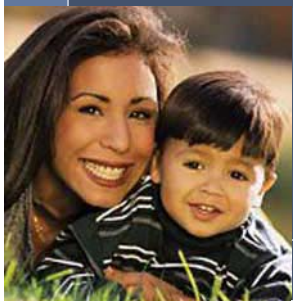



# Societies Going Virtual

David E. Rencher, AG, FUGA

Federation of Genealogical Societies – Visions for the Future

7 September 2005



  
**FAMILYSEARCH™**  
WHERE GENERATIONS MEET



# Societies Going Virtual

Introduction

Society Business Models Today

Revenue Model Options for Societies

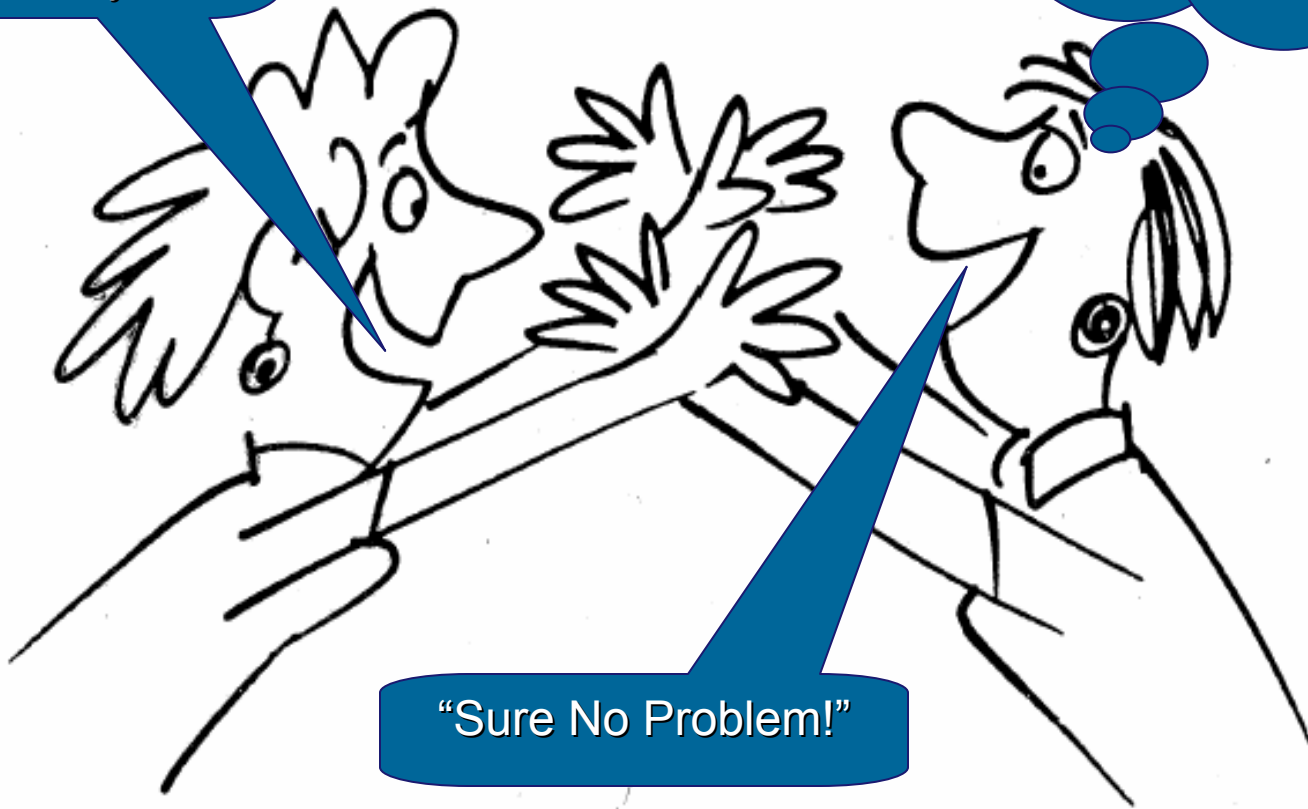
Non-profit Support for Societies

Conclusion



# Introduction

“Let’s Start a  
Genealogical  
Society”



“Sure No Problem!”

Stress is when your  
gut says “no way”  
and your mouth  
says  
“Sure, no problem!”



# Agnes R.I.P. (our beloved founder)





# Introduction – Societies Going Virtual

- ❖ Why do people join societies?
  - Learn new research techniques and information
  - Participate in a common purpose
  - Social and educational interaction
  - Leave a legacy
  - Recognition for efforts
- ❖ Why are society memberships down?
  - Two words...Internet Genealogy!



# Types of Genealogical Societies

❖ Local

❖ Old Buncombe  
County Genealogical  
Society

❖ Local Ethnic

❖ Afro-American  
Historical &  
Genealogical Society  
of Cleveland



# Types of Genealogical Societies

❖ Regional

❖ Tri-State  
Genealogical Society  
(IL, IN, KY)

❖ Regional Ethnic

❖ Societe Historique  
Acadienne

❖ Regional State

❖ Western Michigan  
Genealogical Society

❖ Regional Umbrella

❖ Federation for Ulster  
Local Studies



# Types of Genealogical Societies

❖ State

❖ The North Carolina Genealogical Society

❖ State Ethnic

❖ Jewish Genealogical Society of Illinois

❖ State Umbrella

❖ The California Alliance



# Types of Genealogical Societies

❖ National

❖ National Genealogical Society

❖ National Ethnic

❖ Italian Genealogical Society of America

❖ National Umbrella

❖ The Federation of Genealogical Societies



# Types of Genealogical Societies

❖ Libraries

❖ Friends of the Dallas Public Library

❖ Family Associations

❖ Rose Family Association

❖ Professional Genealogists

❖ The Association of Professional Genealogists

❖ State Professional Genealogists

❖ Professional Genealogists of Arkansas, Inc.



