



Society Strategies

Federation of Genealogical Societies

P.O. Box 200940 Austin TX 78720-0940

Series Set II Number 4

September 2001

Set II Strategies for Presidents

A Lakeside Retreat

by Rhonda S. Norris, CGRS

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 getting away from the normal environment of the board room and getting out into an environment which nurtures creativity and new ideas.

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 II Number 4

September 2001

The FGS Society Strategy 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 II: Strategies for Presidents A Lakeside Retreat

by Rhonda S. Norris, CGRS, Russellville, Arkansas

On a sunny day in late fall, twenty two board members of the Arkansas Genealogical Society met at a rustic, lakeside cabin. They came from all over the state to relax, think, and plan society goals. There were no telephones, no television, and no other distractions. This was a retreat—a working retreat.

Planning had begun when the Arkansas Genealogical Society Board of Directors voted to hire a professional facilitator. The society was at risk: there seemed to be no vested interest, there were communication concerns,

and it was feared the society might become divided on some issues. The retreat was an attempt to become better acquainted with each other, clearly define the organization's objectives for the coming year, and develop strategies to obtain the goals that were set.

THE DAY BEGINS

The participants gathered at a large table with pencils and paper in hand. They were ready to make a difference for the society. It was a day that would be spent getting to know one another, through various activities and during the relaxation periods.

But it wouldn't be all work. At lunchtime we sat on the old cabin porch, smelling the fresh fall air, observing the calmness of the lake, and savoring a pot luck lunch with all the trimmings. It was a memorable experience.

The retreat started when the facilitator asked us to play a game. Each board member had to write down on a small piece of paper one thing they had done that no one else on the board knew about. Throughout the day the facilitator would choose and read from the slips turned in and we had to determine who



A Lakeside Retreat

would have done such a thing. This was a way to make us relax, get to know each other better, and share some laughter.

THE WORK BEGINS

The work began when the facilitator asked us what we hoped to gain from this meeting. After we responded, she wrote statements on 14 large sheets of white paper. She posted these sheets throughout the cabin and instructed us to complete the statements. Each of us went from sheet to sheet, writing down what each statement meant to us. Some of the statements were:

- 1) The first thing I remember about AGS
- 2) What has changed about our organization
- 3) What opportunities do we need to take advantage of this coming year
- 4) Program/activities we should continue or discontinue
- 5) The most positive things about AGS include.

FORMING COMMITTEES

The retreat was an opportunity to form committees for people with vested interest. To name a few: awards, education, membership, publications, and seminar/programs. Each board member chose the committee(s) they wanted to serve on and each committee then chose a chair.

Once the chair was named, the committee had to decide what was to be accomplished. For instance,

- The publication committee decided that the Arkansas Genealogical Society quarterly, *The Family Historian*, was an important part of the society. However, a newsletter was added to keep members updated on what was happening between the quarterlies. The society now publishes

four issues of the magazine and four of the newsletter.

- The education committee decided to hold teacher training sessions and design a lesson plan on family history research. These would be aimed at teachers who were assigning projects within the school systems.
- A seminar/program committee would coordinate the annual seminar and look into sponsoring a NGS Regional Conference in our area.
- The membership committee would develop a membership packet that would welcome and inform each new member.

These are just a few of the responses but hopefully there's enough to give your society ideas for planning your own retreat.

OBJECTIVES & STRATEGIES

The facilitator provided each committee with a sheet of paper that contained the following headings under the title, Objectives and Strategies:

- 1) Objective: What is your intention; what do you plan to achieve? What end result do you want?
- 2) Strategies: What action steps will be necessary to reach the objective? When will this step be completed?
- 3) Who will be responsible?
- 4) What resources are needed to accomplish the goals set?

These were discussed in detail, with an eye towards what we as a society hoped to accomplish in the coming year(s).

