



Agenda



- Structure
 - How are we structured currently?
 - How could we adjust the structure for the future?
- Strategies for Effective Volunteer Engagement
 - Why should we worry about volunteers?
 - The new generation of volunteers
 - Recruiting and Managing
 - Handling underperforming volunteers
- Lots of Discussion



Texas State Genealogical Society

Impacting genealogy in the Lone Star State

About Us ▾ Programs ▾ Publications ▾ **Conference/Events ▾** Membership ▾ Partner Societies ▾

Contact Us

2022 TxSGS Family History Conference >

Society Forums >

Society Leadership Forum: Models for Organization

2022 Call for Presentations

Society Leadership Forum: Program Planning II

Events Calendar

Society Leadership Forum: Developing & Using Metrics for Your Society

Society Leadership Forum: September 2021

TxSGS Genealogical Society Forum: (Re)Launching Your Society

TxSGS Genealogical Society Forum

Genealogical Society Leadership Forum

Society Leadership Forum: Models for Organization

A Virtual Event

The skills required to manage a successful society (and a lot!) in recent years.

Covid has changed the habits of meeting participants. Just expecting participants (and volunteers) to show up may never return. If your society is not meeting the expectations of participants with Virtual, Hybrid and Recordings your events may not be as successful as they were in the past.

Finding volunteers in this new environment is also proving to be a challenge for many organizations. Many existing members lack vital skills. Attracting and retaining new volunteers who possess those vitally needed skills is challenging.

<https://www.txsgs.org>

- Has links to every website referenced in our presentations.
- A link to the recording of this meeting will be available here.



Virtual!

2022 TxSGS Family History Conference

**10 Presentations with
Q&A by Speakers**

32 On-Demand Recordings

**Bonus Recordings
and More!**

Available for replay for 90 days

Registration Opens in July



UNLOCK 

Your Past

November 4-5, 2022

2022 TxSGS Family History Conference

www.TxSGS.org #txsgs

Be a Sponsor or Exhibitor!

The screenshot displays the Whova interface for the 2021 TxSGS Family History Conference (Oct 1-2, 2021). The main content area features a video player for the Mid-Cities Genealogical Society, which has 136 visits and 39 likes. The society's profile includes contact information (k.merk@sbcglobal.net, https://txmcgs.org, Kelli Merk, 302 members) and a "Deals and Offers" button. A description states the society was founded in 1978 and is a non-profit member of the Texas State Genealogical Society and the National Genealogical Society. It also mentions in-person meetings on the third Monday of each month at the Bedford Public Library. A "Booth Staff" section lists Kelli Merk as the webmaster with a "Send Message" button. The right sidebar shows a chat window with several messages from attendees.

Whova Whova Guides Organizing your own event? Tony Ha

2021 TxSGS Family History Conference Oct 1 - 2, 2021 Sponsor level Gold San Antonio Genealogical Society

Home Back to Exhibitor List Mid-Cities Genealogical Society

Agenda Attendees (11) Community (1.2k) Messages (2) Photos Win a Prize

Exhibitors Resources

Mid-Cities Genealogical Society 136 Visited 39 likes

k.merk@sbcglobal.net https://txmcgs.org Kelli Merk 302

Deals and Offers

The Mid-Cities Genealogical Society was organized in June, 1978, and currently has approximately 60 members, primarily from the communities of Hurst, Bedford, Euless and Irving, Texas. We are a non-profit, tax-exempt corporation and a member of the Texas State Genealogical Society and the National Genealogical Society.

We are now meeting in person! Please join us on the third Monday of each month at 2pm at the Bedford Public Library (2424 Forest Ridge Dr., Bedford, Texas). For information about joining, please see our Join Us page. Visitor's welcome!

Booth Staff

Kelli Merk Webmaster Mid-Cities Genealogical Society Send Message

Feedback to Whova Organizer Tips About Whova

Chat

GLad to see a society in Mid Cities

Jan Wilkins Good to know about this resource.

Oct 2, 2021 12:40 PM

Rhonda Wilhite Love the video in your booth

Oct 2, 2021 3:51 PM

Tina McGuffin Thanks for your support!

Rebecca Jones Looks like a very active society!

Oct 3, 2021 3:51 PM

Janet Absher Nice video and you all look to be very busy!!

