

Relevant Society Leadership in the 21st Century

Texas State Genealogical Society Leadership Forum 2021

David E. Rencher, AG®, CG®, FUGA, FIGRS

Introduction

All Volunteer Organizations (AVO's) are the lifeblood of society, although they are rarely recognized for the incredible contributions they make. Your society is among them—you provide a service to the community that is largely unheralded. You preserve the fabric of the history and family history of America and create access to the stories that bring people to life in the minds and hearts of their descendants.

Leading such an organization is no easy task and one not to be taken lightly. Perhaps, little did you recognize at first how much of your time your society volunteer efforts would consume. So too, however, did you realize how much satisfaction it would bring to you as you served others in a cause you find so rewarding. Simply put, we love those whom we serve.

Changing Leadership Needs

Perhaps your society has thrived for several decades or even longer. At this stage, your board of directors is satisfied with the way things are going and see no need to change. However, it is unlikely that the changing demographics in the makeup of what constitutes a family unit, the radically shifting purchasing habits of a new generation, and the shift to working in a distributed workforce entirely from home, or a hybrid mix of the office and home are all having an effect on how your society will meet the needs of its members.

If your society meetings are focused on how to trim expenditures and cut costs and those measures are leading to a diminishing set of offerings to members, then your society is in a spiral of decline that will simply continue to gain momentum until you cease to exist.

Society Assessment

To meet these changing needs, leaders in today's genealogical societies need to be keenly aware of why their society exists. Every board needs to do a self-evaluation of why the society was organized at the start and are those factors still relevant today? Further, are board members still trying to address the needs in the same manner they did when the society was formed?

Strengths

- Strong ability to mentor volunteers to take on new responsibilities
- Quality publications
- Valued working relationship with the Local public library

Action plan to build on strengths

- Mentor the mentors – help senior volunteers become better mentors
- Submit publications for recognized awards and then promote the achievement
- Build a particular part of the collection

Weaknesses

- Membership fluctuates from year-to-year, trending downward
- Find quality content for publications
- Working productively with board members who disagree and bring contention into board meetings

Action plan to address weaknesses

- Identify the triggers that have caused the change and address them specifically
- Appoint a team to assist the editor find and solicit articles/content by networking within the field
- Meet with the board members with whom there has been disagreement and discuss ways of disagreeing more constructively in the future

Succession Planning

Most agree that succession planning in the corporate arena is a well-founded principle and it is regularly practiced in successful companies. However, when it comes to running genealogical or historical societies, it is frequently overlooked. In the same way that a basketball or other sports team needs bench depth, a society needs the same. What happens when a key society leader suddenly moves or is no longer able to serve? Who steps in and fills the void created by their absence?

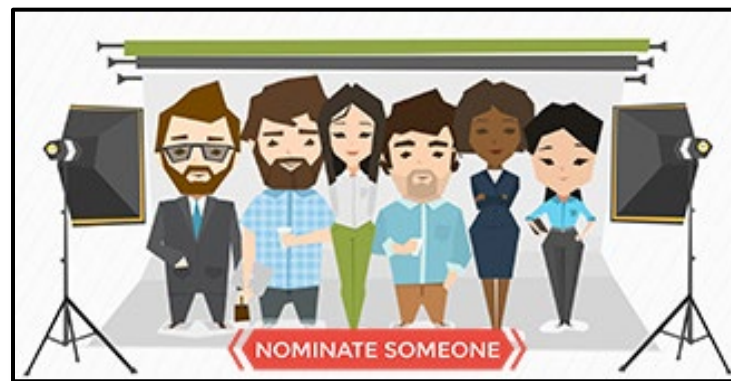
Some societies have simply gone out of existence when the current president was no longer willing or able to serve and there was no one willing to step in and take their place. When this occurs, is there someone even designated to fill the role as the acting executive until an appointment or election can fill the vacancy?

Frequently, there are key society officers that fill a variety of roles within the society. They seamlessly skip back and forth between roles in such a way that it is imperceptible to most when they are serving as a volunteer within the organization and when they are serving as a leader of the organization. For example, at a monthly society program, they may be in the parking lot directing traffic until the time for the meeting to start and then walk into the building, onto the stage and take their place at the podium as president to start the meeting. At what point did the cape and mask come on and off?

What happens when someone wants a particular job within the organization, but the remainder of the board is unanimous that they are not fit or qualified for the job? Feelings are hurt, relationships often damaged, and the volunteer/member is usually lost to the organization for good. To prevent this, grooming candidates for your succession plan is in order.

