



# Society Strategies

Federation of Genealogical Societies

P.O. Box 200940 Austin TX 78720-0940

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Series Set VI Number 7

2002

## Set VI Strategies for Program Chairpersons

### Perfecting the Art of Planning a Local Seminar

by Carmen J. Finley, Ph.D., CG

## 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 presents the experience of a genealogy society whose work hosting a speaker for a local seminar can assure your experience will be as cordial and productive as their event.

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 VI Strategies for Program Chairpersons Perfecting the Art of Planning a Local Seminar

by Carmen J. Finley, Ph.D., CG

### INTRODUCTION

The Sonoma County Genealogical Society (SCGS) has developed planning strategies for all-day seminars that provide top-notch speakers and make enough money to finance activities that do not support themselves.

SCGS is located in Santa Rosa, California, 50 miles north of San Francisco<sup>1</sup>. The society has about 375 members. SCGS has offered seminars since 1992, but major changes were made in 1998. The strategies perfected since then may benefit others.

### SUCCESSFUL SEMINARS

Some key ingredients to a successful seminar are (1) obtain a top-notch nationally-known speaker; (2) use a committee to handle planning; and (3) learn from your experience through evaluation.

#### (1) Obtain a Speaker

Finding the right speaker is no small chore. Our members who attend regional or national conferences are assigned to scout out potential speakers who are knowledgeable in the field and able to hold the attention of the audience.

When a potential speaker is identified, one or more of his/her lecture tapes is purchased so that others can hear a sample of the person's delivery. Those who have listened to speakers live or on tape, nominate their favorites.

At the first meeting of the seminar planning committee, usually in September, the group reviews these speaker nominations along with information gleaned from the Genealogical Speakers Guild<sup>2</sup> and elsewhere on the Internet.

Searching Google<sup>3</sup> for the name of the speaker candidate will usually bring up helpful information and often a list of the tapes that have been produced by that person. Also listed might be any recent seminars given by a potential speaker in your area.

Armed with this information, and whatever else members of the planning committee contribute, a ballot is taken of the six or eight persons on the list. The speaker candidate who receives the highest rating is then contacted, not for the coming year, but for the following year. The society has found that planning a full year and a half ahead avoids conflicts in scheduling both the speaker and the facilities.

## Perfecting the Art of Planning a Local Seminar

### (2) Use a Planning Committee

The planning committee consists of ten persons, including the SCGS president in an advisory capacity. Titles and responsibilities include: Chairperson; Secretary; Treasurer; Speaker; Registrar; Facilities; Publicist; Vendors; Packet Preparation for Participants; Lunch and Refreshment Arrangements. Someone is also responsible for Post-Seminar Evaluation.

A monthly meeting keeps everyone on track and serves as an information source about the seminar. The secretary and treasurer perform the typical job functions, while the remaining committee members serve as follows:

#### **Speaker Liaison**

One committee member makes all contacts and arrangements with the speaker. This begins with the invitation and negotiation of dates. It includes coordinating the selection of topics (a function of the committee-at-large), obtaining information for publicity, determining speaker needs (equipment, printed material the speaker wishes to have reproduced, etc.), assisting in transportation needs, making local hotel reservations, meeting the speaker on arrival and being available throughout the duration of their stay. This committee member also arranges a dinner for the speaker and committee members following the seminar.

#### **Registrar**

The registrar is the person who receives the registration form and the payment from persons planning to attend. Fees vary depending on the membership status of the individual. The philosophy of SCGS is to keep rates low in order to encourage better attendance: SCGS pre-registered members pay \$15, non-members \$18; walk-ins on seminar day pay \$20 regardless of membership. An optional box lunch is \$10.

The registrar develops a database of reservations and forwards checks to the treasurer. In the last week before the conference, the registrar prints name labels for attendees and master lists of

pre-registrants for the registration desk. Lists also show orders for the three box lunch options. The name tag is coded with one of three colored dots if a lunch has been ordered.

#### **Facilities Liaison**

One member is designated as liaison between the society and the meeting place. In 1998, a major change was to move to a local facility that had a 400 seat auditorium. This was an improvement over the previous facility, but also was considerably more expensive. The society in 2001 paid \$885 for rental of the auditorium. To the basic rate, other charges are made for additional requirements (tables, audiovisual equipment for the speaker, etc.).

#### **Publicist**

Publicize, publicize, publicize! Getting the word out is an on-going process that begins at least nine months before the planned event.

Seminars tend to be held in late March, so the first effort usually begins the preceding May or June. The speaker liaison obtains material and photo from the speaker, and writes the first publicity which goes onto a Web page<sup>4</sup>. This is used as the basic information to be developed in different formats—fliers, mailers to local news media, and the program to be included in participants' packets.