Oct 3, 2021 8:36 PM

Paula Perkins Wonderful organization and great group of people.

Write a reply

<https://www.txsgs.org/2022-conference/sponsor-exhibitor/>

TIPS: TxSGS Impacts Partner Societies

	2022 Exhibit Space Price	2022 TIPS Price *
Partner Society	\$ 75.00	\$ 50.00
Non-Member Society	\$100.00	
Commercial Vendor	\$125.00	

- Register and get your society code:
 - <https://forms.gle/Q9E5ox4p7xhAmk7v9>
- Receive a \$25 discount when you register as an exhibitor
- Receive \$10 for every Standard or All In One registration that specifies your code



LONE STAR
Family Trails



Texas State Genealogical Society
PODCAST



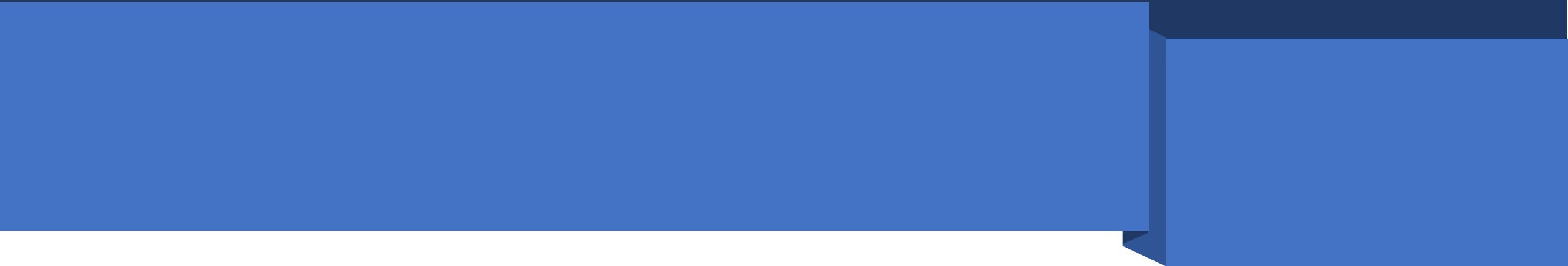
Texas State Genealogical Society
P O D C A S T

- #101 – The Texas Collection and University Archives at Baylor University.
- #102 – TxSGS Lone Star Family Trails Podcast – SAGHS Library
- #103 – Lone Star Family Trails – The Southwest Collection at Texas Tech University



<https://www.aihr.com/blog/organizational-design-models/>

State, Federal & Consumer Requirements



501(c)(3)

- A Federal Tax Designation
- Federal Employer Identification Number (EIN)
 - Also known as a 'federal ID number'
 - Like a Social Security Number
- Used to identify your organization when tax documents are filed
- Use to avoid paying sales tax for society equipment & supplies

[https://www.wikihow.com/Start-a-501\(c\)\(3\)-Nonprofit-Organization](https://www.wikihow.com/Start-a-501(c)(3)-Nonprofit-Organization)

Texas Business Code Requirements

- File a Certificate of Formation with the Secretary of State
 - Must provide a copy of your Form 990
 - At least three officers
 - A President
 - A Secretary
- Cannot be the same person!
- File an informational report not more than once every four years upon request by the secretary of state

Secretary of State John B Scott – ‘Nonprofit Organizations FAQs’

<https://www.sos.state.tx.us/corp/nonprofitfaqs.shtml#:~:text=The%20Texas%20Business%20Organizations%20Code%20requires%20a%20nonprofit%20corporation%20to,be%20known%20by%20other%20titles>



Q Taxable Entity Search

Search


Tax ID
Use the 11-digit Comptroller's Taxpayer Number or the 9-digit Federal Employer's Identification Number.

OR

Entity Name

OR

File Number
Use the File Number assigned by the Texas Secretary of State.

I'm not a robot 
reCAPTCHA
Privacy - Terms

 Search

 Reset

<https://mycpa.cpa.state.tx.us/coa/coaSearchBtn>

Annual Reports*

- **Federal**

- IRS 990 ("Return of Organization Exempt From Income Tax")
 - 990-N for organizations with annual gross receipts less than \$50,000
- 1099-NEC – For payments over \$600 to non-employees
 - W9 - required at time of payment

- **State**

- Form 802 (if officers have changed)
- Informational report (when requested)
- Sales Tax report

*Note: There are other requirements (annual reports, etc.). Refer to qualified lawyer or accountant to determine the specific requirements for your organization.

