

Analysis of 2016 Society Summit: Discussions & Evaluations

At the 2016 event participants broke into small groups to discuss things that their respective societies did well and to identify challenges they face. Participants also had an opportunity to provide additional feedback on the post event survey.

Provided below is a compilation of the information that was provided, grouped by what could be as topics for the panel discussions that will be a part of the 2017 event.

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Strategies to retain/Increase Membership:

- Looking at ethnicity
- Wonder, dream, regarding diversity and change
- Mentoring
- methods of communication
- How are new members/visitors welcomed?
- engaging members often
- engaging members to be involved
- Program survey of members.
- Survey membership for their talents
- Finding out what the interests are in current members.
- Identifying skills of members & put them to use
- Invite members to participate in functions
- Change the society to match the change of the people
- Updating membership form to include volunteer interest section
- Benefit remote members thru volunteer lookups
- Using more social media sites to reach younger people
- Extending an invitation to out of county members to help by doing index projects.
- Work with Boy Scout/Girl Scout programs in community (that attracts their parents as members)
- Wine and cheese party to attract empty nesters (to add members)
- identify your brick wall; place all in pot, draw 1 to be worked on
- Several societies mentioned the importance of using publicity and social media to promote their meetings and activities, both before and after the events.
- Several societies stressed the importance of having a greeter to welcome new members to their meetings.
- Several societies offer some form of new member packet, either online or paper
- Have volunteers do one-on-one sessions with new members
- Several societies offer “road programs”, a standard presentation they give to groups of seniors, retiree organizations or scout troops.
- Several societies offer novice programs, typically in conjunction with their local library.
- Several societies engage in projects (typically cemetery related) and conduct help sessions with their members
- Several societies partner with local historical societies on programs and projects.
- One society offers a \$5.00 bounty to members for every new member they bring to the society.
- Lock-In’s to work on brick walls
- Attract youth by showing them something about their grandparents
- Economies of scale – combine efforts with adjacent counties and/or other societies to hire speakers and run seminars

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- Good publicity and marketing for events may lead to attendees/participants becoming members
- Stress benefits of membership, and what membership supports. Consider different levels of membership
- Helping (and utilizing) remote members without overloading local members is a challenge
 - Indexing Projects
 - Volunteer Lookups
 - Online cemetery records
- Younger adults are harder to engage... they want fast results
- Help educate/train library staff become knowledgeable about genealogy
- Have students (choir, bands, marching groups) entertain at meetings. Have ROTC groups present the flag
- Offer door prizes
- Orient presentations so they help people gain skills no matter the location of their ancestors

Marketing/Social Media

- publicity ideas
- Media presence
- using social media to reach more people
- Using more social media promotion
- looking at all avenues of technology to reach out
- Use waypoints to inform - using Pinterest and Instagram to reach millennials
- We need an internet presence (better than what we have)
- Radio announcements
- Use the words 'family history' to move to modern thinking.
- How differently Millennials think
- Appeal to Boomers by leaving a legacy -- the family's history
- Membership drive, but will tweak a little bit.
- Providing intro to genealogy to retiree groups, etc.
- Lack of skills/training/knowledge is a real barrier
- Some members do not use email
- Goal: get information about meetings & events into newspapers, to libraries and other organizations, flyers to senior centers, newsletters to public places
- Utilize Facebook and YouTube
- Arlington has a mobile classroom (bus) genealogy classes
- Offer a college scholarship
- Make sure the name of your society does not exclude people
- Try to avoid scheduling meetings at the same time as other competing organizations
- Advertise meetings on services like Nextdoor or Meetup

Society Management and Leadership

- Societies have the same issues
- Everyone has problems gaining membership
- Our problems are common to us all
- Some board members are stuck in a rut, doing things same way all the time. "Always did it that way" has no value.
- people reluctant to serve on board
- It's difficult to get volunteers
- Wonder, dream, regarding diversity and change
- Remain faithful to the mission of the Society
- Environment Scan

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- Societies that combine with organizations are growing
- Include social media as part of your projected goals
- Rely on fact based not heart based decisions & know how to tell the difference
- Change the society to match the change of the people.
- Stay ahead technologically
- Networking more
- Hire, Inspire, Admire, Retire
- Ready, Fire! Aim, Fire!
- Mentoring
- Drill down with the five "why's" on problems
- Take a risk and change immediately. Try it out for size, without long and total consensus planning
- Invite members to engage/serve in your organization
- Identifying skills of members & put them to use
- We have to work/think outside the box
- Don't be afraid to try something new!
- methods of communication
- Succession Planning:
 - Several societies mentioned the importance of making personal contact with members to invite them to serve.
 - One society has a place on their membership form for new and renewing members to list their current/former occupation, to help identify the individual skills of their member.
 - One society has a place on their membership form for new and renewing members to indicate their willingness to serve as an officer and/or committee chair
- Volunteers are more willing to take on short duration, well defined tasks than they are to long term commitments (like being on the board or on a committee)
- Having well documented methods and procedures (not just bylaws) is a plus
- Technical is a challenge (hard to find people with the necessary skills) and a barrier (many people are afraid/unwilling to learn
 - In-house training/workshops can help develop members with skills
- Some societies are still on RootsWeb. Many are choosing EasyNet
- Google for non-profits may be a good choice
- Take steps to make board transition easier (store physical records in a central location or have them available electronically)

Qualities of a Leader/Leadership strategies

- Leadership involves the whole society not just the president
- If you're not with your team, there is no team
- importance of being an effective listener: Active listening and communicating
- Inspiration needs executing - tomorrow is too slow
- Be a positive leader; act-not react
- Being innovative
- The need to follow through on new ideas
- Work with many different styles of people
- Mentoring
- methods of communication

Fundraising Ideas

- Publishing to preserve history and raise funds
- Partnering with local restaurants for fundraising
- Use of restaurant nights for fund raising

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- Possible appealing to local bank for financial donation as 'community support'
- One society has restaurant night fundraisers. They partner with a local restaurant one night when members, their families and guests are invited to eat at the restaurant during a set time period. Members have an opportunity to interact informally, and the restaurant will rebate 10 – 20% of the proceeds to the society.
<http://www.ptotoday.com/pto-today-articles/article/8372-how-to-hold-a-successful-restaurant-fundraiser>
- One society participated in the Kroger Community Rewards, Tom Thumb Good Neighbor and Amazon Smile rebate programs. Last year these programs donated over \$800 to the society
- Some society members have employers who provide matching funds for the members gift of time or money to eligible nonprofits
- Several societies sell books, historical photographs and cookbooks for supplemental income.