# Types of Genealogical Societies

❖ Professional Speakers

❖ Genealogical Speakers Guild

❖ Professional Writers

❖ International Society of Family History Writers & Editors



## New England Historic Genealogical Society - 1845





# Introduction – Societies Going Virtual

- ❖ The dilemma for genealogists...
  - Spend \$25 - \$35 on a membership *versus* \$25 - \$35 on the Internet
  - Increasing disconnect for distance members on what your society can offer in a paper business model
  - People vote with their money



# Introduction – Societies Going Virtual

## ❖ The dilemma for society officers...

- How do we get more members?
  - How do we grow the distance membership and keep our local members happy?
- How do we deliver value to the membership without the same cost framework?
- When we do need fees, how are they going to come?
  - How do we add value to our society to compete with the Internet?
  - What things absolutely have to cost money?



# Current Business Model for Societies

- ❖ Model is Membership Driven
  - Revenue is driven by cost of membership and the number of members
  - Costs are figured on a “cost-per-member” basis
  - Publications are the primary focus
    - Journals, periodicals and serials
    - Newsletters
  - Seminars and Institutes
    - Monthly meetings with speakers
  - Sponsored trips to Archives and Libraries
  - Library collections and entrance fees



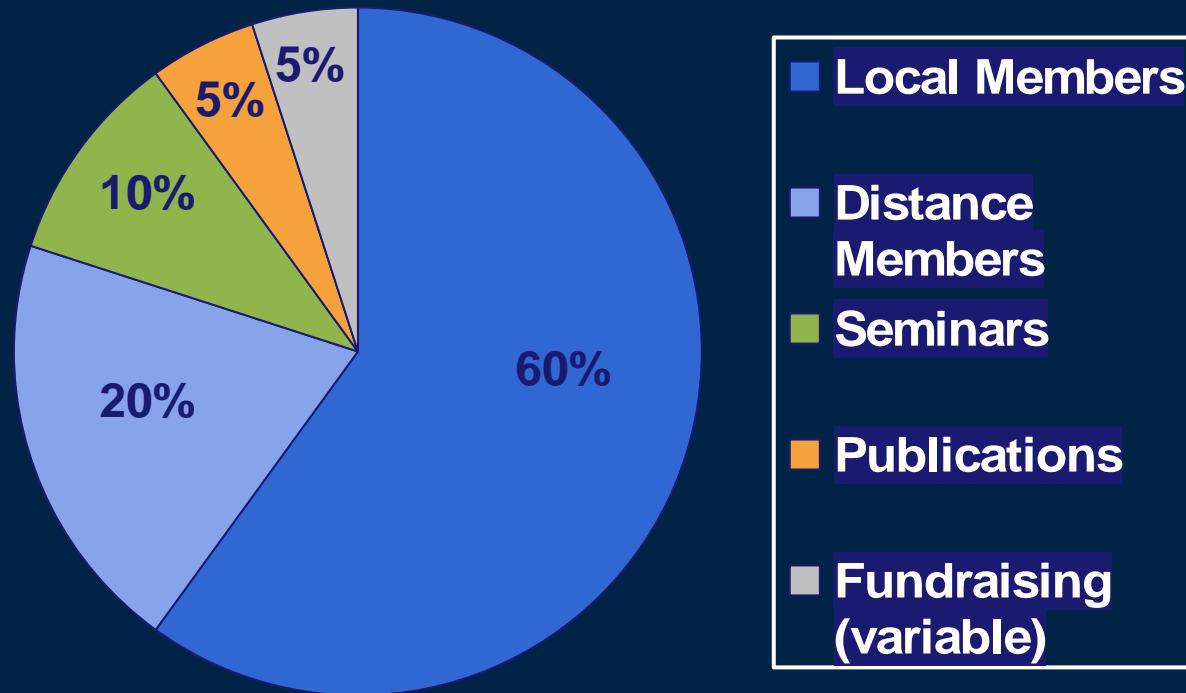
# Current Business Model for Societies

- ❖ When memberships decline...
  - Publication costs remain constant
  - Seminar costs remain constant or increase cost-per-member
  
- ❖ Model no longer supports paper products
  - Paper prices are increasing
  - Postage costs continue to increase
  - Standing inventories of unsold paper products consume space and value decreases
  - The Internet can deliver more value per dollar than your society business model



## Current Society Business Model – Paper Centric

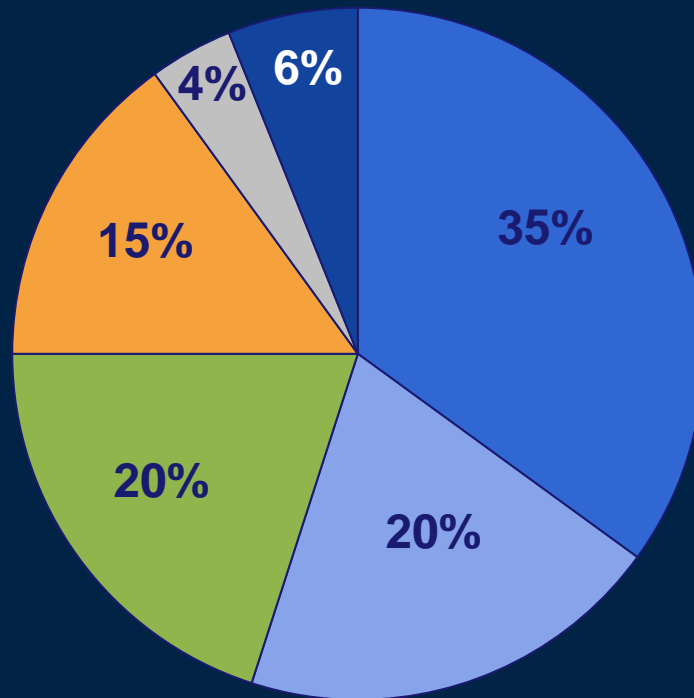
Sources of Income





## Current Society Business Model – Paper Centric

### Expenses



- Printing
- Postage
- Speaker Fees
- Office Supplies
- Telephone
- Miscellaneous



