



Society Strategies

Federation of Genealogical Societies

P.O. Box 200940 Austin TX 78720-0940

Series Set I Number 20

Rev. February 2000

Set I Strategies for Societies

A Publication Strategy for Societies

by Karen Clifford

Supplemental Page

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

The details and considerations that determine how and when to publish society compilations is the subject of this paper. Whether paper or electronic, selecting a publisher and avoiding conflicts of interest are among the many components the publication committee must consider when preparing to place the society's name on a published work.

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



Society Strategies

FEDERATION OF GENEALOGICAL SOCIETIES

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

Series Set I Number 20

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 A Publication Strategy for Societies by Karen Clifford

INTRODUCTION

It was a very big project. Society membership has worked on indexing that major record group in your state for years. Now that it is finished, everyone has ideas on the best way to have it published. But which way is the best way to meet the needs of your society now and in the future?

Major projects trigger conflicting feelings among society members. Some folks are protective of the data so laboriously gathered and they oppose those anxious to "give away" the information. A few volunteers quietly hope for a "pat on the back" for a job well done while others are vocal about project proceeds benefiting this or that cause. Then a publications committee comes along and seems to take over the whole project.

Sensitivity to these feelings is a part of project planning. Other aspects include present and future society goals, finances, volunteer support services, and expertise.

This paper will provide ideas on how advance preparation can prevent future problems with major genealogy projects.

A PUBLICATIONS COMMITTEE

Considerations. Since one of the purposes of most genealogy societies is to share their findings with others, setting up a publications committee in advance of publishing is a good idea. In fact, a publications committee could help initiate projects by giving suggestions to the society or projects committee.

The first order of business, however, is to establish society publication guidelines based on society goals and objectives. These guidelines may need to be modified with individual projects, but would basically include: 1) financial considerations including reserves for the future; 2) society expertise; 3) traditional or electronic publication; 4) distribution rights to others; 5) editing or beta testing; 6) packaging; 7) sales and marketing; and 8) dealing with proposals and bids.

Structure. Good people to have on a publications committee include a member of your 1) publicity committee; 2) projects committee; 3) finance committee; 4) volunteer committee; and 5) executive committee. Also include those who have expertise in dealing with

A Publication Strategy for Societies

publishers, printers, electronic databases, and marketing.

REVIEW SOCIETY OBJECTIVES

Review society objectives and/or policies regarding both publishing and profit objectives. Do you have nonprofit status based on the premise that one of your objectives is to gather and share information as a public benefit? If you do, this does not mean that you cannot make money on this project. This is particularly true if your goal is to use that money to start or fund another project. There will be members in your society who do not understand the need to put away capital for future projects. Be prepared to explain future ideas and the amount of necessary financial reserves.

The profit incentive is just one of several hurdles to be crossed. Other considerations involve the information and how it is to be shared:

Get Information Out Quickly and to the Most People. If the goal of the society is to get the information out quickly to the most people possible in order to raise funds to buy a computer, how will that be accomplished? Is this project of value to only your local county? Or could it be potentially valuable to researchers in the whole state? Will only one vendor or one mode of distribution be allowed? For example, is the idea to limit the distribution of this publication to mail order only? Or could several methods be used for marketing the product, i.e., a society web page on the Internet, booths at conferences, advertising in national genealogy magazines? Will only the local society market the publication or will rights be given to others?

Distribution Rights to Others. If the goal is to make the data available to the most people possible, but society funds are low for publishing the information, a publisher or vendor might be considered. Should that publisher be a traditional one who publishes in documentation format or an electronic publisher? Would the society benefit by giving a publisher exclusive rights to the

materials? The biggest publisher or vendor today might have the biggest market, but if they had the sole distribution rights, it could limit the total distribution of the product over a long period of time.

Is the society interested in getting their particular information out to the most people promptly because the information is time sensitive (such as member lineage materials which, due to address changes of contributors, could be outdated quickly)? This might determine both the mode and method of publication.

Transfer of Rights. What happens to your data if the company originally contracted with goes out of business? Does the contract allow you to retain the rights? Or is the data transferred to a company that purchases the previous business? If transferred, will deadlines in the original contract be met?

What happens in the event of a delay in publication? For example, if your society has accepted pre-publication funds and the actual publication date will now exceed the time in which you can legally retain the funds without providing a product, who pays for the postage and expense of notifying or refunding the purchasers--the new publisher or the society?

Financial Concerns. Can you raise enough money from this project to fund the next project? How quickly do you need those funds? Is there a chance to reach many more people by going to an outside publisher versus doing the publishing in-house? If major publishers turn the society project down because it does not have enough appeal for their market, can your society take on the project by itself? Will a pre-publication effort be necessary to allow sufficient funding for the overall printing?

SOCIETY INVOLVEMENT

Determine the society's ability and desire to market and sell the product before you commit them to the marketing role.

A Publication Strategy for Societies

Sales and Marketing Considerations.

Marketing and sales include pre-publication marketing, printing, filling orders, billing customers, keeping and reporting taxes, storage and retrieval of materials, packaging, delivery to the post office, following up on missing orders, and maintaining an inventory. Do you have specific individuals who would be willing to handle the roll of "storekeeper" for the society?