Follow Up Required?

- **Central Texas Genealogical Society** – No Federal or State registration
- **Collin County** – Two Taxpayer ID's
- **Dallas Genealogical Society** – Two Taxpayer ID's (New Address)
- **East Texas Genealogical Society** – “Not set up for franchise tax”
- **Erath County** - No Federal or State registration
- **Genealogy Friends of Plano Libraries** – No Federal or State registration
- **Heritage Ranch Genealogical Society** – No Federal or State registration
- **Genealogical Society of Kendall County Texas Inc.** – No State registration

Follow Up Required?

- **North Collin County Genealogical Society** – No State registration
- **Texas Czech Genealogical Society** – No State registration
- **San Antonio Genealogical & Historical Society** – No State registration
- **Texas Bay Area Genealogical Society** – No State registration
- **The Humble Area Genealogical Society** – No Federal or State registration
- **Van Zandt County Genealogical Society** – Franchise Tax Involuntarily Surrendered
- **Walker County Genealogical Society** – No State registration
- **West Houston Area Genealogy Society** – No State registration

PCI Requirements

Payment Card Industry Data Security Standard

- 12 requirements businesses must follow to keep their customers' credit card data safe.
- Failure to comply with these standards could result in fines and penalties.



A Guide to PCI Compliance for Small Business Owners

<https://www.entrepreneur.com/article/432304>

Models of Organization

- Currently:
 - Volunteer board of directors from community in which we operate
 - We manage and evaluate ourselves without any oversight
 - Why do we do it this way?
 - Because that is the way it has always been done!
 - Consensus model
 - Do I dare disagree with others? Might end up with more work!!!
 - Focus on Governance, Administration and Programming
 - Are there enough volunteers to meet the needs of the organization?

Typical Organization of Genealogical Societies

- President – Does all the work (easier to do it myself than have others involved)
- Vice President – Often responsible for Programming
- Secretary – take minutes and file them
- Treasurer – manages dues, sometimes helps to set fees and budget
- Directors at large – take on responsibilities of marketing, newsletter, membership, webmaster, event planning, publications, or absolutely nothing but attend the meetings

Is this structure meeting the needs of our society?

- Maybe!!
- Make sure the board is not a hindrance to your mission
- What is your mission?
 - Preservation
 - Education
 - Networking
 - Resource for others doing research in our area
 - A place to go on Thursday evenings
- Let's build an organization that has the focus we need!

<https://www.cloudave.com/31741/meeting-requirements-vs-meeting-needs/>



We come from business and their organizational models

- Hierarchical - grouped by function, geography, product
- Line organizational (Chain of Command)
- Flat structure (no middle management)
- Team-based organization – project work
- And Many more



- Do any of these really work for non-profits?

<https://www.alamy.com/stock-photo/organizational-structure.html>

Let's begin by answering tough questions

- Which positions **MUST** we have? And what are the required skills for those positions?
 - President
 - Vice-President
 - Treasurer
 - Secretary
- Could 2 people share a single position? Covering for each other in work and absences.
- Consider the requirements for a non-profit in the state of Texas (3 positions)

Could we have a team-based environment?

- Robson Ranch Genealogy Club (prior to 2022)
 - President, VP, Secretary, Treasurer
 - President did everything – no one wanted the position
 - Limited to residents of Robson
 - Charter requires President, Secretary and Treasurer
 - What did we do?
 - Recommended an experiment for one year



Robson today

- 10 individuals on the board (actually only 9)
 - President
 - Secretary
 - Treasurer
 - Programming (2 share)
 - Communication
 - Newspaper releases
 - Special Projects
 - Genealogy Window
 - 10th position is open (person lasted two weeks and realized work was required)

Bylaws Revised January 2022

Article 6 – Duties of Officers

The duties of the Officers shall include, but are not restricted to, those set forth in the Society's operations manual. Each Officer shall appoint, as needed and with the approval of the Board of Directors, aides to assist in the accomplishment of these duties.