## Challenges with the Current Business Model

- ❖ Significant hard dollar costs for paper publications
- ❖ Heavily dependent on **successful** conferences, seminars and institutes
- ❖ Relies heavily on local members
- ❖ Volunteer resources are mostly local
- ❖ Often dependent on additional fundraising when shortfalls occur
- ❖ All of these challenges are historically related to a non-virtual society environment



# Shifting the Current Business Model

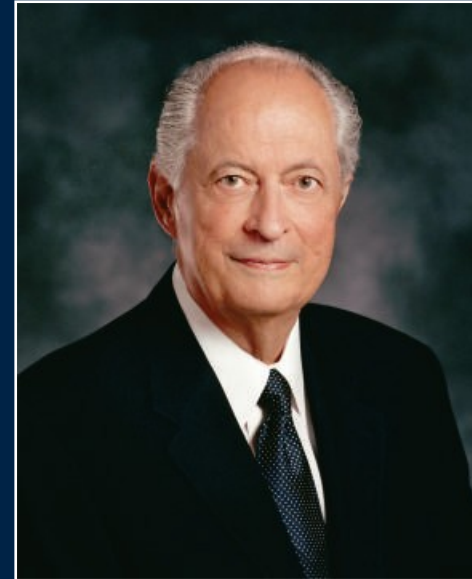
- ❖ How does a society shift its current business model?
- ❖ Focus on strengths and exclusivity
  - Knowledge of local area and records
  - Genealogical information of members
  - Volunteers to marshal resources
  - Existing publications – what would it take to make them virtual?
- ❖ Pay attention to your selection for the chair of your nominating committee



## Challenges with Nominating Committees

“The most talented don’t get hired [nominated], the most comfortable do...”

In other words, we often select the most comfortable instead of the most talented



Robert D. Hales,  
Former Executive, Max Factor  
Corporation;  
Quorum of the Twelve Apostles



## Opportunities for Nominating Committees

- ❖ Assess the needed skills for your society
- ❖ Identify those on the Board of Directors who currently have those skills
- ❖ Identify the skills that your board will be losing with those who are retiring
- ❖ Cultivate relationships with those who may have the needed skills either locally or outside your area
- ❖ You may need to advertise for candidates



# Board of Directors – Skills Needed

## Current Model

- Leadership
- Journalism/Newspaper
- Project Coordinators
- Program Directors
- Desktop Publishing
- Office Manager
- Secretarial
- Accounting
- Fundraising
- Legal Advisor - Copyright

## Future Model

- Leadership
- Web Marketing
- Project Coordinators
- Computer programming
- On-line publishing
- On-line services – (Web cast, support, on-line research)
- Web Design
- Indexing Coordinators
- On-line Community Organizers
- Open Source, Open Content



## Typical Board of Directors – State Society

### North Carolina Genealogical Society - 2005

President	Elliott Futrell, Goldsboro, NC
1 <sup>st</sup> Vice President	Terri Hopkins, Willow Springs, NC
2 <sup>nd</sup> Vice President	Ann Clough Basnight, Washington, NC
Secretary	Crestena Jennings Oakley, Greenville, NC
Treasurer	Judith Garner Hinton, Raleigh, NC
Past President	Beverly Tetterton, Wilmington, NC
Coastal Director	Louise Miller Cowell, Washington Park, NC
Piedmont Director	Larry W. Cates, High Point, NC
Mountain Director	Janet N. Norton, Old Fort, NC
At Large Director	Victor Jones, Jr., Ernul, NC
At Large Director	Leonard Dean, Raleigh, NC
At Large Director	Beverly Cato, Greensboro, NC
NCGS News Editor	Larry W. Cates, High Point, NC



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<b>At Large Director</b>	Beverly Cato, <b>Greensboro, NC</b>
NCGS News Editor	Larry W. Cates, High Point, NC



