



# Society Strategies

**Federation of Genealogical Societies**

**P.O. Box 200940 Austin TX 78720-0940**

---

Series Set I Number 11

Rev. February 2000

## Set I Strategies for Societies Long Range Planning

by Gary Mokotoff, David E. Rencher, James W. Warren, Curt B. Witcher

# 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 discusses the fundamentals of long range planning, elements of the plan, formulating the organizational mission statement, considering future growth, improvement of your organizations' services, surveying member skills within the organization, identifying qualified individuals for specific tasks, and the financial considerations of a society.

The information on page 4 which directs the interested person on how to obtain copies of this paper is incorrect. The FGS office no longer reprints the SSS papers, and has phased out paper copies of the SSS papers altogether.

There is no charge for any of the SSS papers and no limit to the number of copies you may download.

You may obtain SSS papers via download from [www.fgs.org](http://www.fgs.org)



# Society Strategies

FEDERATION OF GENEALOGICAL SOCIETIES

P.O. BOX 200940 • AUSTIN, TX 78720-0940

Series Set I Number 11

Rev. February 2000

The FGS Society Strategies Series© consists of papers which offer suggestions and instructions for innovative and effective management for genealogical and historical societies. The Federation holds a copyright to this material. A list of sets and ordering information appears at the end.

## Set I Strategies for Societies

### Long Range Planning

by Gary Mokotoff, David E. Rencher,  
James W. Warren, Curt B. Witcher

#### INTRODUCTION

Too often long-range planning is the result of some immediate crisis that should have been anticipated. Society officers take the attitude "if we had only done some long-range planning the problem wouldn't exist today." In truth, long-range planning should be part of every organization's functions. It not only can help anticipate problems before they happen, but can accelerate the growth of the organization.

What is long-range planning? Long-range planning concerns itself with evaluating where your organization is today, setting goals as to where it wants to be at some target date in the future and how it will achieve these goals. The date in the future will vary; it may be two years or five years from now. The functions to be evaluated will vary. An organization with steady, acceptable membership growth may have no long-term plan on membership growth (other than its current plan) but may concentrate on how to accommodate its growing membership in terms of services, meeting space, etc.

Long-range planning must be much more than an informal discussion about what the society ought to be doing in the years ahead. Good planning has to follow a very orderly and formal process.

#### ELEMENTS OF A LONG-RANGE PLAN

A long-range plan is much more than a statement of the philosophies of the organization and how it should operate. The plan should be:

**Truly long-range.** Planning for next year is not long-range.

A plan should include a number of years in the future. The goals should be broad enough and visionary enough that they will take some time to complete.

**Flexible.** It is a common misconception that a long-range plan, once written, is locked into place and not changed. It should, in fact, be flexible and changeable.

**Accountable.** Each goal should be measurable so that it can be determined if it was achieved. Each goal should have objectives or action plans that will be specific, time-limited and spell out a responsible party for completion of the objectives or actions described.

**Visionary.** Long-range planning means thinking big. A plan without vision is worse than no plan at all. Forget considerations such as budget constraints, for at least a little while, and dream about what your society could be/should be. Vision and progress always requires some risk, but you *an't* steal second with your foot on first.

#### MISSION STATEMENT

The mission statement is the first step in long-range planning. A society must have a mission that is in writing, stating clearly the reason the society exists and the vision that the organization holds for the future. It is a clear statement of where the society wants to go.

After writing the mission statement, take a hard look at where the society is now. This self-examination should look at the strengths and weaknesses of the society, opportunities for the society, and threats to continued operation of the society. This self-

# Long-Range Planning

examination should also look at the external influences that impact the society.

When there is a clear picture of where the society is now, write the goals. Goals will grow from the results of self-examination. Goals should take advantage of opportunities, build on strengths, correct weaknesses, and prepare for threats to the society.

A good plan will limit the number of goals to a handful. If five to ten good goals are written each year, there will be enough to do. Remember, planning is an ongoing process and items will be continually added to the plan.

To carry the goals into action, some person or group of persons must be assigned the responsibility for each goal. These action groups will then be responsible for writing strategies to make the goal happen.

Many aspects of a society's organization should be evaluated for a long-term plan. Shown below are categories that might be considered. They cover the major functional areas of an organization. There may be others that are peculiar to your organization. The methods of achieving the plan shown here are not complete, but given merely as idea generators.

## MEMBERSHIP—HOW TO GROW

**Publicity:** How can we make the public more aware of our existence? Do we make the news media aware of our regular meetings and special events? Can we get a special article about our organization placed in a local publication? Do we offer to speak about genealogy to local groups?