Section 6.1 – President

The President shall be the Chief Executive Officer and the official spokesperson for the Society; shall affix the official signature for the Society on all legal documents; shall provide general supervision of the Society activities; shall preside at all general business meetings and Board of Directors meetings of the Society; and shall be an ex-officio member of all committees except the Nominating Committee. The President shall appoint advisors to the Board as specified in Article 8, Section 8.1.2, and all committees and their chairs as are necessary to carry on the work of the Society. The President shall write an annual report to the membership for publication in the DGS Newsletter.

Section 6.2 Vice President

The primary responsibility of the Vice President is scheduling and managing seminars presented by the society. This individual is also responsible for communicating with SIG leaders, library scheduling and coordination, and arranging for hospitality at Society events.

In the absence or incapacity of the President, the Vice President shall temporarily assume the duties of the President at the request of the President or majority of the Board of Directors.



DALLAS GENEALOGICAL SOCIETY
EXPLORE YOUR FAMILY HISTORY WITH US

DGS Bylaws: 1994 vs. Now

1994	2022
President	President
Executive Vice President	Vice President
Recording Secretary	Secretary
Treasurer	<i>Director of Finance</i>
Director of Volunteer Coordination	Director of Volunteer Coordination
Vice President for Membership	Director of Membership
Director of Publications	Director of Publication Content
Director of Publicity and Public Relations	<i>Director of Marketing</i>
Vice President for the DGS Newsletter	Newsletter Administrator

DGS Bylaws: 1994 vs. Now

1994	2000	2011	2016	2022
The Director of Special Interest Groups	xxx			
Parliamentarian	Parliamentarian	xxx		
Vice President for the Dallas Quarterly	Vice President for the Dallas Journal	xxx		
The Director of Sales	The Director of Sales	The Director of Sales	xxx	
Library Liaison	Library Liaison	Library Liaison (Advisor)	Library Liaison (Advisor)	xxx
Director of Correspondence and Mailings	Director of Correspondence and Mailings	Director for Printing & Distribution	Director for Printing & Distribution	xxx
Vice President for Education	Vice President for Education	Director for Education	Director for Education	xxx

DGS Bylaws: 1994 vs. Now

1994	2022
President	President
Executive Vice President	Vice President
	Seminar Administrator
	General Meeting Administrator
Recording Secretary	Secretary
Treasurer	Director of Finance
Director of Volunteer Coordination	Director of Volunteer Coordination
Vice President for Membership	Director of Membership
Director of Publications	Director of Publication Content
Director of Publicity and Public Relations	Director of Marketing
Vice President for the DGS Newsletter	Newsletter Administrator
	Immediate Past President
	Director of Information Technology
	Website Administrator
	Director at Large



DALLAS GENEALOGICAL SOCIETY
EXPLORE YOUR FAMILY HISTORY WITH US

Executive Committee	
President	Elected
Vice President	Elected
Secretary	Elected
Immediate Past President	Inherited
Director of Finance	<i>Appointed</i>
Director of Information Technology	<i>Appointed</i>