## Future Society Business Model – Virtual Centric

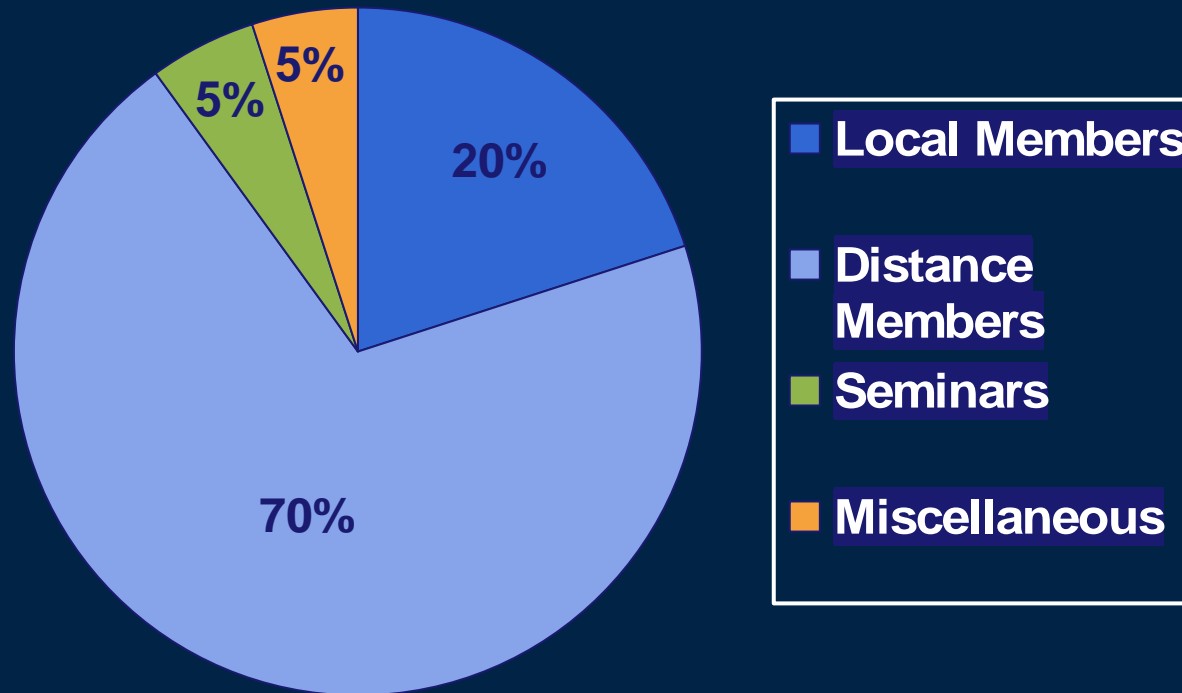
### ❖ Distance members – mining the opportunity

- Are you trying to identify people in North Carolina interested in genealogy *versus* people interested in North Carolina genealogy?
- In a paper centric model, having distance volunteers doesn't really make sense
- Significant lack of tools to have distance volunteers participate in a meaningful way
- What if...



