

Executive Summary

This has been a year of positive momentum and introspection for the Dallas Genealogical Society.

The positive momentum was brought about by the installation of a board with a great deal of talent and enthusiasm. The many accomplishments and innovations described throughout this report have been brought about by their leadership and by the hard work and an amazing contribution of time and talent by our Directors, Advisors and volunteers.

The cause of the introspection was the celebration of the 60th year of our existence as a society. The richness of our history and accomplishments was documented in the 60th Anniversary Commemorative Issue of *Pegasus, The Journal of the Dallas Genealogical Society*, and further amplified by an outstanding presentation of additional historical details at our May general meeting.

As we begin our next 60 years we stand at the top tier among Genealogical Societies in the United States. We have a cash flow that supports our ongoing activities and a substantial cash reserve. Our membership is increasing. And we have a growing base of volunteers who are actively engaged in and supporting the activities of the society.

From my perspective, the only thing more exciting and impressive than our past is the potential for our future.

Tony Hanson
President, Dallas Genealogical Society
2015 - 2016

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The Dallas Genealogical Society is organized and operated as a non-profit tax-exempt Section 501(c)(3) organization as defined by the Internal Revenue Service. The mission of the organization is defined in our articles of incorporation and focuses on three primary areas: education; preservation; and providing support for the Genealogy Section of the J. Erik Jonsson Central Library in Dallas, Texas.

This annual report covers operational activities from September 2015 through August 2016 and financial activities from October 1, 2015 through September 30, 2016.

2015 - 2016 Board of Directors

The board of directors for this period assumed office on September 5, 2015 and served until September 10, 2016.

Executive Board

- | | |
|--------------------------|----------------|
| • Tony Hanson | President |
| • Kathleen Murray | Vice President |
| • Susan Rainwater | Treasurer |
| • Brenda Cannon | Secretary |
| • Sandra Crowley | Past President |

Directors

- | | |
|-------------------------|--|
| • Cheryl Freeman | Director of Education |
| • Gloria Goodwin | Director of Membership |
| • Carolyn Davis | Director of Publicity/Public Relations |
| • Harmon Adair | Director of Printing & Distribution |
| • Mic Barnette | Director of Volunteer Coordination |

Advisors

- | | |
|------------------------------------|-------------------|
| • Barbara Ware | IT Administration |
| • Todd DeDecker | Webmaster |
| • Jimmy Walters | Sales Manager |
| • Bob Lane & Linda Lane | Hospitality |

Activities

Activities and accomplishments in each of the three primary areas of our mission for the report period are summarized below.

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To educate, by creating, fostering and maintaining interest in genealogy

General Meetings

Our monthly meetings are an important component of our educational mission. They are free and open to the public and consist of a brief business meeting followed by an educational presentation of interest to our attendees. Thanks to the scheduling efforts of Cheryl Freeman, our Director of Education, we were honored to have the following speakers and presentations.

- **September 5, 2015:** Debra Polsky, Executive Director of the Dallas Jewish Historical Society, discussed the purpose and activities of her organization. Attended by 45 members and 2 visitors.
- **October 3, 2015:** Rusty Brenner from Texas Cemetery Restorations discussed cleaning, leveling, and repair of cemetery tombstones, GPS Mapping and Burial Databases for Cemeteries and the use of Ground Penetrating Radar to locate unmarked graves. Attended by 42 members and 1 visitor.
- **November 7, 2015:** Alan C. Lowe, Director of the George W. Bush Presidential Library and Museum, discussed "The Presidential Libraries and the George W. Bush Presidential Center". Attended by 27 members.
- **January 9, 2016** - Judy Knight presented "From Respected Lawyer to Counterfeiter. Digging for details using genealogical and federal court and penitentiary records tells quite a story". Attended by 25 members and 7 visitors.
- **February 6, 2016:** Dr. Steven Butler presented "How to Find Your English Convict Ancestor". Attended by 36 members and 6 visitors.
- **March 5, 2016:** Barbara Rust, an archivist in the National Archives-Southwest Region discussed "North Texas Naturalization Records at NARA Fort Worth". Attended by 30 members and 4 visitors.
- **April 2, 2016:** Ari Wilkins, a genealogist who works in the Genealogy section of the Dallas Public Library, discussed Ante-Bellum Southern Plantation Records. Attended by 37 members and 4 visitors.
- **May, 2016:** Carolyn Davis, Barbara Ware, Kathleen Murray, Tony Hanson, Shirley Slote and Lloyd D. Bockstruck presented a look back at the 60 year history of the Dallas Genealogical Society. Attended by 52 members and 5 visitors.