<https://dallasgenealogy.org/dgs/about/society-documents/>

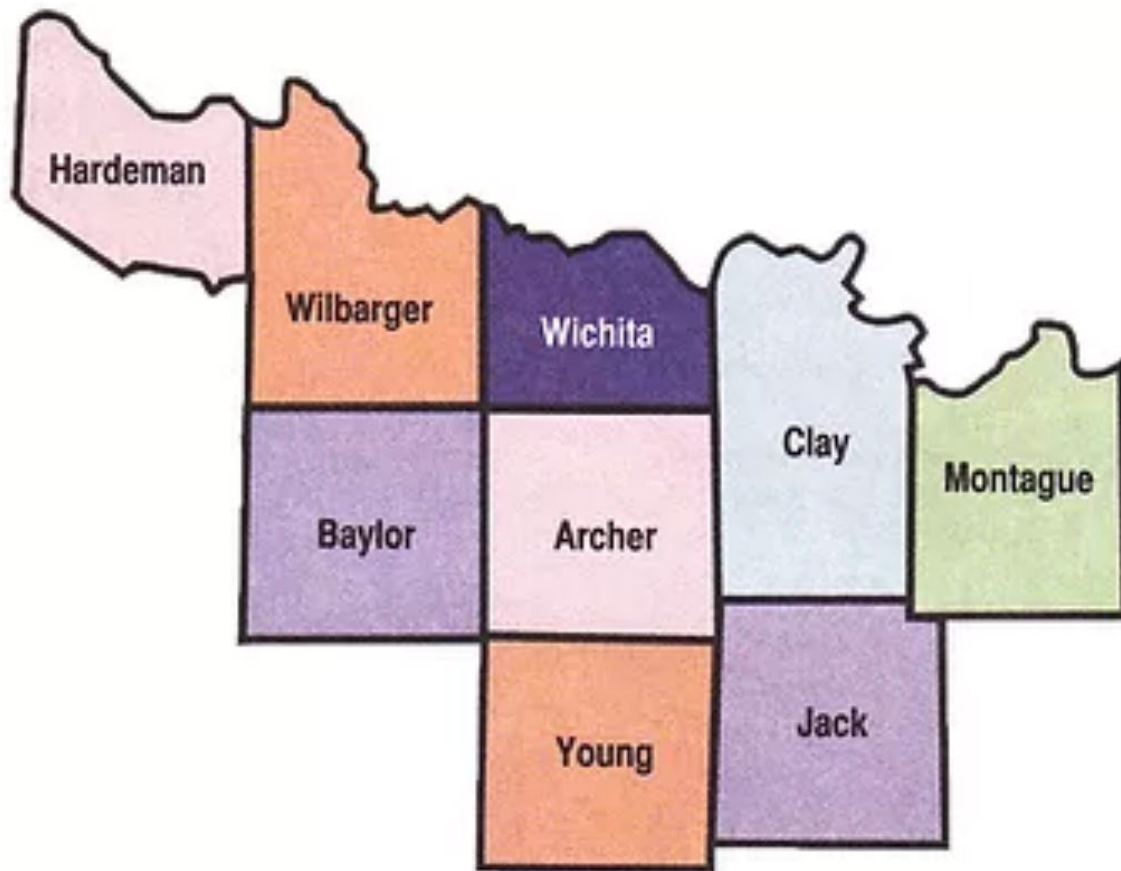
Regional Focus



Regional Focus

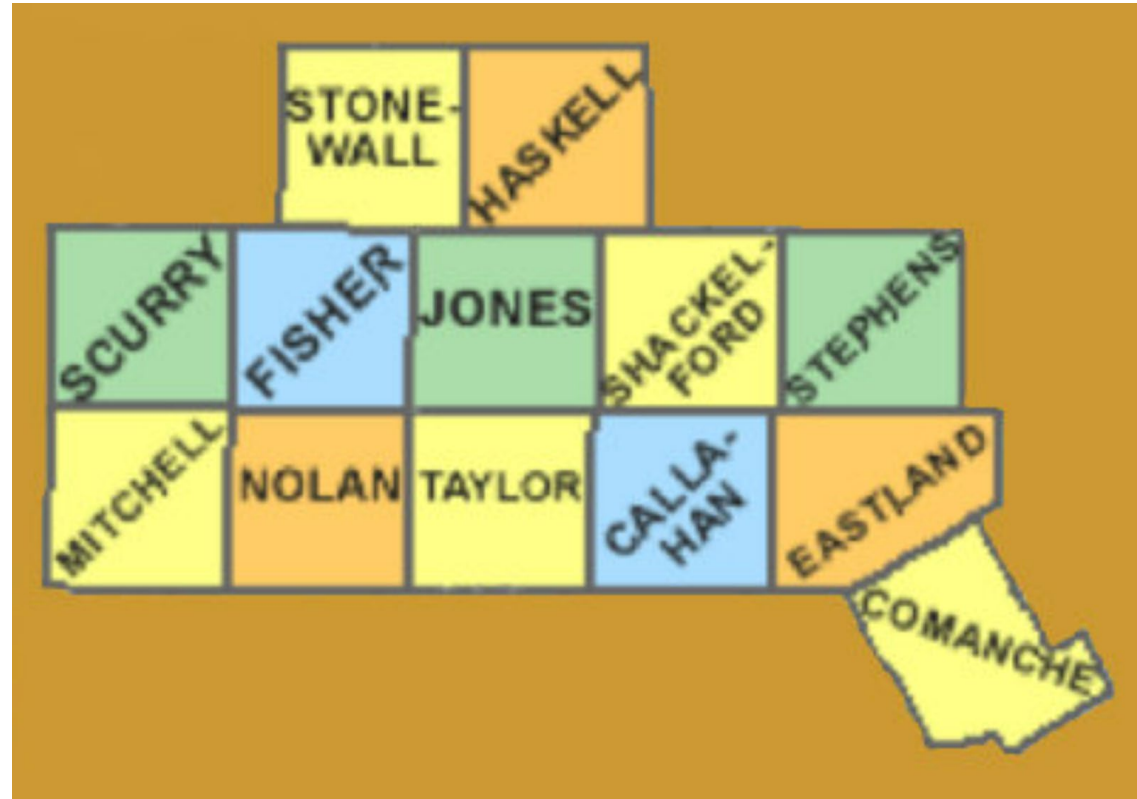
North Texas Genealogical Association