## Future Society Business Model – Virtual Centric

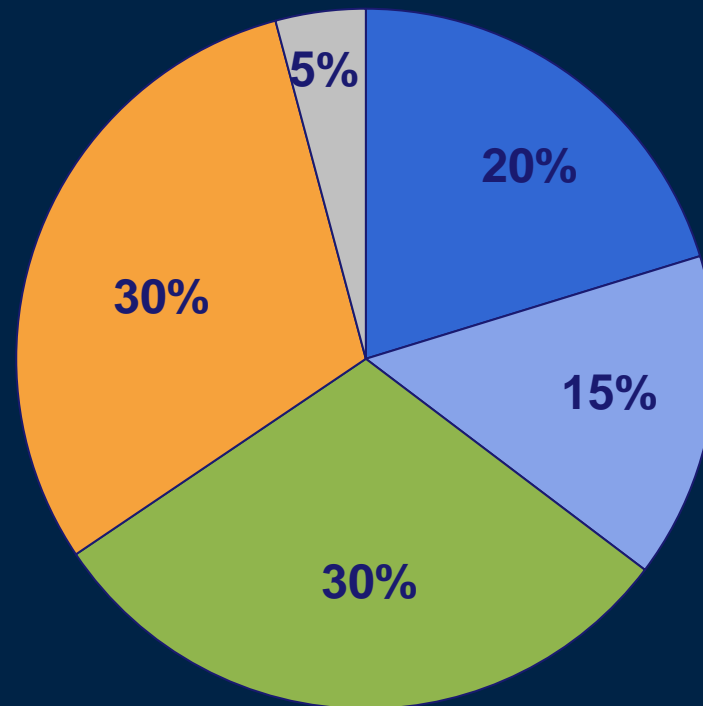
Sources of Income





# Future Society Business Model – Virtual Centric

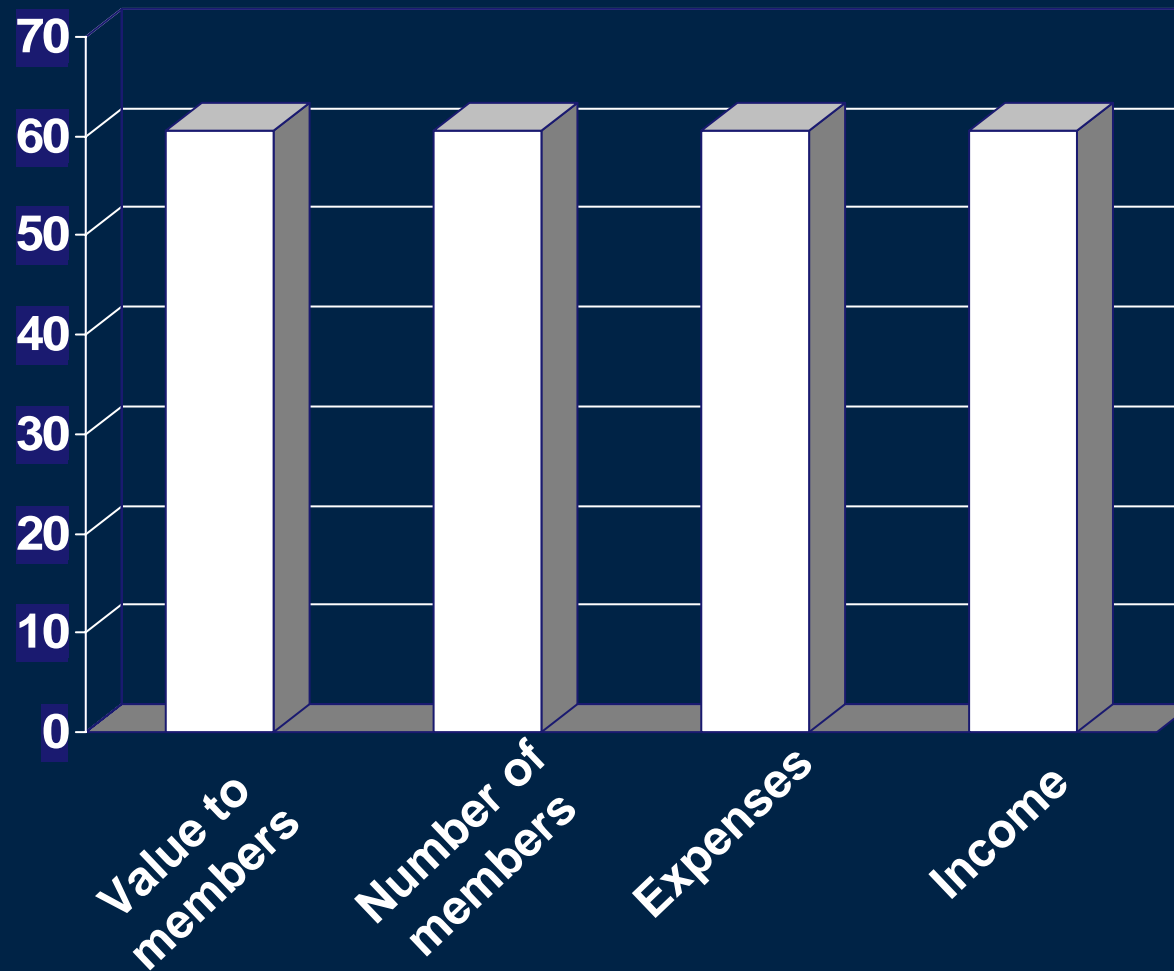
## Expenses



- Web Design
- Image Hosting
- Project Costs
- On-line Services
- Miscellaneous

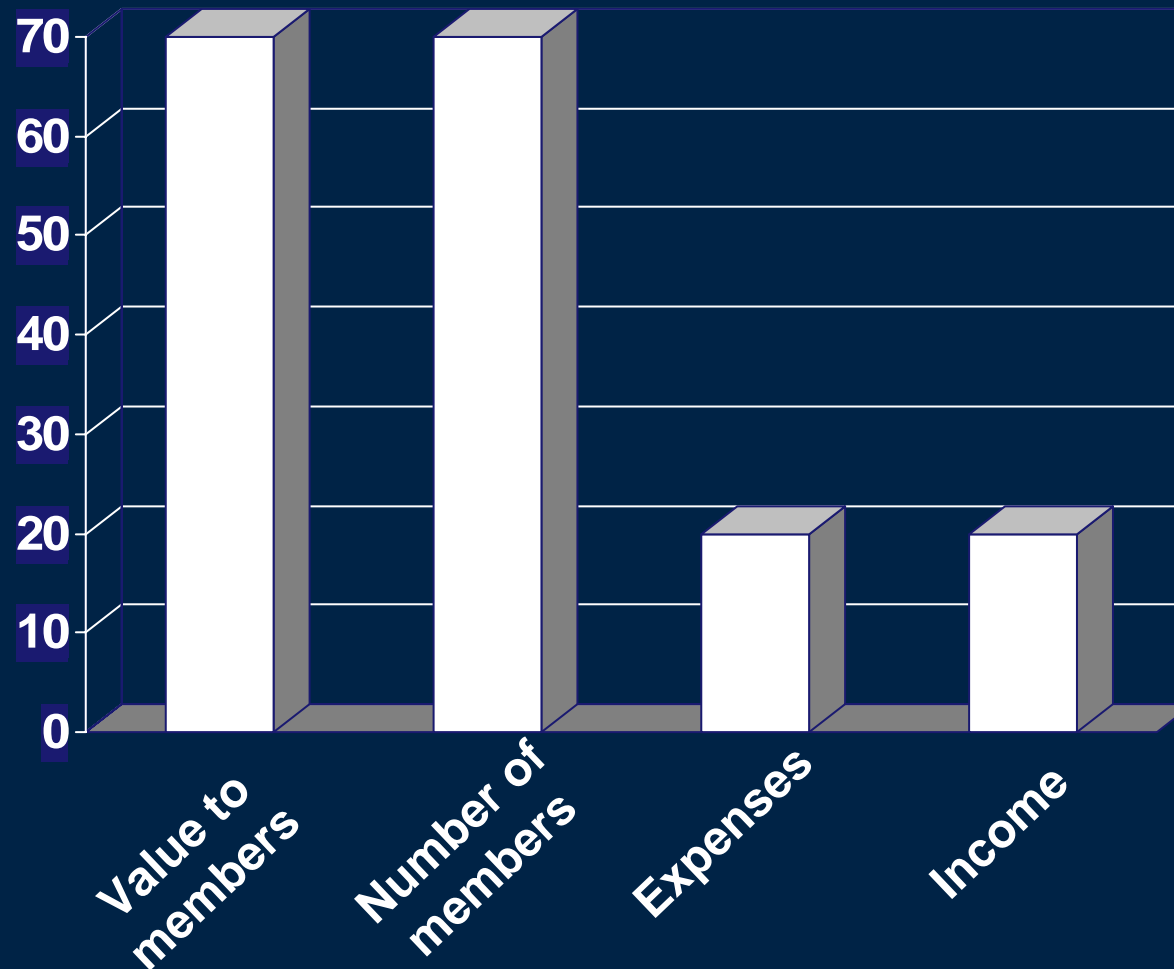


## Current Society Business Model – Paper Centric





## Future Society Business Model – Virtual Centric





# Revenue Model Options for Societies

## ❖ Free data model

- Provide indexes and images for free
- What draws people to this is the project – fund it with what resources?
- Why do you want to be free?
  - Price barrier can often chase away a number of people, drop off rates of 70-90%
  - People have to understand the mechanism
  - The revenue collection threshold has to be overcome before you start making money