**Beginners Workshop:** This is a great method of increasing membership. Many people want to get involved in tracing their family history but don't know how. Some have tried and feel they have gone as far as they can go. A Beginners Workshop will attract these people and if you demonstrate to them that it is possible for them to trace their family history, there is a good chance they will join your society.

**How to Retain Members:** Does your organization have, in your opinion, a large dropout percentage? How can you retain the members you already have? What are the advantages to being a member of your society? Are your members aware of these benefits? Are you teaching them the skills for them to advance their research? Is there an adequate social side to membership in your society? Do you have a newsletter that helps your membership in their genealogical research? Do you adequately permit involvement of your members in the running of your organization?

## SERVICES

**How to Improve Meetings:** Members should look forward to

meetings with anticipation and excitement. The meetings should be well planned and substantive. Typically, the person conducting the meeting should be out-going, personable and well organized. If your president normally conducts the meetings, but is not this type of person, consider calling an appropriate person to conduct meetings. Be aware of visiting speakers to your area. If there are speakers you would like to hear from, but cannot afford to pay their entire expenses, send them an invitation to speak at your meetings when they are coming to your area. Speakers from areas outside the U.S. often fund their trips to the U.S. or Canada by combining a number of invitations.

**Publications:** Do your publications fit the needs of members, or have they "drifted" away from the original objectives of the organization because material to publish was difficult to obtain? Do you handle time-sensitive material versus genealogical articles of lasting value? Does your society publish both a newsletter and a journal? How often? Does your society publish research aids for your area of interest or specialty?

**Seminars and Workshops:** Does your society sponsor an annual or regular seminar or workshop? If so, has it been profitable? Do you plan a realistic "break-even budget" and hope for more attendees? What is necessary and what is nice to have? Are your members tired of hearing the same speakers all of the time? What are the resources for learning about new speakers? Advertise, advertise, advertise—what does it take to "fill the barn?"

**Accommodation Exchanges:** Does your society offer an accommodation exchange service? How does it work—what are the member benefits?

## FACILITIES

**Meeting:** What works for your society's meeting location? What will change if your society grows, or your present facility becomes unavailable? Does your society own or rent its meeting space, or have an arrangement for donated space? How do you provide the balance between adequate room, appropriate speaker and attendee comfort, and controlling cost? Are you reviewing how to best provide handicapped access, and how the new Americans With Disabilities Act might expand those requirements? How might you change your meetings if you don't have options to change your meeting place? What approaches are other societies using as their membership, their meeting space needs, and the realities of the marketplace change?

**Office:** How does your society handle its clerical, administrative, and storage functions? What lies ahead? Are the garages of volunteers filled with newsletter and quarterly back issues? Are board meetings outgrowing living rooms, and other activities expanding? When is the right time to have an office? What problems can an office solve, and what headaches can

## Long-Range Planning

it create if long-term planning is not adequate? What important pluses and minuses should be considered in starting an office, and expanding or moving as the society grows?

**Library:** A society library can be a tremendous benefit to your members, and a strong tool for drawing new members and support for the society. How can you manage it and make it sensibly accessible? What should your society think about before starting a library collection? Is your society able to raise the regular volunteer help, the insurance premiums, and the cataloguing and security system, however basic, that is needed? What is the future of genealogical society libraries in the age of computerized information? What cooperative joint ventures might work in placing your collection in an existing library?

**Integrating your Facilities:** Has your society considered how it might meet its long term needs for meeting, office and library space all in one location? Have you considered joining forces with other non-profits or small businesses? Are you looking down the road at where you, and other organizations, may be headed in common directions, and could combine some facilities?

### FINANCES

Is the lack of finances preventing your society from providing the services and doing the projects it wishes to accomplish?

**Dues Structure:** Dues income should cover the day-to-day operations of your organization. At the end of the year, ignoring the expenses that were designed to make your society grow, charitable contributions, and other non-operating expenses, your financial statement should show a break-even status. If not, you should consider increasing your dues.

**Additional Revenue from Existing Projects:** Do you have current programs that can generate (additional) revenue? Quite often the cost to members or outsiders of a program is determined "to cover costs." Is it possible to charge more for an existing project, without impacting the number of people who benefit from the project, and consequently generate revenue to fund new projects? For example, a beginners workshop budgeted to break even can be a revenue generator for other projects if you can charge more but attract the same number of people. A trip to a special facility, for which you must charge to cover costs, can create additional revenue. Charging only \$5 or \$10 above cost should not impact attendance.