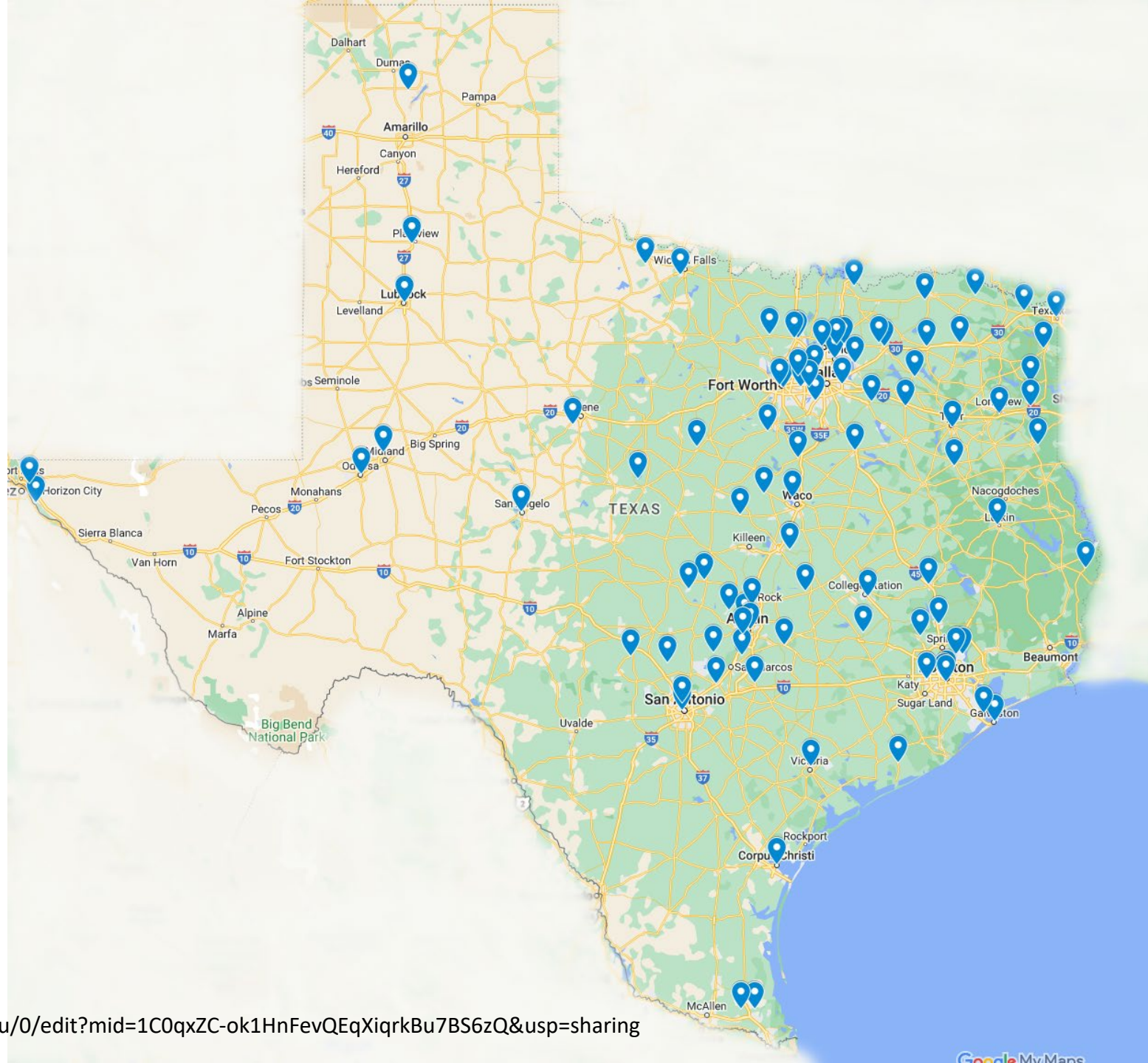
Trail Tracers



Regional Focus

WEST TEXAS GENEALOGICAL SOCIETY





<https://www.google.com/maps/d/u/0/edit?mid=1C0qxZC-ok1HnFevQEeqXiqrkBu7BS6zQ&usp=sharing>