Special Interest Groups

Interest in and support for our Special Interest Groups has continued over the past year. Total attendance for all groups for this period was 660.

- **The African American Special Interest Group** has met monthly under the leadership of Lois Lilly
- **The Jewish Interest Group** has met monthly under the leadership of Liz Kutz
- **The Brown Bag Group** has met monthly under the leadership of Janet Khashab and Liz Kutz
- **The Technology Group** met September through May under the leadership of Suzan Younger
- **The MacGen Group** met every other month under the leadership of Happi McQuick

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- Due to growing interest in DNA and the leadership of Mic Barnett and Barbara Ware a **DNA Interest Group** launched in September 2015 and met monthly through May, 2016.

Two additional groups were organized over the summer of 2016 and began quarterly meetings in September under the leadership of Tresa Tatyrek:

- **Roots Magic**
- **Next Generation Sitebuilder**

Seminars

While our seminars provide a substantial source of the funding for our organization, we also view them as an effective way to fulfill our educational mission. We bring nationally and internationally recognized speakers to Dallas and provide an opportunity for attendees to learn from individuals who are experts in their respective fields. Through the use of volunteers, and prudent cost management, we are able to keep the cost of attendance at a minimum, thus making them more accessible to a wider audience.

Post event surveys are sent electronically to all attendees. The results, summarized for each event listed below, have been uniformly high.

- **Fall Seminar - October 24, 2015 - Michael Locapo:** *“Thinking, Assessing, & Storytelling: Genealogy Beyond Birth, Marriage, & Death”* - We had 97 attendees at this one day event: 81 (84%) members, 16 (16%) non-members. Respondent’s combined ratings of excellent and very good were: Quality - 97%; Relevance of Topics - 97%.
- **Spring Seminar - March 12, 2016 - Paul Milner:** *“From Whence They Came”* - We had 130 registrants with 122 attendees at this one day event: 94 (71%) members, 36 (29%) non-members. The survey results for this event were also very positive. Respondent’s combined ratings of excellent and very good were: Quality - 91%; Relevance of Topics - 95%.
- **Summer Seminar - July 29 2016 - Denise Levenick:** *“Preserving and Sharing Our Family Treasures”* - We had 75 registrants with 72 attendees at this two day event: 63 (85%) members, 11 (15%) non-members. The survey results for this event were also very positive. Respondent’s combined ratings of excellent and very good were: Quality - 100%; Relevance of Topics - 96%.

Annual Awards

The Dallas Genealogy Society annually recognizes individuals and organizations for their contributions towards the goals of the society. These awards are presented at our annual Awards Lunch. Additionally, the winners of the annual Writers Contest are recognized at this event..

58 members and 5 guests attended this year’s Awards Lunch, which was held on December 12, 2015 in the Community Showcase Room on the 1st floor at the J. Erik Jonsson Central Library in Dallas. Admission was free for members, \$15 for non-members.

The recipients honored in December, 2015 included the following:

- Award of Merit: **Sandra Crowley**
- Heritage Preservation Award: **The Dallas Jewish Historical Society**
- Lloyd DeWitt Bockstruck Distinguished Service Award: **Sammie Townsend Lee**
- Volunteer of the Year: **Todd DeDecker**

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- President's Special Award: **Jeri Steele**

Writing Contest

The Society sponsors an annual writing contest and offers a total of \$950 in prizes. Selected articles from this competition are published in *Pegasus, Journal of the Dallas Genealogical Society* publication.

The 2016 winners were:

- 1st Place – “A Case Study in Using DNA for DAR Membership: First Successful Application” – **Ray Harriot**
- 2nd Place – “The Elusive Andrew Lyday, 1804–1849” – **Jana Walker**
- 3rd Place – “Alice’s Looking Glass: Reflection on the Prussian Drahn’s to Texas” – **Vicki Ayo**

To collect, preserve and index information related to Dallas County and its early history

Pegasus - The Journal of the Dallas Genealogical Society

The DGS launched *Pegasus: Journal of the Dallas Genealogical Society*, a scholarly journal, in 2013 as a replacement for our annual *Journal*.