Nominating Committee

The nominating committee chair and members are the key to success within any organization. It is their task to identify qualified candidates to fill open positions on the board of directors and not just fill the seats with warm bodies, coaching them that “you really don’t have to do much, we just want you on our board.”



The committee is to set expectations for service and define what a good job looks like in each position. The committee should perform an assessment of the skills needed in the upcoming election and the skill sets that are being lost by outgoing members. If the skills are still needed, you refill the position with those skills. If not, you identify your current needs and go after those skills among the nominated candidates.

Here's an example of how one board mapped out its needs:

Name of current board member or potential board member	Sample Board Composition Matrix ¹																	
	Qualities we seek																	
	Constituency or affiliation					Skills/experience						Demographics and Background						
	Corporations	Government	Small business	Medical	Churches	Finance and accounting	Medical	Human Resources	Legal	Nonprofit management	Marketing and PR	Male	Female	African American	Asian Pacific Islander	European and White	Hispanic and Latino	Native American
Kathleen	X				X		X					X	X					
Carlos		X			X				X		X					X		
Renée			X	X			X				X					X		
Sylvia		X			X		X			X		X			X			
Ben	X							X			X				X			

Diversity on the Board

Today, more than ever, the reflection of our organizations need to represent all of those in the community we seek to serve. The question of diversity on a board is frequently a topic of discussion. Remember that in seeking diversity on the board, you are asking members to serve because they have all of the relevant skills you need, not because they represent one particular ethnic community. The fact that they may also represent one of the ethnic communities in your area is an added bonus because their viewpoints will widen the perspective of the entire board to the opportunity to better serve that groups needs and perhaps the unique challenges that tracing their family may be in genealogy.

Board Leadership

Leading a society today brings a different set of challenges than may have been faced by our predecessors. It wasn't that their task was any easier, it was just different. To remain relevant in the leadership arena, regardless of the era, one must constantly be asking the right questions about the constantly changing dynamics within society. What's popular? What isn't popular? What size should our board be? Do we need to add new committees to address new areas of focus? Have we reached the point where we need a paid executive director? Do we get serious about fundraising in the non-profit space?

Society leadership needs to be clear about the two roles every board member has:

- Governance – they look at the body as a whole and act accordingly when casting their votes in favor or against initiatives for the organization. Personal agendas must be set aside when acting in this role.

1. Jan Masaoka. *The Best of the Board Café* 2d. (Saint Paul, Minnesota: Fieldstone Alliance, 2009) p. 147.

- Support – they act as individuals to support the organization by volunteering for tasks, committees, and assignments to accomplish the work of the society.

Commonly, leaders in societies often feel that they must *do everything!* Before long, they burn out and confide in other members that they can no longer carry the load they think they were called upon to bear. In reality, they have kept another member from enjoying the satisfaction of serving and contributing to the success of the organization.

In the governance role, the board members must act in a manner that secures the fiduciary strategy of the organization and is above reproach. Society funds, whether paid in membership fees, products, services, or donations are to be used solely for the benefit of the organization and not for personal gain. Successfully following the governance strategy will ensure that the organization can meet its goals to do its work; ensure that there are funds in reserve as contingencies surface; and is in harmony with the ethics and values of the society.



In the support role, everyone participates at some level to move the vision of the society forward and realize the success outlined for the members. Frequently, this involves a number of different assignments and times when it's "all hands on deck" to manage a seminar or pull together a major publication for the society.

Society Dashboards

Leaders today need to be able to see where the organization is going in real time. Creating a society dashboard can give guidance to what's happening within the organization and if it is realizing its goals month-by-month or quarter-by-quarter. Likewise, it's an essential tool to allow other members of the board to see what is happening and the success and difference that you are making. Alternatively, it can also be an early detection to something that needs immediate corrective action.

Your society dashboard could include indicators such as:

- Number of total members
- Number of new members this month
- Sales of society publications
- Progress toward fundraising goals by quarter
- Volunteer hours donated
- Marketing initiatives launched
- Conference or event registrants
- Social media reach

Conclusion

The success of your organization hinges on the ability of its leaders to adapt to change, recognize the changes that are coming, and unifying its members around a shared vision of where the organization is going or could go if they were united. It focuses on the customer and the experience that the customer is having—and then sets out to exceed the member's expectations. When you do that, you have repeat members year-after-year because they enjoy the services you provide and they are committed to "your society brand" and strategy. They in essence, sell the organization to others and your society continues to thrive in a shifting landscape.