Organization Delegates

⚙️ SETTINGS

[COMMUNITIES](#) / [DISCUSSION](#) / [TOPIC THREAD](#)

Community Home

Post **245**

Library **5**

Blogs **0**

Events **0**

Members **221**

◀ BACK TO DISCUSSIONS

[Expand all](#) | [Collapse all](#)

sort by thread ▾

BOARD ORGANIZATION & OPERATIONAL CHANGES

Following ★



Tony Hanson 27-05-2022 08:18 AM

[I would like to hear how societies are changing the way they are structured/organized and/or about o...](#)



Margaret Melaney



Log in

Join

Enter search string

Home [Calendar](#) [Programs](#) [Research](#) [Members](#) [Support Us](#) [About](#)

Home

Welcome to SMC GS

Notices

Next monthly meeting

For more information about our monthly meetings [click here](#).

Upcoming public events

[Field Trip](#)

29 Jul 2022 10:00 AM • 2200 Broadway, Redwood City, CA 94063

[CANCELLED](#)

12 Aug 2022 10:00 AM • Cañada College Library

[National Register of Historic Places](#)

24 Sep 2022 10:30 AM •

[Using Maps for Genealogy](#)

22 Oct 2022 10:30 AM •

We had a picnic!



Shortcuts

[Events](#)

[News](#)

[Databases](#)

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[Facebook](#)

[eNews signup](#)

<https://www.smcgs.org/>

Officer Positions

- President
- Vice-President Operations
- Vice-President Marketing
- Secretary
- Treasurer
- Past President
- **Education Team Leader**
- **Membership Team Leader**
- **Library Team Leader**
- **Technology Team Leader**

“We threw out the old job descriptions”

- We're making them as generic as possible now so that we don't have to constantly rewrite our bylaws as the needs of the society change
- We've expanded the purview of each team to give them much more flexibility in how they operate.
- If the education team doesn't feel meetings aren't the way to go, they can do seminars, field trips, workshops, special interest groups, chat rooms, etc.

Tips

- **Ask for input**

- The person suggesting the activity is then charged with making all the arrangement. But they only have to do it once a year - and they learn as well from the interaction.

- **Make it fun**

- People on the teams make friends.

Tips

- **Make it easy**

- No one takes on full responsibility, and there's always a backup.

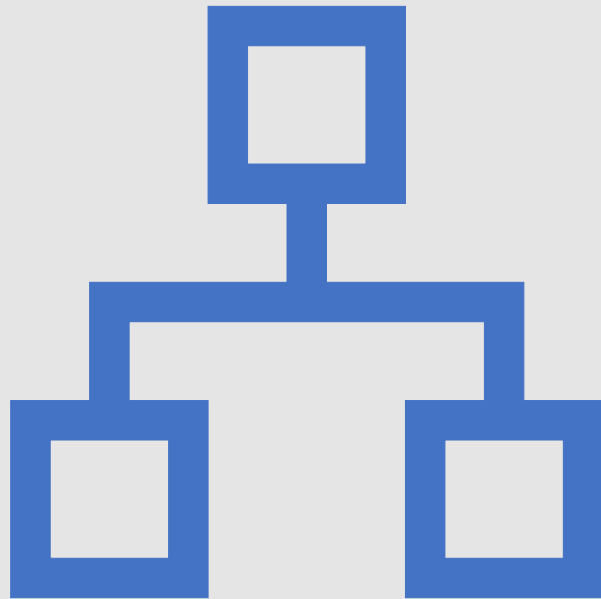
- **Make it flexible**

- One person from each team attends the board meetings. But it doesn't have to always be the same person.

