



Society Strategies

Federation of Genealogical Societies

P.O. Box 200940 Austin TX 78720-0940

Series Set I Number 21

February 2000

Set I Strategies for Societies

Installation of Officers

by Marcia Struthers Lindley

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 provides scripting and procedure for an installation of officers ceremony. This ceremony only takes a few minutes, and serves to symbolically bind the newly elected officers and members together for the good of the society.

The information on page 4 which directs the interested person on how to obtain copies of this paper is incorrect.

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Set I Strategies for Societies Installation of Officers

by Marcia Struthers Lindley

In many genealogy societies, the retiring president simply hands the incoming president a stack of folders and notebooks, shakes hands, and says, "Good luck!"

The same is true of other officers. The new recording secretary, registrar, and treasurer are also given papers and ledgers; they might even be told to call if they have questions. Other officers merely show up at the next board meeting, uncertain where to start.

A BETTER WAY

But, maybe, there's a better way. Why not consider using a ceremony to transfer power, thus gaining an awareness by the membership of the duties of officers along with a healthy respect by the incoming officers for their new responsibilities. Someone who might have accepted a nomination to an office as an ego enhancer or who just had an arm twisted to take a job no one else wanted might instead realize that the office requires dedication and hard work and that performing it well can provide great satisfaction. At the same time, your society will benefit from the inspired efforts of its committed officers. A ceremony to install your new officers might accomplish all that and more.

COMBINE EVENTS

If your society does hold a ceremony for installing new officers, consider combining it with some other special occasion, i.e., the celebration of a completed project. You could read the names and contributions of the corps of workers involved or you could hand them certificates of appreciation. Some groups hold a luncheon or dinner to honor these volunteers; other societies serve punch and cake in a less formal setting.

The presentation of new officers to the members could include the introduction of those who, throughout the year, keep the society functioning. These are the folks who serve on committees, who work in libraries or in society offices, or who produce society publications. This salute allows other members to see the "behind the scenes" people who bring experience and continuity to their tasks.

The easiest way to recruit new volunteers, who are the members most likely to become officers some day, is to demonstrate appreciation for volunteer efforts and let everyone know what types of volunteer jobs are available.

Other concurrent event possibilities are a founders' day, an annual membership meeting, a society anniversary, or a memorial event. Of course, if your society conducts its election of officers at the annual meeting, it will be difficult to install the new officers immediately unless the offices are uncontested and the outcome a foregone conclusion.

Even if there is an installation ceremony, your old and new officers should meet later at a workshop. Use this time to pass on those infamous notebooks and ledgers and share knowledge about upcoming society events, current problems, and ideas the old officers didn't have time to address.

IDEAS FOR THE CEREMONY

Once you've decided on the appropriate event for installing your officers, your next step is to plan the ceremony. A nice touch is to present the retiring officers to the gathering and formally thank them for their work. Here's a sample speech of thanks:

One year (or two, depending on the length of your officers' terms) ago, you were elected and installed as officers of the (society). Because each one of you has performed your assigned job as promised, this society has prospered and served the genealogical community well. A new slate of officers has now been elected, and it is my pleasant duty to thank each of you for a task well done and for the excellent year this society has experienced. You are now released from the offices you have held this past term.

Another option is to first install the new officers and then thank the retiring officers for their service, perhaps presenting each with a certificate.

SAMPLE OATHS OF OFFICE

How much time is available for the occasion? The ceremony will be shorter if you install all the officers at once. The advantage to installing each officer separately is that it gives the new officer and the members an idea of the duties of each office.

The members do not always fully understand what their society officers do, so a reminder can be helpful.

Here's a suggested oath of office when installing officers as a group:

Will (read the names of the officers being installed) please come forward? Please raise your right hand, and answer the question I now ask you with the words, "I do."

