



# Society Strategies

Federation of Genealogical Societies

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Series Set I Number 12

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## Set I Strategies for Societies

### Is There an Office in Your Society's Future?

by David E. Rencher, AG

## Supplemental Page

This strategy paper, written some years ago, is an FGS *Classic* that contains ideas and strategies still relevant today in society management.

This paper describes in detail what it takes to set up an office, including a very detailed materials checklist. A useful paper for societies considering taking the office out of the garage and into its own space.

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## Is There an Office in Your Society's Future?

by David E. Rencher, AG

### INTRODUCTION

Whether your society is large or small, all groups are faced with the question of when to take the plunge and establish a "permanent home" or centralized office. Is your society ready? What will it take to maintain such a facility? Can it be shared with others who have similar needs? There are probably as many answers to these questions as there are societies and situations. This paper will answer some of the questions as to requirements for planning an office and will warn of a few pitfalls to avoid.

First, deal with the obvious questions. Why does your society need a centralized office? Is it to be a "storage facility" or a working office? Will it be staffed full or part time? Can you find a location convenient to the officers and board? Do you need meeting space in or near the facility?

### PLANNING FOR NEEDED SPACE

How much space is needed for your ongoing operations? Is someone going to be there all the time or are you first establishing only a central storage facility? If your society is like many, the society materials are scattered throughout the city, county, or state in various basements and garages. "Oh, I think so and so has that in her home." Does anyone really know? The first task is to determine how much "stuff" the society owns and should bring together into a centralized location. Be prepared. The amount may surprise you! If yours is like most societies, you have back issues of periodicals and newsletters, other society publications, extra copies of various seminar syllabi, letterhead stationery, envelopes, past correspondence and reports, treasurers' receipts, membership brochures, and various office supplies. Your society may even have accumulated various pieces of office equipment over the years. You will need a complete inventory of this material. If your society

is also thinking about establishing a library with the central office, then there is much more work to be done. {See "Libraries, Leases and Landlords," FGS FORUM 7:1 (Spring 1995)}.

### **LOCATION**

Is the space you are considering for an office convenient to those who must use the facility? If it is presently, will it be in the future after changes in the officers and board? In other words, is it centrally located to the population you serve and will draw from for staffing? Is it located near the facilities you will need most often such as a post office box, office supply store, copy center, bulk mail center?

### **FINANCING**

How much does it cost to run an office? Rental costs for the space alone will vary depending on the area in which you live. It is not unusual to pay \$200-\$800+ per month (\$2,400-\$9,600+ annually) for office space. Additional costs will include telephone and other utilities, if they are not included in basic rental charges. Telephone costs for business lines average \$30 per month plus any long distance service needed. Try to find an office where some utilities are included as part of the rent to keep monthly costs consistent.

### **SECURITY**

Often when the finances of the society are pitted against the location, security is the sacrifice. Obviously, the less expensive spaces to rent are in the less desirable areas of the community. For the safety of those who must use the facility on a daily or weekly basis, make security part of site evaluation. An unfortunate incident will obviously have a very detrimental effect on the individual involved and will become a factor in recruiting those willing to work or meet at the

site for society business.

Since your society may be investing a considerable amount of funds in obtaining office equipment and furniture, you have a responsibility to the members of the society to see that the office is in an area that is relatively free from theft and vandalism. Computers, in particular, are big targets for theft. Contact your local law enforcement agency and ask for a record of crimes that were committed in the neighborhood during the last year.

Even in the better communities, be sure that entrance and parking lot lighting is adequate. Are doors and windows well secured? Determine if the facility provides a security guard and learn the hours the guard is available.

Is flooding a problem? These details can be learned by checking with the City Planning and Zoning Commission.

Lastly, who gets keys? It is better to decide this question early. Too many keys floating around may lead to items being difficult to account for later.

### **INSURANCE**

Once you have established the office, be sure that the equipment and/or facility is insured against fire, theft and damage. It is a small price to pay to protect a very large investment. Factor this into your annual costs of creating the permanent office. If the office is in an existing home, a homeowner's policy may have a "rider" that includes the additional coverage. Often an additional \$5,000 coverage will cost less than \$30.00 per year.