# Revenue Model Options for Societies

- ❖ Objective is to drive costs as close to zero as possible, to do this you:
  - Increase your volunteer base with distance members
  - Partner with other non-profit entities
  - Take advantage of open source tools and resources
- ❖ If needed to stabilize at the start, you may need:
  - A sponsor
  - Advertising to cover costs
  - Patron contributions



## Example of a Free Model

- ❖ FreeBMD (England & Wales)
  - Creating an overall index to the nation-wide indexes to civil registration for births, marriages, and deaths
  - Index contains 126.7M records
  - Focused on the years 1837-1910
  - Estimated project completion in 2007
  - FreeBMD was established as a Trust in June 2002
  - Operates entirely with volunteer resources



# Revenue Model Options for Societies

## ❖ Pay-per-view or access model

- Provide index for free or lead generation to the cooperative
- Society can publish images or data directly or through the cooperative

## ❖ Benefits of a Cooperative

- Answers to technology needs
- Provide links to your society
- Provide revenue to your society for value added services



## Example of a Cooperative Model

### ❖ Federation of Family History Societies (England and Wales)

- 1 April 2005 Royalties earned by FFHS members were increased from 25% - 30%
- 75 Societies are contributing about 750K entries most months
- The service has nearly 60 million entries as of August 2005
- New services will be offered by overseas members of FFHS and Monumental Inscriptions will be posted by year end



## Tools to Support Genealogical Societies

- ❖ A tool to allow volunteers to index records from your area
- ❖ An organization that could post the images of the records you needed indexed by these volunteers
- ❖ A cooperative model that would provide the support and infrastructure to:
  - Provide free access, or
  - Generate revenue
  - Point people to your society

**CERTIFICATE OF DEATH**  
COMMONWEALTH OF GEORGIA  
Bureau of Vital Statistics  
STATE BOARD OF HEALTH

**File No.—For State Registrar Only.**  
**3163**

PLACE OF DEATH  
County of Whitfield

Municipality District of 629 4pm

Town of \_\_\_\_\_

City of \_\_\_\_\_

Registration District No. 629  
(For use of Local Registrar)

Registered No. 2  
(For use of Local Registrar)

(If death occurred in a Hospital or Institution give its NAME instead of street and number.)

FULL NAME Gertrude Crow  
(If unnamed child give surname preceded by "Unnamed")

Residence In City \_\_\_\_\_ Yrs. \_\_\_\_\_ Mos. \_\_\_\_\_ Days \_\_\_\_\_

**PERSONAL AND STATISTICAL PARTICULARS**

1 SEX  
MALE OR FEMALE  
female

2 COLOR OR RACE  
W

3 MARRIAGE STATUS  
1 SINGLE, 2 MARRIED, 3 WIDOWED, 4 DIVORCED  
married

**MEDICAL CERTIFICATE OF DEATH**

16 DATE OF DEATH March 2, 1919  
(Month) (Day) (Year)

	*File No.	*Male or Female	*Full Name: Given Names	*Full Name: Surnames	Race or Color
00111[1]	3163				
00112[1]					
00113[1]					
00114[1]					
00115[1]					
00115[2]					
00116[1]					
00117[1]					
00118[1]					
00119[1]					
00120[1]					

**Instructions**

**File No.**

Type the certificate number as it appears on the document.

**Note:** After you have typed the first file number, the computer will put in the next number for you. Always check it against the file number on the certificate in case a number was skipped or duplicated.

**Example:** 28094

**2 FULL NAME** *Mrs. Ellen* In City..... Yrs..... Mos.....  
 (If unnamed child give surname preceded by "Unnamed")

---

**PERSONAL AND STATISTICAL PARTICULARS**

**3 MALE OR FEMALE** *Female* (Write the word)  
**4 COLOR OR RACE** *white*  
**5 SINGLE, MARRIED, WIDOWED, OR DIVORCED.** *married* (Write the word)

**6 DATE OF BIRTH**  
*June* (Month) *1* (Day) *1892* (Year)

**7 AGE**  
*26* yrs *9* mon *2* ds  
 If LESS than 1 day, ..... hrs. or ..... min.?

**8 OCCUPATION**  
 (a) Trade, profession, or particular kind of work *Housewife*  
 (b) General nature of industry, business, or establishment in which employed (or employer)

---

**MEDICAL CERTIFICATE OF DEATH**

**16 DATE OF DEATH** *March* (Month) *2* (Day)

**17 I HEREBY CERTIFY, That I attended de**  
*Feb 23*, 19*19*, to *March*  
 that I last saw her alive on *March 1*  
 and that death occurred on the date stated above, a  
 The CAUSE OF DEATH\* was as follows:  
*Lobar Pneumonia*  
 (Duration)..... yrs  
 Contributory *Influenza*

Table Entry Form Entry Georgia Project Information

*File No.	*Male or Female	*Full Name: Given Names	*Full Name: Surnames	Race or Color
00111[1]	F			
00112[1]				
00113[1]				
00114[1]				
00115[1]				
00115[2]				
00116[1]				
00117[1]				
00118[1]				
00119[1]				
00120[1]				

**Instructions**

Male or Female [Sex]:  
 Type M for male, F for female, or U for unknown.  
 Note: Type U if the gender is not given and can't be determined by the name or other information on the certificate.  
 Example: M

**INK—THIS IS A PERMANENT RECORD.**  
**I be stated EXACTLY. PHYSICIANS should state CAUSE of OCCUPATION is very important. See instructions on**

Militia District of 629  
 or  
 Inc. Town of \_\_\_\_\_  
 or  
 City of \_\_\_\_\_ (No. \_\_\_\_\_) St.; \_\_\_\_\_ Ward) (If des a Hospit tion give stead o number.)