The focus of articles published includes the following:

- Advanced methodologies and case studies emphasizing an approach to a problem
- Family histories and genealogies linked to North Texas, including those families who came from or left to settle elsewhere than North Texas
- Historically interesting events in North Texas, including a connection with a local family
- Histories of ethnic or military groups, or of neighborhoods and houses, specific to North Texas

Thanks to the efforts of Sandra Crowley, Janet Khashab and Marianne Szabo and many other volunteers, two issues were published during this report period:

Volume 3, Number 1 (July, 2015)

- *As the Angus Roam* by **Deborah R. Harvey and Gary E. Wood**.
- *Following Fannie: Fannie Young (Moore) Jumper Hayes Mullicane (1877 – 1976)* by **Jennifer Shipley-Sullivan**
- *My Abuelita DNA, and My Family Tree* by **Janet Paulos Khashab**

Volume 3, Number 2 (December, 2015) - 60th Anniversary Commemorative Issue

- Part I - The Early Years
- Part II - Images & Articles 1954 - 2015
- Part III - Awards

The Society also utilizes the services of a layout editor to produce Pegasus. A per-page fee is paid for these services. **Julie Cahill Tarr** performed this service for the two issues published in 2015.

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Printed copies are sent to members who have elected to receive them, and electronic (PDF) versions are available to all members on the website. The cost to produce and mail each printed copy was on the order of \$13 per copy. Electronic (PDF) versions become public two (2) years after publication.

Dallas County Probate Records from 1850 to the early 1900's

In 1977, members of the Dallas Genealogical Society microfilmed Dallas County Probate Case files dating from 1850 through the early 1900's. These records are available on 33 reels of microfilm.

In 2013 the Society received a Rescuing Texas History grant from The Portal to Texas History to digitize the microfilms and make them available on the Portal to Texas History at the University of North Texas. Society members transcribed the 1977 index, which was used to create the metadata for each case.

In addition, Society volunteers have been engaged in a project to determine the year range for each case, something that was not originally indexed. This involves examining the images associated with each case and identifying the earliest and latest dates referenced. In addition, the date of death of the individuals associated with each case is being identified when possible. This information is being added to metadata for each case on the Portal web site.

This effort was initiated in January, 2016. At the end of August, work on 1340 of the 3100 cases had been completed. In performing this effort volunteers logged more than 313 hours of time.

McGowan Funeral Home Records

The McGowan funeral home operated in South Dallas from 1955 until the 1990's.

The Dallas Public Library holds the collection of records from the McGowan home. It is currently housed on the 8th floor in the administrative area and is not accessible to the general public without prior arrangement. It contains client/deceased files which may include obituaries, photographs, funeral pamphlets, death certificates, and related materials. A small portion of the collection pertains to the administrative/office functions of running the funeral home, which held city, county, and VA contracts for local ambulances serving several nearby counties. This collection is a great resource for African-American burial practices in the late twentieth century.

Members of the African American Genealogical Interest Group have been creating a digital index of these records. A database containing information from the records that have been indexed so far (2,424) has been made available on the Society website. This database will be updated as additional records are indexed.

Cemetery Tombstone Photography & Indexing

Volunteers photographed and indexed tombstones at the Pleasant Mound and the Agudas Achim Cemeteries using the BillionGraves cloud application on April 22 and 23, 2016. In addition, DGS members Suzan Younger, Barbara Ware and Kathleen Murray digitized burial records for the Pleasant Mound cemetery and will provide cemetery management personnel with a spreadsheet-based tool to view the images.

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Society Records

This year saw the completion of the 1st phase of an effort to make digital images from all past Newsletters, Journals and Quarterlies available on the the website. Some of the available images are of low quality and will be re-scanned and updated in the next phase of this effort.

Cemetery Database

Under the leadership of Barbara Ware, Suzan Younger and other members we have continued our tradition of publishing cemetery records by maintaining our database of Dallas County burials. Our focus is on historical cemeteries, and our methodology insures that all burials, not just those with tombstones, are recorded. The 36,414 records in our database are freely accessible to the public.

To assist and support the Genealogy Section of the J. Erik Jonsson Central Library in Dallas, Texas

Book Scanner

The Dallas Genealogical Society has a well established history of providing support for the Genealogy Section of the J. Erik Jonsson Central Library. This was clearly articulated during our 60th anniversary celebration in May when it was revealed that the Society has been responsible for donations in excess of \$500,000 over its 60 year history.

Included in this total were funds from our 2014 - 2015 budget used to purchase a high quality Zeta Book Scanner (and a 5 year maintenance contract). It was placed into service and made available to all patrons of the 8th floor Genealogy section of the library in September, 2015.

Volunteer Desk

DGS members, and other volunteers, staff the volunteer desk on the 8th floor in the genealogy section, providing guidance and assistance to patrons.

