



Society Strategies

Federation of Genealogical Societies

P.O. Box 200940 Austin TX 78720-0940

Series Set I Number 18

January 2000

Set I Strategies for Societies

Creating a Member Handbook

by Robert Frelinger

Supplemental Page

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

A member handbook, ready to hand out to new and longtime members, conveys information about the society's purpose, projects, programs, and plans. Preparing the handbook is the topic of this paper.

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Set I Strategies for Societies Creating a Member Handbook

by Robert Frelinger

INTRODUCTION

Your society has a story to tell about its purpose, projects, programs, and plans. The story is best told through a *Member Handbook* given to all new members and prospective members who express serious interest. Explaining the “Why and How” of such a handbook is the purpose of this paper.

WHY PREPARE A HANDBOOK?

The preparation of a member handbook benefits the reader and the society. A handbook educates new members about how your society works and can motivate prospective members to join. In short, it can “sell” your society while encouraging participation. It is easier to be involved in an organization when you understand its goals and activities.

WHAT SHOULD BE INCLUDED?

Keep the writing focused on your purpose and the audience. Explain why the organization was formed, what activities are being done, and why and how others can help. The audience is anyone who does not already know these things. Some topics to include:

- **Welcome.** A welcome letter from the group’s leadership sets the tone for the rest of the booklet. The letter also lets readers know, in general terms, what they can expect from the booklet.
- **Officers.** List positions and contact details.
- **Mission & Goals.** A compelling mission statement and clearly stated goals belong here. Both should be focused enough that people could see there is little duplication with other organizations. Spell them out in specific terms.

A mission statement might be: *“To make sound genealogical research methods and sources interesting and accessible to everyone with a connection to our county.”*

A goal might be: *“To locate, catalog, and preserve genealogical sources of this county.”*

- **Accomplishments.** People want to associate with successful organizations, but they won't know how productive your organization has been unless you tell them. Here's your chance to brag a bit. You need not repeat what you have in other sections of the booklet – just pick out the highlights:

“Our library team provided over 2,500 hours of volunteer service in 1999.”

- **Organization.** Use a chart or descriptive text to explain how the group is organized. Identify which positions are elected and which are appointed. Provide the dates for elections and tell who does the appointments. Give a brief description of the general duties of each office or board position.
- **Financial Statement.** Members want to know their money is being used in the most effective ways. Is the money advancing programs directly related to the mission and goals? Or, are your programs prospering in spite of having very little financial support? The latter can say volumes about the level of commitment of your volunteers.
- **Membership Benefits.** It is human nature to want to know, “What's in it for me?!” Let readers know the great things you are doing just for members. Make them sound as attractive as they are. Perhaps your organization offers member discounts on

products or entry fees to workshops? Regular publications like a journal or news letter? Opportunities to submit free ads or queries? Or an annual, members-only social event, such as a picnic?

Think of your new or potential member as needing to choose between two genealogical societies. Tell them what makes your society unique. Point out the extra value it offers to members.

- **Programs or Projects.** Briefly describe research trips, indexing or data collection projects, or workshops your group conducts. Share the excitement and explain the value of these ventures and tell how members can assist.
- **Volunteer Opportunities.** Help readers see that what is good for your organization is also good for them. Explain your volunteer program. If there is a volunteer coordinator, list that person's name and contact information. Perhaps your organization offers a mentor program whereby previous officers answer questions and advise new officers. If so, give contact information for a person who is willing to discuss this in more detail.

In addition to making opportunities known, use this section to honor some outstanding volunteers:

“Our library team consists of dedicated volunteers like Mary Jones, who helped in the public library's genealogy section for more than 400 hours during the past year.”

- **Internet Resources.** Many people join a local society to get help in their research. They may have used the Internet, but that

doesn't mean they have researched properly. Listing and describing some of the better sites while adding a caution about on-line skepticism will be helpful.