The message is delivered by several members in a number of ways. The person who develops the Web page contacts other local, state, and national Webmasters to ask them to link to a page announcing the new speaker. While these requests are not 100% effective, at the national level cooperation is always received from the Federation of Genealogical Societies (FGS), the National Genealogical Society, Genie Speaks, and Dick Eastman, whose column is read by thousands of persons. At the state level, CAGenWeb can always be counted on. The California State Genealogical Alliance (CSGA) also helps get the word out.

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In the San Francisco Bay Area many of the CAGenWeb county pages will link to the SCGS announcement. Notices are posted to NORCAL, the Northern California mailing list several times during the months preceding the seminar.

SCGS has a person who is the official liaison with both FGS and CSGA. She takes fliers to all regional and national meetings. She visits nearby county societies to hand deliver fliers and to announce the coming event. The SCGS newsletter carries articles several months before the event. In January, a full-page colored flyer is inserted into the newsletter.

Local and nearby Family History Centers receive flyers. Flyers are distributed to all branch libraries in Sonoma County. Local genealogy classes receive flyers. The society's publicity person contacts all newspapers and TV stations on the regular mailing list.

As a community service, the local newspaper will provide free display ads once a year, if requested six months in advance. In the first couple of years this ad occupied one-sixth of a page. Last year it was somewhat smaller, but still very generous. Participants at the seminar receive a flyer in their packet announcing the next year's seminar.

It is impossible to overemphasize the importance of publicity.

### Vendors

SCGS has not been successful in attracting many commercial vendors, although those who do come provide interesting materials and are supported by audience members.

### Packet Preparation

One committee member takes responsibility for printing the materials that go into packets for the participants. These usually include the speaker's outlines and notes, a program, a list of SCGS publications for sale, and an evaluation form, along with a flyer for the next seminar. The

planning committee members assemble the packets in about 1½ hours.

### Lunch and Refreshments

One committee member sees that coffee and muffins are available before the seminar and during session breaks. That person also relays to the caterer the number and kind of box lunches ordered, and oversees their distribution on seminar day.

### (3) Learn through Evaluation

Participant evaluation is critical but having the form in the packet does not guarantee a good response. The seminar chairman, during the opening announcements and at each break, reminds the participants that evaluations are critical to future planning.

In addition to comments on the speaker, facilities, and vendors, we ask where they heard about the seminar and how many years they have been doing genealogy.

In 2001, an 85% return was received from a group of 237 persons. The analysis includes a breakdown of pre-registered members and non-members, walk-ins and where attendees came from. The 2001 analysis revealed that 130 members and 107 non-members attended. Of these, 1 member and 40 non-members registered "at-the-door."

One disappointment for SCGS is that a high proportion of our own members typically do not attend. On the other hand, it is heartening to find that the seminar drew over 100 persons who are not members.

Equally revealing is an analysis of their residence by county (other than Sonoma). Thirty came from adjacent counties, 23 from the Bay area, and 16 traveled from a distance more than 100 miles from Santa Rosa.

Vital to the publicity effort, SCGS asks participants how they became aware of the

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seminar. Responses for the March 2001 seminar showed the majority (103) received the news through the SCGS Newsletter. Referrals from friends was the second most popular method (28) while reading about the event in other newsletters drew 19.

The Web site attracted 17 registrants; a flyer posted at a nearby Family History Center drew 16. Announcements in the local newspaper appealed to 13 and a letter or announcement by the president also gained 13 attendees.

Other efforts were responsible for under ten registrants each: a posted flyer at the library, an announcement in a genealogy class, and posting on a local area events calendar.

### SUMMARY

The experience SCGS has accumulated over the past four years has demonstrated that this model for seminar planning is successful. However, any society that undertakes planning a seminar as a way to educate their members and provide funds for other society activities, must be willing to spend a lot of time in advance

planning. The guidelines discussed in this paper can be adapted for specific needs to make any local seminar a success.

### NOTES

1. Sonoma County Genealogical Society, PO Box 2273, Santa Rosa, CA 95405-0273.
2. Genealogical Speakers Guild Web site: <<http://www.genspeakguild.org/>>.
3. Google: <<http://www.google.com/>>.
4. The Sonoma County Genealogical Society's Web site is at <<http://www.scgs.org/>>.

### ABOUT THE AUTHOR

Carmen J. Finley, Ph.D., CG, chairs the NGS Family History Writing Contest and has authored numerous articles that have appeared in FORUM the *National Genealogical Society Quarterly*, the *American Genealogist*, the *Virginia Genealogist*, and others. Her *Finleys of Early Sonoma County, California* was published in 1997 by Heritage Books, Inc. She is the UsGenWeb's coordinator for Augusta County, Virginia.

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