Administration

Bylaws Update

The organization's bylaws were updated (approved at the April 2, 2016 general meeting) to allow the Quorum to be tied to the membership level (instead of being a static number) and to allow for electronic balloting for the election of officers.

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Membership

Society membership has been on a historical decline, and indeed it continued to decline through December, 2015. However, A number of initiatives aimed at increasing membership and awareness about the organization were undertaken during this period:

- Increasing membership was identified as one of the key board priorities.
- The membership level was a line item that was reviewed and discussed at every board meeting.
- Vice President Kathleen Murray made increasing volunteer participation a key priority for each seminar.
- The society was represented by volunteers who staffed a table at the 2015 Texas State Genealogical Society conference held in October, 2015 in Austin.
- The society paid to have an exhibitor's table at the North Texas Irish Festival held March 4 - 6, 2016 in advance of the Spring Seminar. Members staffed the table throughout the weekend and reported a high level of interest from the attendees, 80 of whom added their email addresses to the DGS mailing list.
- We initiated a "Bring a Friend to a general meeting" campaign that netted several new members..
- A letter was sent to lapsed members encouraging them to renew their memberships.
- Volunteers also set up and staffed a table at the Federation of Genealogical Society annual conference held August 31 - Sept 3 in Springfield, Illinois.

The combined results of of these (and other) activities have been positive. The overall membership showed a net 3.9% increase during this period:

- 461 - Sept (2015)
- 459 - Oct
- 452 - Nov
- 449 - Dec
- 450 - Jan (2016)
- 457 - Feb
- 478 - Mar
- 478 - Apr
- 474 - May
- 476 - Jun
- 482 - Jul
- 479 - Aug

The breakdown of membership types as of September 28, 2016 (at which time membership had increased to 484) was as follows:

Category	Count
Standard: individual	243
Standard: Household	54

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Associate	42
Life: under 65	3
Life: over 65	96
Honorary Life Member	1
Library	7
Exchange (Society)	38
Total:	484

Marketing

Led by Kathleen Murray in her position as Vice President with its focus on Seminars, the Society has undertaken steps to significantly increase our effectiveness in the Social Media arena. Campaigns were laid out for each seminar, outlining when each outlet (eNews, FaceBook, Twitter and our own website and Blog) would be used and the focus of the content to be provided. DGS member Ken Johnston provided significant time and skill to improve our marketing literature. Director of Publicity Carolyn Davis, webmaster Todd DeDecker, IT Administrator Barbara Ware and Director of Printing & Distribution Harmon Adair also made significant contributions of time and effort.

The end result has been a significant improvement in the quality and appearance of all of our printed marketing and social media publications.

Newsletter

This year marks the completion of our multi-year migration towards an online newsletter. The eBlast, which started as an adjunct electronic communications tool in 2010, was renamed eNews in February of 2016 and is now the official newsletter of the Dallas Genealogical Society. Carolyn Davis, our Director of Publicity, who was creating the eBlast, has continued in that role for the eNews.

Sales

Under the leadership of Jimmy Walters, the sale of items by the society has increased significantly. This has been due to the introduction of new items, including logoed hats, T-Shirts and Polo Shirts.

Corporate Contributions

DGS members have had the ability to designate the Society as a recipient of a 1% match from the Tom Thumb grocery store for several years now.

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This year the Society joined an identical program offered by the Kroger grocery chain. A similar arrangement with Amazon (through their Amazon Smile program) that allows members to direct a 0.5% match for purchases made to be directed to the society was also established late in the year.

Income from these three sources was about \$560 during this period.

Grants Received

The society received another "Rescuing Texas History" grant from The Portal to Texas History valued at \$104.70 in August of 2016. The grant has enabled us to place the 2013 and 2014 issues of *Pegasus, the Journal of the Dallas Genealogical Society* on The Portal to Texas History. A similar grant in 2015 allowed us to complete collection of the 1995 - 2012 edition of the *Journal*.

Website Updates

The website underwent a major upgrade in 2015, migrating from a Joomla to Wordpress. The new website was activated in late August, 2015, but continued to receive enhancements in the ensuing months. Former Webmaster Tony Hanson and new Webmaster Todd DeDecker spent a great deal of time making a seamless transition that resulted in a website that, as noted elsewhere in this document, was recognized with a 1st place finish in the 2015 Texas State Genealogical Society Website competition.

The website enhancement introduced a valuable new Volunteer tool that has been utilized with great success this year. It has been used to solicit and register volunteers who have stepped up to help produce our highly successful seminars. It has also made it possible to engage members in indexing activities.