Alternatives. If the society is unable or unwilling to do any of the above, could these functions be contracted out? If so, determine the charge for doing so and add that to the cost of the product.

PUBLISHER CONCERNS

There are several questions to consider before contacting a publisher:

Are all Publishers Welcome? Will the project go to anyone who wants it, or will certain criteria be established by the society or by its committee over such decisions? For example, "We'll give our data base to anyone who will pay xxxxx and/or give royalties of xxxxx."

Electronic Publication Concerns. Can the publishing company's software work with the society data in its current format? If so, how does the company want the data delivered to them? What kind of effort is the electronic publisher willing to expend to get the data from the society? Ask the electronic publisher, on a project-by-project basis, to give the society a description of the functionality of the product.

Look into the search engine. Are there key word searches with variable search fields for Boolean searches (determined by the type of data you have)? Are you able to search on any field and any combination of fields?

Consider management of the project. Look at the longevity of the publishing company and its commitments to others. What are the projected delivery dates? Are there clauses which could be

added to encourage the publisher to produce on time?

Society Support. Those who provided the labor for the original project should be involved in its beta testing. They are already familiar with the data and know how it could benefit others. How many beta copies can the society have to test? How much input can the society have on its overall function?

Packaging with Other Products. Electronic publishing allows much more information to be placed on one product than in the past. Your project may not be big enough to fill the entire CD. Ask what percentage of the total product your material will consume and how does that translate into a price for royalties?

Packaging. Does the society have control over how the product is packaged and marketed? Does the society want to review advertising copy? Could inclusion of the society's logo on the product package be perceived as endorsement for the publishing company? Can the society obtain copies of the product at a wholesale price in order to market it themselves? Or does the society receive a certain number of free copies to market themselves? What will the prices be?

Review the Pricing Structure. Review the retail price, wholesale price, and the society's purchase price for resale. Will there also be a royalty provided? How often are royalties paid? Are there free copies for the people who did all the data extraction? Will free copies be provided to major libraries within your county, state, or nationally? Who pays for those copies?

CONFLICT OF INTEREST

What is conflict of interest within a society? We often try to get people to serve on our nonprofit boards because they have the talents which can benefit our society. But, we don't want to give the impression that someone receiving professional recognition or providing a good service at a fair price to our society is in anyway

A Publication Strategy for Societies

doing something improper. We need to ask ourselves if any member of the board could profit from the production of the data and how they would benefit: financially, career positioning, etc.

A conflict of interest occurs when someone receives tangible benefits through an unfair advantage because of their insider status. To avoid this give everyone in the organization an equal opportunity to bid. If some do not respond, then you have an honest reason for not selecting their proposal. Ask yourself if any of the options would create a perception of a conflict of interest? Try to protect your volunteers from being caught in the middle of perceived conflicts of interest by anticipating the potential for problems and establishing a check and balance system. This is another strong argument for setting up a publications committee in advance.

Be Sensitive to Problems. Every volunteer and every member in a society is a valuable member. By initially avoiding these problems, the society will not flounder because of internal fighting; volunteers will not be accidentally hurt by misjudgments; and good will/shall prevail.

A formal request for proposals should be designed to include many publishers. Members of the society and board who are publishers

should be allowed to submit bids like everyone else. Any member of the board who could benefit from the decision should be excluded from the discussion, and the decision-making process. In fact, to insure full and open discussion, the remaining members of the board could assemble as a task force or action committee without those having conflict being present. Excuse them while discussions are conducted.

Dealing with Proposals. In the formal request for proposals, all proposals become the property of the society. Some vendors insist that their bid be kept confidential so that their competitors do not learn the amount. So that the society is not accused of disclosing information erroneously, vendors should be told that their proposals will be discussed in an open forum with the decision-making board, and thus prices cannot be kept confidential.

CONCLUSION

A publications committee is essential to developing a publishing strategy for your project. The committee should establish publication guidelines, determine society involvement, address publishing contract concerns, and set policies to avoid conflict of interest. Dealing with these issues in advance will save countless hours and many frustrations.

FGS SOCIETY STRATEGIES SERIES

<i>SET</i>	<i>I.</i>	<i>STRATEGIES FOR SOCIETIES</i>
<i>SET</i>	<i>II.</i>	<i>STRATEGIES FOR PRESIDENTS</i>
<i>SET</i>	<i>III.</i>	<i>STRATEGIES FOR VICE-PRESIDENTS</i>
<i>SET</i>	<i>IV.</i>	<i>STRATEGIES FOR TREASURERS</i>
<i>SET</i>	<i>V.</i>	<i>STRATEGIES FOR SECRETARIES</i>
<i>SET</i>	<i>VI.</i>	<i>STRATEGIES FOR PROGRAM CHAIRPERSONS</i>
<i>SET</i>	<i>VII.</i>	<i>STRATEGIES FOR LIBRARIANS</i>
<i>SET</i>	<i>VIII.</i>	<i>STRATEGIES FOR EDITORS</i>

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