Bottom line

- Start thinking of ways in which you can serve each member of your society.
- Identify their talents, bring them into the group, and acknowledge the role they play.
- **A fully engaged society of 50 members is a lot more interesting than a disconnected society of 2000.**

Other ideas



- Could you have virtual board members?
- Could you operate without anyone in charge?
- What positions could be shared?
- Could be have a board of trustees (or a group of concerned members) that provides feedback to the executive committee a couple of times a year?

Things to keep in mind

Many do not like change!

Be transparent with the change

Don't hide the reason why change is necessary

Be Flexible and ready to change when culture changes

Most volunteers don't want a job "forever"

Use job descriptions to better define what you are doing

Mission Charters

- Consider creating one for each Board Position or Team
- Components
 - Responsible to
 - Key Objectives
 - General Duties
 - Specific Duties for This Position



Poll

- Does your society have job descriptions for your volunteers?
- Do you have job descriptions that you would be willing to share?
 - Send them to: Tony Hanson – membership@txsgs.org
 - They will be posted on the event website

Strategies for Successful Volunteer Engagement



Let's
establish
reasons why
we are here
discussing
this topic!

There have been shifts occurring that effect who and how individuals volunteer:

- Desire for more Flexibility
- Baby Boomers towards Generation Y
- Face to Face to (COVID) Technology
- Creation of Knowledge Worker
 - Want to be engaged
 - Wants to make decisions
- Looking for Short-term Commitments

Copyrighted Material

"Eye-opening and thought-provoking...equally beneficial to business and volunteerism." ZIG ZIGLAR

THE NEW BREED

SECOND EDITION

UNDERSTANDING
AND EQUIPPING
THE 21ST CENTURY
VOLUNTEER

JONATHAN MCKEE
THOMAS W. MCKEE

Who is volunteering?

“The number of individual volunteers is booming”

We used to recruit volunteers through religious and civic associations.

Today those that volunteer are people has tripled in the category of never attending a church or civic organization. In fact, church and civic association volunteers as a group are shrinking in number.

Two Willing Groups

Retiring “Boomers”
“Incoming Young Professionals”

Retiring Boomers

- They want to make a difference.
- They are not afraid of commitments (when there is a payoff – to themselves or the organization).
- They want flexibility.

BABY BOOMERS

Trailblazers of the New Retirement

Baby Boomers have re-written societal rules at every stage of their life. Now, they are trailblazing a new brand of retirement—one that often includes working. Many were mid-career when the retirement landscape shifted from traditional pension plans to 401(k) or similar plans, so they have had less time to save in 401(k)s. The Great Recession dealt a financial blow to many and, unlike younger generations, they have less time to financially recover before they retire. Baby Boomers are planning to work longer, yet few have a backup plan if forced into retirement unexpectedly.

2 out of **5** are proactively keeping **SKILLS UP to DATE** so they can continue working **PAST AGE 65** or in retirement if needed.

Two-Thirds plan to **WORK PAST AGE 65** or do **NOT** plan to retire.

34% expect **SOCIAL SECURITY** to be their **PRIMARY** source of **INCOME** when they retire.

25% have a **BACKUP PLAN** for retirement income if **UNABLE** to work prior to their **PLANNED RETIREMENT.**



TRANSAMERICA CENTER
FOR RETIREMENT STUDIES®

Source: Perspectives on Retirement: Baby Boomers, Generation X, and Millennials, 17th Annual Transamerica Retirement Survey of Workers' 2016. Transamerica Center for Retirement Studies® is a division of Transamerica Institute®, a nonprofit, private foundation that is funded by contributions from Transamerica Life Insurance Company and its affiliates and may receive funds from unaffiliated third parties. For more information, please visit www.transamericacenter.org.

\$147,000
TOTAL household **RETIREMENT SAVINGS** (median).

How do we “recruit” the Boomers?

Do you have a cause?

Are you providing opportunities for them to use their professional skills?

Are you keeping the standard high?

Are you highlighting the payoffs?

Are you providing flexibility?

How do we “recruit” the Boomers?

Do you have a cause?

- They want to make a difference, not a contribution.

Are you providing opportunities for them to use their professional skills?

- Do they get the chance to use the technology they learned in the job? Are they able to be a leader or a follower

Are you keeping the standard high?

- They don't want to work with half-committed, unprofessional “any old way will do” volunteers.

? