



Society Strategies

Federation of Genealogical Societies

P.O. Box 200940 Austin TX 78720-0940

Series Set I Number 23

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Set I Strategies for Societies

Five Steps to Organizing a Society

by Sandra H. Luebking

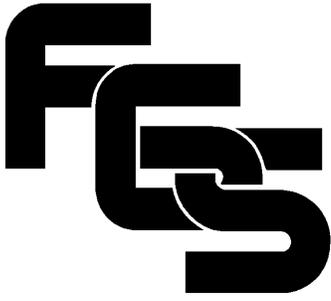
Supplemental Page

This paper is a checklist of steps to formally organizing a society.

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Set I Strategies for Societies Five Steps to Organizing a Society by Sandra H. Luebking

This checklist gives the key steps to formally organize a genealogical society. Details will be found in *Management Handbook: A Guide for Organizing and Managing a Genealogical Society*. An earlier edition of this work by Betty Robertson Kaufman identified the steps.

STEP 1. INVESTIGATE

Before forming a society, be sure to find out whether or not a similar organization exists in your immediate locality with the same objectives.

Does a state society exist to serve as an umbrella or support group? Can they assist with formation? If your plans include joining such a group, do they have regulations to which the new society must conform?

STEP 2. PRE-PLANNING SESSIONS

Although a single person may organize a society, it is best to work with a small group. Sharing ideas, resources, talents, and the workload is a good foundation for a successful organization.

This corps of enthusiasts should hold frequent pre-planning sessions with enough time between meetings for investigations and committee work to be accomplished. The pre-planning sessions give opportunity to lay groundwork, as follows:

1. Select a temporary presiding officer.
2. Select a temporary secretary to take minutes of planning sessions and first meeting.
3. Prepare a statement of purpose (mission) for the society. For example: "This organization shall promote genealogy and educational work of a professional nature, shall locate, preserve and index public and private genealogical records, and make such records available to members and the general public, shall encourage and instruct members in genealogical research through careful documentation, and shall maintain quality genealogical standards."
4. Select a working name for the society.
5. Determine the amount of dues.
6. Consider the types of membership.
7. Establish a permanent mailing address.
8. Get information on incorporation and tax exemption to present at the first meeting.
9. Prepare tentative bylaws in advance to be presented for approval at the first meeting.

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10. Prepare a volunteer survey to be distributed at the first meeting.
11. Establish terms for Charter members (usually from date of formation of the organization to end of first regular membership year).
12. Plan the first meeting: select the site, date, and time most convenient for the membership you hope to attract.
13. If a large attendance is anticipated, provide a podium and public address system.
14. Notify the general public or prospective members of the first meeting by promoting the event at least one month in advance.
15. Genealogical forms and charts should be made available for purchase.
16. Prospective members should be informed if classes in beginning genealogy will be offered, or given a prepared list of several titles of guidebooks for beginners.

STEP 3. FIRST MEETING

1. Place an attendance sheet with space for names, addresses, and telephone numbers at a greeting table and provide name tags.
2. The temporary presiding officer calls the meeting to order at the time advertised.
3. Selection of temporary presiding officer and secretary must be approved by those present.
4. State the purpose of the society and why it should organize; discussion should follow.
5. Adopt of the official name by vote.
6. Vote to approve the amount of dues.
7. Present tentative bylaws for discussion

- and approval and appoint bylaws committee.
8. Appoint the nominating committee as outlined in the bylaws.
9. If the group desires incorporation, appoint a committee to investigate the procedure and to draw up Articles of Incorporation.
10. Circulate a volunteer survey sheet.
11. A speaker on beginning genealogy could be a part of the program.
12. Set the time, date, and place of next meeting.
13. The presiding officer announces that dues will be collected and officers elected at the next meeting.
14. Refreshments could be served after the first meeting to encourage conversation and asking questions of the organizers.