- **Advertise Your Society's Home Page.** Tell readers they can locate other society Home Pages through Society Hall at <www.fgs.org> Society Hall (produced by the Federation of Genealogical Societies and Ancestry.com) is an on-line directory of genealogical and historical societies in the United States. Any society may choose to be listed. In addition, FGS members societies may provide detailed information on their products and services.
- **Relevant Organizations.** Tell readers about other regional, state, and national level organizations designed to help them. Every society should be a member of the Federation so FGS's purposes and member benefits should be stated. Include the addresses and Web sites for the Association of Professional Genealogists<www.apgen.com> and the Board for Certification of Genealogists <www.genealogy.org/~bcg> to help educate readers about genealogical services and products.
- **Standards.** A great way to help new genealogists get off on the right foot is to provide *Standards for Sound Genealogical Research* in the member handbook. These criteria for ethical and careful research are recommended by the National Genealogical Society, along with *Standards for Use of Technology in Genealogical Research and Standards for Use of Record Repositories and Libraries*.

The three guidelines are copyrighted by NGS and reprint and publication permission is given provided they are reproduced in

their entirety, including the copyright notice. They are available for reprint from the NGS Web site at www.ngsgenealogy.org.

- **Bylaws.** Publishing the bylaws in the booklet gives members a permanent reference and meets the requirements of some organizations to provide this to new members.

PRODUCTION

Most of us have access to a computer and a printer. Compile and type the information in a word processing program and do a preliminary printing of five or six copies.

Target some key people, such as your publication's editors or proofreaders, officers, members with publishing experience, and just as important, at least a couple of non-members who represent your target audience. Ask each of these folks to read for content, interest, accuracy, and completeness.

Comments from this team of readers will increase the professionalism and the value of the booklet. After incorporating the team ideas into the text, print a few copies to distribute to current board members. Board approval must be obtained before you print or distribute the handbook in quantity.

PRINTING

Try a printing utility which allows you to easily print your document in a booklet format. With the software installed for any printing jobs, the cost of printing the booklets becomes just the cost of paper, print cartridge or toner, and staples. Use one color of paper for your cover and another color for the pages.

Print only as many copies as you need for a

given period. For example, if you normally have no more than five new members a month, you might only print ten or fifteen for the two-to-three month supply. If you need more than twenty-five copies at a time, you may want to print a master copy and use a copy machine.

The information in the booklet stays up-to-date because you produce them only as needed. Include a header on each page that gives the name of the society, the title of the booklet, and the date of the “edition”. As new copies are produced, revise this date. This is important so that readers can identify the most recent version of the handbook.

DISTRIBUTION

Now that you’ve done all this work, how will you distribute the handbook?

- 1) Send it with responses to the serious inquiries you get regarding your organization. Include a membership application, too. If you don’t hear back within two weeks, send a follow-up notice.
- 2) Make it part of your new member welcome packet – and yes, there should be a new member welcome packet! This packet can include flyers about upcoming events, a volunteer application, a sheet with research tips for getting started, and maybe a listing of repositories in the local area: general holdings, addresses and contact numbers, and hours.

- 3) Provide a copy to current members. Some members may not be aware of all the organization’s programs. But even if they are, it is always good to reinforce the goals, objectives and accomplishments in a reference work they can keep close at hand. Encourage feedback from these members: they can help make this book an important asset to the society.

- 4) Use this booklet to make your society known to other agencies, organizations, and opinion leaders. If the booklet becomes too detailed for the audience you’re targeting, the project will not be in vain. It will give the in-depth information needed by your officers and public relations team.

ENJOY THE RESULTS

The process of collecting the information for your member handbook will trigger a close look at the organization. This may even result in some changes for the better. But most importantly, the Member Handbook will be your society’s ambassador, in the hands of people who need to know about the organization.

SAMPLE BOOKLET

The National Genealogical Society publishes “Passport to the Past: Guide to Membership Services.” Your society or one of its members may have a copy.