**Project Proposals:** Is it possible to get funding from outside your organization? Are there planned projects of interest to other groups, foundations or government agencies that would be willing to help finance the project? Warning: foundations and government agencies quite often have a strict formal procedure to ask for grants. If you are not familiar with the

process or cannot find someone to help you, the likelihood of getting funds in this manner is very low.

**Publishing:** Have you considered publishing a book? The least expensive part of publishing is the printing. A genealogy book that sells for \$20 costs, typically, \$2–3. Publishers are not millionaires. They have expenses that eat up their profits; the most significant being payroll. But your organization has no payroll; it relies on volunteers to do the work increasing the likelihood your society can make a profit from a published book.

### LEADERSHIP

**Nominating Committee:** Most long-term society successes and problems can be traced to the work of the nominating committee. Successful nominating committees accurately define the job requirements, responsibilities, and time commitments. They then recruit individuals who will commit their specifically needed skills and talents on behalf of the society. They provide potential officers and board members with written job descriptions, operating procedures, and scheduled meeting dates, so that members can realistically commit to the job to be done. How do you get beyond "looking for warm bodies" for this year's ballot? How can you make your nominating process the beginning of long-term success for your society?

**Survey of Membership Skills:** Genealogists often get to know one another's ancestors better than they get to know one another. Do you know your members? The membership of most societies represents a wide range of occupations, interests, and experiences. What ways work for learning of the skills and interests of your members that might benefit the society in small or large ways? How do societies tap the talents of their membership to take them successfully into new projects or help solve old and growing problems?

**Board and Committee Meetings:** Society meetings can accomplish the business of the society, and still be enjoyable gatherings of genealogists. Over the long term, meetings that follow a detailed agenda, provided in advance, will be better-attended by better-prepared individuals who participate, rather than occupy a chair. What makes meetings work? Do they start and end on time? Does the presiding officer preside, and ensure discussion is open but reasonably controlled? Is the focus on finding ways to keep the work of the society moving forward?

**Leadership:** Few societies simply grow and blossom unaided. If you have served as a society leader, you probably know that most must be led, sometimes dragged—kicking and screaming—in order to succeed or even to survive. Some fundamentals are critical to both short and long term planning for societies. With responsibility comes accountability. Do

## Long-Range Planning

your board members recognize that they are legally responsible for the actions of the society? Do you establish goals with some sort of measurable results? Do your board and society members participate in open discussions of proposals and problems, then support and work on behalf of the resulting group decisions? Is your society leadership networking, within the society, within the community, and within the greater genealogical community? Your society's future lies in all those circles.



### CONCLUSION

Successful societies are constantly formulating long-range plans and making them come to pass. They have the flexibility to refine their approach when necessary and stay the course as needed. The key to managing the well-run society continues to be the people selected to run the board. The Federation of Genealogical Societies provides a number of materials to assist the individual society. The FGS Society Strategy Papers are concise presentations of issues relating to societies and

their officers. These papers offer suggestions, helps and resources to better manage your society. They are available through the FGS Business Office, P.O. Box 200940, Austin, TX 78720-0940.

In addition, a major component of recent FGS conferences has been the Society Management Seminar. This all-day event precedes the main conference and focuses on the needs of managing a local society. Previous lectures delivered at these meetings are available on audio tape through Repeat Performance, 2911 Crabapple Lane, Hobart, IN 46342. <<http://www.audiotape.com>> or Phone: (219) 477-5492.

### REFERENCE

Strategic Planning is another term for Long-Range Planning. For specific instructions on planning, see "Establishing the Organization's Direction," Chapter 1 *The Complete Guide to Nonprofit Management* by Smith, Bucklin & Associates (New York: John Wiley & Sons, Inc., 1994).

Topics include key elements to successful planning, identifying a facilitator, conducting a planning session, formulating a mission statement, and implementing and monitoring the plan. This book is available from FGS-Publications. See ordering instructions, below.

### *FGS SOCIETY STRATEGIES SERIES*

- SET I. STRATEGIES FOR SOCIETIES*
- SET II. STRATEGIES FOR PRESIDENTS*
- SET III. STRATEGIES FOR VICE-PRESIDENTS*
- SET IV. STRATEGIES FOR TREASURERS*
- SET V. STRATEGIES FOR SECRETARIES*
- SET VI. STRATEGIES FOR PROGRAM CHAIRPERSONS*

*Shop at our online store <<http://www.fgs.org>> or for a list of titles and a price sheet, send your name and address to: FGS-Publications, P.O. Box 200940, Austin, TX 78720-0940.*