### **STORAGE**

Your society may in fact need only a very small

office with some off-site storage. If you have a number of materials needed on just rare occasions, then consider a smaller office facility and a cheaper storage facility. Developed office space is very expensive "storage space."

## STAFF

Will there be someone present in the office during working hours or several days each week? Is this a volunteer or a paid employee? Investigate the compensation laws for your state/country and learn what constitutes a full or part-time employee. Watch the issue of coverage for health care and other benefits. Many organizations that have not had to provide these kinds of benefits in the past, may have to in the near future.

## SHARING SPACE

Opportunities to share space with others of similar interests may be available. While these arrangements can sometimes be risky and involved, they may be an option for your particular needs. Are there professional genealogists in the area that may want office space outside their homes? Are they in a position to share in the costs of the rent and the salary for a receptionist to answer the telephone? Can the receptionist, or office partner, pick up the mail, log it on a transmittal and forward it to the appropriate officers and board members? Be creative in looking for alternatives. Also, it never hurts to advertise your need for space in the newsletter. Sometimes there are people looking for something to do with a piece of property that is a burden to them and yet they aren't ready to sell.

## MISCELLANEOUS

If your society does a considerable amount of mailing, you may want to obtain a postage meter

and scales. These can be rented for a monthly fee. You may also look at renting a photocopy machine and/or fax machine. While it would be nice to purchase these items, the cost may be prohibitive in the beginning.

## CONCLUSION

It is time to make the pitch to the Board! The best approach is to be prepared and do your homework. Put together a written proposal and mail it in advance of the board meeting. Spell out the facts and figures in detail. Provide a checklist of items often needed in an office. See the following list for suggestions. Go to an office supply or office furniture store and obtain prices and quotes. Get as much information as you can. The board cannot make an educated decision without the facts.

Next, factor in the costs to run the office with your present annual budget. The treasurer of your organization should be able to provide you with this information. If you need to increase revenues to handle the added costs of the office, you should lay the foundation for increasing memberships or sales. Be realistic! It is human nature when trying to sell an idea to understate the risks and liabilities and overstate the possibilities and benefits. Take care to present a balanced assessment.

Whatever your society decides, go into this decision with your eyes open! Make the decision cautiously, but firmly. It will take commitment on the part of your officers and board and will likely be the most significant step your organization has taken to date.

## **OFFICE MATERIALS CHECKLIST**

### **Furniture**

Secretarial Desk  
Secretarial Chair  
Credenza  
Floor mat  
Desktop organizer  
Coat rack  
File Cabinet(s)  
White board  
Folding tables  
Side chairs  
Storage shelving  
Wall decorations  
Hanging folder frames

### **Equipment**

Calculator  
Clock/radio  
Postal Scales  
Postage Meter  
Telephone  
Typewriter  
Answering machine  
Vacuum cleaner  
Fax machine  
Photocopier

### **Computer Equipment**

Computer  
Printers  
Fax/modem  
Software:  
Operating system(s)  
Word processing  
Data base management

### **Operating Supplies**

Computer Diskette tray  
Sponge moisteners  
Computer Diskettes (3 1/2, 5 1/4)  
Scissors  
Date Stamps

Ruler  
Dictionary  
Book ends, pair  
Drawer organizer  
Waste paper basket  
Exacto knife  
Three-hole punch  
Hanging File folders  
Tape dispenser w/post-it tray  
In/Out baskets  
Stationery systemizer  
Letter opener  
Stapler and Staple remover  
Paper trimmer  
Stamps – assorted  
Pencil Holder  
Stamp Rack  
Pencil sharpener  
Single-hole punch  
Rolodex file

### **Consumable Supplies**

Computer labels  
Computer Paper  
Desk Calendar  
Dry-erase markers  
Dust cloths  
Filament tape  
Furniture polish  
Glue stick  
Highlight markers  
Legal pads  
Liquid paper  
Paper clips  
Pens, pencils  
Post-it notes  
Rubber bands  
Rubber cement  
Sealing tape  
Stamp pad ink  
Telephone log book  
Message pad  
Stationery supplies  
Staples