STEP 4. SECOND MEETING

1. The temporary presiding officer calls the meeting to order.
2. The temporary secretary reads the minutes of the last meeting.
3. The presiding officer asks for the report of the nominating committee.
4. Officers are elected as stated in the bylaws.
5. The newly elected president takes charge of the meeting and the newly elected secretary assumes office.
6. The president calls upon the treasurer who announces that dues are payable.
7. The president reminds the members of the society objectives and asks for discussion.

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8. The president appoints committee chairs.
9. Regular meeting dates are decided.

STEP 5. RULES AND REGULATIONS

A society may adopt any rules and regulations it desires provided the rules conform to the adopted parliamentary law authority and do not conflict with the rules of a higher order. The five main types of written rules applicable to society formation are:

- A. Articles of Incorporation (Corporate Charter)
- B. Constitution
- C. Bylaws
- D. Rules of Order
- E. Standing Rules

The first three rules are documents which may overlap, and in many cases, may be combined; however, each rule serves a function. The last two are rules which define the details of parliamentary procedure and administration of a society. These rules should be adopted separately from the bylaws. The Rules and Regulations of an organization are defined in more detail in *Management Handbook*. Examples are given of Articles of Incorporation and Bylaws.

A. Articles of Incorporation

This is a legal instrument which sets forth the name and objectives of the society and other information required for incorporation, under the laws of the particular state. The “Articles of Incorporation” are also called “Corporate Charter.”

The Articles of Incorporation supersede all the other rules of a society, none of which may legally contain anything in conflict with the charter. Nothing in the charter may be suspended by the society itself unless the charter provides for this.

B. Constitution

This document states the relationship between the purpose of the society and its members. Articles in the constitution include the society’s name, purpose, who is eligible for membership, election procedures, amendments, and the procedure for dissolution.

C. Bylaws

Bylaws are the operational blueprint of an organization, and define the duties, privileges, and responsibilities of the officers and members. A useful reference on preparing bylaws is *Bylaws Workbook: A Handbook for New and Established Societies*.

It is now a recommended practice for rules such as the Constitution and Bylaws to be combined into a single document rather than the past practice of dividing the rules into separate entities.

During society formation, a committee of three should develop a set of tentative bylaws for presentation at the first meeting. Because bylaws are the fundamental rules governing any organization, they should conform exactly to a prescribed format.

1. Name of the society
2. Objectives or Purpose
3. Membership Categories and Dues
4. Meetings: how often, how called, by whom, special meetings, quorums
5. Officers and Directors: titles, terms, how elected
6. Executive (or governing) Board
7. Duties of Officers (and Directors)
8. Standing and Special Committees (duties)
9. Nominations and Elections

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10. Dissolution
11. Parliamentary Authority
12. Procedure for Amendments

D. Rules of Order

Rules of Order are written rules of parliamentary procedure which are adopted as part of the bylaws, and refer to the orderly transaction of business in meetings and to the duties of officers.

Most societies name an authority, such as *Robert's Rules of Order, Newly Revised*, in their bylaws and adopt only Rules of Order as needed to supplement the authority. Rules of Order can include the duties of officers, the order of business to be conducted during meetings, and the length and number of speeches allowed in debate.

E. Standing Rules

Standing Rules are an expansion of the bylaws, detailing the rights, privileges, and limitations of members, and relate to administrative details. They are designed to take care of the business of the society in a practical manner.

Standing rules are generally not adopted at the time a society is organized, but individually as the need arises. These rules can be easily changed by a majority vote but no previous notice. They may be adopted at any business meeting.

Examples of Standing Rules will be found in *Management Handbook*. They include the time and day of meetings, policies regarding the distribution of the society's periodicals, and the disposition of books and other materials obtained by the society.

CLOSE

The path to organizing a society is an arduous one. Careful planning and using this step-by-step process will pay dividends.

REFERENCES

Lindley, Marcia S., compiler. *Bylaws Workbook: A Handbook for New and Established Societies*. (Austin, Texas: FGS, 1996).

Luebking, Sandra H., editor. *Management Handbook: A Guide for Organizing and Managing a Genealogical Society*. (Austin, Texas: FGS, 2000).

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