Having been duly elected to an office in the (society), do you solemnly promise to uphold the bylaws of the society and to truly and faithfully discharge the duties of your offices to the best of your abilities and, at all times, to conduct yourselves in a manner becoming a society officer?

or:

As officers of the (society), it is your responsibility to attend all meetings of the board of directors, to provide leadership and direction to the membership, to establish goals to be achieved and projects to be completed during the term ahead, to keep records of the board actions, to protect and account for the society treasury, and to report this success to the society membership. Will each of you accept these responsibilities as officers of the (society)? If so, say, "I will."

Remember to adapt any oaths, whether general or specific, to the offices of your society and the duties assigned by your bylaws and by your policies and procedures manual.

Sample oaths for installing each officer individually:

President: *As President of (society), it is your responsibility to preside at all meetings of the board of directors and the society, to provide leadership and direction to the membership, to work with the board to establish goals to be achieved and projects*

to be completed during the year(s) ahead. Will you accept these responsibilities?

Vice President: Will you assist the President in (his/her) duties as the chief officer, conduct meetings in the President's absence, and serve the membership of the society as requested?

If your society has more than one vice president, you can craft the oath to accommodate their different functions. For example:

First Vice President: As First Vice President, it is your responsibility to assist the President and to assume the duties of that office when the President is absent, to provide interesting and educational programs to the membership, and to publicize the activities of this organization. Will you accept these responsibilities?

Second Vice President: As Second Vice President, it is your responsibility to assist the President and to assume the duties of that office when the President and First Vice President are absent, to oversee the collection and retention of genealogical records for the society, and to be on the alert for newly discovered records and to seek ways to make them available to researchers. Will you accept these responsibilities?

Recording Secretary: As Recording Secretary, it is your responsibility to faithfully record the meetings of the society and the board of directors and to maintain the official documents of the society. Will you accept these responsibilities?

Corresponding Secretary: As Corresponding Secretary, it is your responsibility to receive and distribute all correspondence of the society, to respond to those letters and queries directed to the society, and to provide notice to the members of society activities. Will you accept these responsibilities?

Treasurer: As Treasurer, it is your responsibility to protect the funds of the society, to disburse monies

as authorized by the board of directors and the membership, and to maintain proper records of the society's financial transactions. Will you accept these responsibilities?

Registrar: As Registrar, it is your responsibility to collect dues and to transmit the money received to the Treasurer, to maintain membership records, to issue membership cards, and to provide an annual membership directory. Will you accept these responsibilities?

If your society's retiring president remains on the board of directors as either a voting or nonvoting immediate past president, you can also include a mention of that position.

As **Immediate Past President** of the (society), it is your responsibility to serve as a member of the board of directors and to work with the other officers to provide continuity in the activities of the society. I now remind you that you accepted these responsibilities one (or two) years ago when you were installed as President.

Sample oath for directors-at-large, board trustees, or similar types of general officers:

Directors-at-Large, it is your responsibility to assume a leadership role in the society, report on the activities of committees for which you serve as liaison, and perform other duties assigned to you by the President and the board. Will you accept these responsibilities?

A FINAL TOUCH

After your officers have stated their willingness to accept the responsibilities of their offices, you can end your ceremony by inviting the members to also participate in the event. Ask them to stand and take an oath, which can strengthen the ties among members and further promote the goals of your society. Here's a sample oath:

Members of our society, you, too, have a responsibility in assuring that these newly installed officers will have a successful term of office. It is your responsibility to support your officers in their efforts to fulfill the goals of the society, to attend meetings and events of the society, to graciously accept an invitation to serve on a committee or to perform other volunteer duties for the society, and to offer your ideas to the officers for society activities. Will you accept these responsibilities?

The installer can then close the ceremony with:

Congratulations! Let me wish each of you, officers and members alike, a successful term of office.

NOTE: These societies contributed ideas: the Colorado Council of Genealogical Societies, the Iowa Genealogical Society, the Germans from Russia Heritage Society, and the Ozarks Genealogical Society.

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