letters in alphabetical order, the letter "A" designating the first, or earliest, volume. Two volumes are cited in the example below, volume "G" and volume "H." The first volume created in the succeeding year would be lettered "I."

19-- CURBING, APPROVED

Hilltop Road	G:187
Lincoln Avenue	G:196
Bender Lane	G:209
Adams Street	H:28
Wellington Road	H:97
Delaware Avenue	H:134

Example 3.

In this example, the first volume created each year is lettered "A" and subsequent volumes are lettered in alphabetical order. The only difference in this method and that described in example 2 is that each year the first volume is designated volume "A."

1957 CURBING, APPROVED

Hilltop Road	A:187
Lincoln Avenue	A:196
Bender Lane	A:209
Adams Street	B:28
Wellington Road	B:97

1958 CURBING, APPROVED

Rumson Road	A:182
Winding Road	A:190
Greenwood Place	B:45