Awards Received

We continue to support, and benefit from, our membership in the Texas State Genealogical Society. We were an exhibitor at the 2015 annual conference held in November in Austin. In addition, we were honored to receive the following recognition from the TSGS:

- 1st Place in the annual 'Website for a Partner Society' competition
- Tony Hanson was recognized as the Volunteer of the Year for his contributions to the society and to the genealogical community in his capacity as Webmaster and Director of Education.

Insurance

The Society maintains two insurance policies, both obtained through the Nonprofits Insurance Alliance Group:

- Directors and Officers coverage
- General Liability coverage

Organizational Improvements

Google For Nonprofits

During this period the Board of Directors began to utilize the Google for Nonprofits suite of tools. This includes Google eMail accounts for each officer, which will insure that copies of email sent by and received by each officer will be available for the next person to hold that office.

It also provides private (for each officer and SIG leader) and shared file storage capabilities. The shared file space has been utilized to create a centralized repository for society documents and photographs related to society events. As these files are associated with the Google email accounts, they are available to present officers and will be available to future office holders.

The applications available in this environment have already altered the way in which society officers interact in the creation of documents and presentations, as they facilitate the incorporation of more collaboration into the process.

The availability of a centralized, and universally accessible online repository has also enabled society leaders to establish an orderly and organized collection of digitally formatted documents, records and images associated with the history of our society. This will also serve as a platform for the ongoing collection of digitally born materials for the foreseeable future.

Password Management

Password management was enhanced by the adoption of the Lastpass cloud-based password management tool which replaced a spreadsheet that had been used for this purpose. Key officers have access to this environment, which is used to maintain UserID and Password information for all of the online services utilized by the society.

GuideStar Gold Designation

The information about the society maintained on the GuideStar website was updated, allowing the society to receive their GuideStar Gold designation signifying our commitment to transparency.

Infrastructure

The Society continued its use of a variety of free and fee based technological tools and resources to provide information and services to our members.

Neon

Neon is a fee based commercial service offering from Z2 Systems that provides a wide range of services for not-for-profit organizations like the Dallas Genealogical Society. It is a stand-alone application that is used to provide the following services:

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- Member Account management
- Seminar and Special Event Registration
- Credit Card management
- Sales of DGS products

Vertical Response

This is a service used to create and distribute email messages and our eNews publication to DGS members. These services are provided at no cost to nonprofit organizations like the Dallas Genealogical Society.

Web Hosting

The Dallas Genealogical Society utilizes two fee based web hosting services. One supports our production website and the other is used for testing and development. In addition, a fee based commercial cloud based service is used to archive our collection of digital images.

Our website is now based on the widely used Wordpress platform.

Voicemail

Kall8, a fee based commercial service, is used to manage our voicemail services. This service digitally records calls made to the society and sends them as conventional email.

Online Meetings

The Society maintains an annual subscription to GoToMeeting which is utilized by officers and SIG leaders for society purposes.

Other Social Media

The society also makes use of Facebook, Twitter, YouTube, Dropbox, Hootsuite, and Google Analytics.

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Finances

The laptop PC utilized by the treasurer was replaced as the previous system had reached the end of its useful life. A current version of the Quickbooks software was also purchased at the same time. The services of a certified Quickbooks auditor were utilized to migrate our financial information into the new environment.

We also chose to incur a one time write-off of \$3,578.98 to eliminate a discrepancy between credit card charges as reported by Neon and the same charges reported by iATS. This write-off allowed us to accurately reconcile the iATS account against bank deposits. It describes a reporting error in Neon, and does not refer to real income.

Over the course of the fiscal year, the Society had a total income of \$40,919.30 and expenses of \$32,269.69, resulting in a net income of \$8,649.61.

We began this period with cash assets in the amount of \$148,782.96: \$27,058.45 in a checking account and \$121,724.51 in a savings account (as reported at the October 3, 2015 general meeting).

We ended this period with cash assets in the amount of \$158,191.22: \$36,376.59 in a checking account and \$121,814.63 in a savings account (as reported at the October 1, 2016 general meeting).

For this period, net income for the society was primarily derived from membership dues and profits from our seminars:

- Membership dues (51%)
- Seminar (46%)
- Reward cards (2%)
- Other (1%)

The leading expenses were costs associated with seminars, creating Pegasus and publicity:

- Seminars (48.8%)
- Pegasus (14.9%)
- Publicity (9.8%)
- Information Technology (7.3%)
- Insurance (4.3%)
- Credit Card Fees (3.9%)
- Awards Banquet (3.5%)
- Postage (2.2%)
- Other (5.3%)