Registration District No. 629  
 (For use of Local Registrar)

2 FULL NAME Gertie Crow (If unnamed child give surname preceded by "Unnamed")  
 Residence In City \_\_\_\_\_ Yrs. \_\_\_\_\_ Mos. \_\_\_\_\_

---

**PERSONAL AND STATISTICAL PARTICULARS**

3 MALE OR FEMALE Female (Write the word)  
 4 COLOR OR RACE white  
 5 SINGLE, MARRIED, WIDOWED, OR DIVORCED. married (Write the word)

6 DATE OF BIRTH June 1, 1892  
 (Month) (Day) (Year)

7 AGE \_\_\_\_\_  
 If LESS than 1 day, \_\_\_\_\_ hrs. or \_\_\_\_\_

---

**MEDICAL CERTIFICATE OF DEATH**

16 DATE OF DEATH March 2  
 (Month) (Day)

17 I HEREBY CERTIFY, That I attended de Feb 23, 1919, to March that I last saw h. er alive on March 1 and that death occurred on the date stated above, a The CAUSE OF DEATH\* was as follows:  
Lobar Pneumon

*File No.	*Male or Female	*Full Name: Given Names	*Full Name: Surnames	Race or Color
00111[1]	F	Gertie		
00112[1]				
00113[1]				
00114[1]				
00115[1]				
00115[2]				
00116[1]				
00117[1]				
00118[1]				
00119[1]				
00120[1]				

**Instructions**

Full Name: Given Name

Type the first and middle name(s) of the person found in the Full Name field.

**Note:** Do not include titles or terms such as don't know, Miss, Jr., II. Only extract the term Mrs. if a female's first name was omitted and recorded as her husband's name. For instance: Mrs. Thomas Smith

**Example:** Rae

NOTE - THIS IS A PERMANENT RECORD. PHYSICIANS should state CAUSE OF DEATH as stated EXACTLY. PHYSICIANS should state CAUSE OF DEATH of OCCUPATION is very important. See Instructions on back of

**CERTIFICATE OF DEATH**  
 COMMONWEALTH OF GEORGIA  
 Bureau of Vital Statistics  
 STATE BOARD OF HEALTH

File No.—For State Registrar Only.  
3163

1 PLACE OF DEATH  
 County of Whitfield

Militia District of 629 4m  
 or  
 Inc. Town of \_\_\_\_\_

Registration District No. 629  
 (For use of Local Registrar)

Registered No. 21  
 (For use of Local Registrar)

(City of \_\_\_\_\_ (No. \_\_\_\_\_ St.; \_\_\_\_\_ Ward)

(If death occurred in a Hospital or Institution give its NAME instead of street and number.)

2 FULL NAME Gertie Crow  
 (If unnamed child give surname preceded by "Unnamed")  
 Residence In City Yrs. Mos. Days

**PERSONAL AND STATISTICAL PARTICULARS**

3 MALE OR FEMALE Female  
 (Write the word)  
 4 COLOR OR RACE white  
 5 SINGLE, MARRIED, WIDOWED, OR DIVORCED. married  
 (Write the word)

6 DATE OF BIRTH  
June 1, 1992  
 (Month) (Day) (Year)

7 AGE  
 If LESS than 1 day, \_\_\_\_\_ hrs. or \_\_\_\_\_

**MEDICAL CERTIFICATE OF DEATH**

16 DATE OF DEATH March 2, 1919  
 (Month) (Day) (Year)

17 I HEREBY CERTIFY, That I attended deceased from Feb 23, 1919, to March 1, 1919, that I last saw her alive on March 1, 1919, and that death occurred on the date stated above, at 9 a.m.

The CAUSE OF DEATH\* was as follows:  
Lobar Pneumonia

Place	*Place of Death: City	*Place of Death: County
00111[1]		
00112[1]		Spalding
00113[1]		Whitfield
00114[1]		Brooks
00115[1]		Wilcox
00115[2]		Lookup...
00116[1]		
00117[1]		
00118[1]		
00119[1]		
00120[1]		

\*Place of Death: County

Spalding

Whitfield

Brooks

Wilcox

Lookup...

**WRITE PLAINLY WITH UNFADING BLACK INK—THIS IS essential to the proper use of this form. AGE should be stated EXACTLY as it should be carefully supplied. Exact statement of OCCUPATION may be properly classified.**

7 AGE *June 1 1892*  
 (Month) (Day) (Year)

*26* yrs *9* mos *2* ds  
 If LESS than 1 day, ... hrs. or ... min.?