The Arkansas Genealogical Society looked ahead by designing goals through 2003. The goals were set on a time line so that we would

A Lakeside Retreat

begin work the moment we left the retreat. Some of the goals defined include:

- promote general advancement in genealogical education for our members
- provide teacher training in family history research
- reach a goal of 2000 members
- sponsor a family history writing contest
- publish a quarterly newsletter
- hold two quality seminars per year
- interact more with local societies
- utilize the Web to mount indexes and searchable data bases
- sponsor a regional seminar

And most of all it was decided that we should have fun!

RESULTS

I am proud to say that many of the goals that were put in motion during this retreat are in progress or have already been reached. The consensus of board members was that the retreat was productive and beneficial.

DESIGN A RETREAT

Can a retreat help your society define goals and actions? Yes, if you follow a few simple guidelines.

THE DAY

It is best to choose a time other than your regular meeting to plan a retreat. The regular meetings are too busy and don't allow for in-depth discussion of long range plans. By setting aside a day specifically designed for becoming better acquainted, setting goals, and developing strategies to achieve these goals, much can be accomplished.

THE FACILITATOR

We felt the use of a professional facilitator contributed to the success of the day's activities and outcome. A professional brings an objective view, knows how to work with a variety of personalities, and can introduce subjects and tactics in an evenhanded and practical manner. Engaging a professional allows everyone on the board to participate. No society officer or director needs to be a leader but can instead freely contribute ideas and interact with the rest of the board.

THE TOPICS

Some topics for exploration at your society's retreat might include

- Does your society want a Web page and, if so, does your society want to design and manage the site?
- Does your society want to do publications?
- Does your society want to hold ancestor fairs?
- Does your society want to become more involved in the community by promoting genealogy?

WE RECOMMEND

There were many ideas that flowed throughout the day concerning the hopes and dreams of the Arkansas Genealogical Society. The retreat was definitely a success. AGS highly recommends the commitment of time and expense of a retreat to get your society on track and running strong for the future.

BIBLIOGRAPHY

Hughes, Sandra R. *To Go Forward, Retreat! The Board Retreat Handbook*. 1999. Includes a board retreat checklist and pre-retreat planning questionnaire, and suggestions for selecting an outside facilitator. \$22.50 from

A Lakeside Retreat

National Center for Nonprofit Boards. Call 1-800-883-6262 or visit <<http://www.ncnb.org>>.

ON-LINE ASSISTANCE

There are several Web sites pertaining to the selection of a retreat site or a facilitator. These tend to be commercial sites, advertising individual consultants or management businesses. Following are examples (these are not recommendations) of sites available.

1. Authenticity Consulting: This company offers help to non-profit corporations and small businesses. Their services include a "free management library," and on-line tuition-based study programs to learn how to set up a business. There is a directory of consultants. <<http://www.authenticityconsulting.com/>>

2. Management Development Network: This organization has as its members facilitators and business consultants. There is an on-line detailed step-by-step guide (9 Steps in all) to selecting a consultant or trainer that should prove useful. <<http://www.mdn.org.uk/choosing.htm>>

3. Bruce Withrow Associates: A Canadian firm that specializes in finding facilitators in the United States and Canada. Provides a directory of facilitators in North America which includes their qualifications. Also has suggestions for finding someone most suited to your needs. <<http://www.facilitators.com/index.htm>>

4. Asheville, North Carolina Facilitation: The site of Doug Silsbee, professional facilitator, gives photos and details about Bend of Ivy Lodge, a site for outdoor training or group retreat of management teams. <<http://www.bendofivylodge.com/support.htm>>

ABOUT THE AUTHOR

Rhonda S. Norris, CGRS, author of "*Arkansas Links*" *A Comprehensive Guide to Genealogical Research in the Natural State*; is a professional researcher; teacher and lecturer. She serves on the Arkansas Genealogical Society board, is past president of *Ancestors Unknown*, and has written articles for *On Board*, *Everton Publishers*, and *River Valley Living*.

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
SET	VII.	STRATEGIES FOR LIBRARIANS
SET	VIII.	STRATEGIES FOR EDITORS

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.