8 OCCUPATION  
 (a) Trade, profession, or particular kind of work *Housewife*  
 (b) General nature of industry, business, or establishment in which employed (or employer)

9 BIRTHPLACE (State or Country) *Tennessee*

10 NAME OF FATHER *John Anderson*

11 BIRTHPLACE OF FATHER (State or Country) *Texas*

12 MAIDEN NAME OF MOTHER *...*

that I last saw *her* alive on *...*  
 and that death occurred on the date stated above, at...  
 The CAUSE OF DEATH\* was as follows:  
*Labar Pneumonia*

(Duration) ... yrs ... mo

Contributory (SECONDARY) *Influenza*  
 (Duration) ... yrs ... mo

Is this death attributed to dangerous or unsanitary conditions or *no*

21 WAS AN AUTOPSY PERFORMED? *no*  
 (Signed) *G. R. Broadbridge*  
*March 9 1912* (Address) *Dalton*

\*State the DISEASE CAUSING DEATH, or, in deaths from VIOLENCE (1) Manner of Injury; and (2) whether ACCIDENTAL, SUICIDE, or SELF-DEFENSE.

Table Entry	Form Entry	Georgia Project Information	*Place of Death: County	Date of Death	*Name of Father: Given ...	*Name of Fat
00111[1]				<u>Jan 12, 1890</u>		
00112[1]						
00113[1]						
00114[1]						
00115[1]						
00115[2]						
00116[1]						
00117[1]						
00118[1]						
00119[1]						
00120[1]						

**Instructions**

Name of Father: Given Names

Type the first name of the father as found on the certificate.

Note: Do not include titles or terms such as don't know, unknown, Jr., or II.

Example: Ransom

**COMMONWEALTH OF GEORGIA**  
Bureau of Vital Statistics  
**STATE BOARD OF HEALTH**

**3163**

PLACE OF DEATH  
County of Whitfield

Registration District No. 629  
(For use of Local Registrar)

Registered No. 4  
(For use of Local Registrar)

St. ; \_\_\_\_\_ Ward) \_\_\_\_\_

FULL NAME Gertie Crow  
(If unnamed child give surname preceded by "Unnamed")

Residence In City \_\_\_\_\_ Yrs. \_\_\_\_\_ Mos. \_\_\_\_\_ Days \_\_\_\_\_

(If death occurred in a Hospital or Institution give its NAME instead of street and number.)

**PERSONAL AND STATISTICAL PARTICULARS**

1 MALE OR FEMALE <u>Female</u> <small>(Write the word)</small>	4 COLOR OR RACE <u>white</u>	5 SINGLE, MARRIED, WIDOWED, OR DIVORCED. <u>married</u> <small>(Write the word)</small>
----------------------------------------------------------------------	---------------------------------	-----------------------------------------------------------------------------------------------

DATE OF BIRTH \_\_\_\_\_

**MEDICAL CERTIFICATE OF DEATH**

16 DATE OF DEATH March 2, 1919  
(Month) (Day) (Year)

17 I HEREBY CERTIFY, That I attended deceased from Feb 23, 1919, to March 1, 1919  
that I last saw her alive on March 1, 1919

Table Entry Form Entry Georgia Project Information

	*Place of Death: City	*Place of Death: County	Date of Death	*Name of Father
00111[1]			Jen 12 1890	John
00112[1]				
00113[1]				
00114[1]				
00115[1]				
00115[2]				
00116[1]				
00117[1]				
00118[1]				
00119[1]				
00120[1]				

**Quality Check**

Date of Death

Approve: Jen 12 1890  
*Invalid date format*

Enter new value Intentionally left blank

Auto-advance



# Virtual Tools to Support Society Goals

Virtual Tools	Google Key Words
<p><b>Short-Run Publishing</b> <i>Producing Monographs or other bound works without overproducing or holding inventory</i></p>	<p>On-Demand Publishing; Print on demand</p>
<p><b>E-mail Newsletters</b> <i>Sending e-mails out to large groups of people (i.e., 200+), managing subscriptions to newsletters, etc.</i></p>	<p>E-Mail List Management</p>
<p><b>Webinars</b> <i>A shortened form of “Web Seminars,” a lecture with video, audio, perhaps slides, that anyone, anywhere can attend.</i></p>	<p>Webinars; Web Seminars; Audio Seminars</p>



# Virtual Tools to Support Society Goals

Virtual Tools	Google Key Words
<p><b>Podcasts</b> <i>Circulating a recorded message or lecture to your members – can even be arranged as a subscription</i></p>	<p>Podcasting; Podcast Authoring</p>
<p><b>Members Only Section on Website</b> <i>Making certain that content, files, etc. are only available to members</i></p>	<p>Subscription Management Tools</p>
<p><b>Search Engine Optimization</b> <i>Making sure you're listed as high as possible on Google</i></p>	<p>Keyword Managers; Search Engine Optimization; Web site Promotion</p>



# Virtual Tools to Support Society Goals

Virtual Tools	Google Key Words
<p><b>Placing Society Databases Online</b></p> <p><i>Using the web to publish genealogical databases or other useful content</i></p>	<p>Web Publishing; Web Database Publishing; Subscription Management Tools</p>
<p><b>Surveying Members Interests or Opinions</b></p> <p><i>Getting a feel for your society's members needs, wants and gathering feedback</i></p>	<p>Web Surveys; Free Web Surveys</p>



## Related Sessions at this Conference

- ❖ **W-23** Indexing Projects for Family History Societies; *Stephen J. Valentine*
- ❖ **W-30** Digital Rights Management within a Society; *Ransom H. Love*
- ❖ **T-53** The Impact of Technological and Economic Factors on the Future of Genealogy; *Jay L. Verkler*



## Conclusion – The Case for Change

- ❖ The current society model is dying
- ❖ The new society models open a world of opportunities in the virtual arena
- ❖ Focus on your society's strengths and exclusivity
- ❖ Familiar with technology ≠ comfortable with technology
- ❖ In short, ***Go Virtual or Perish!***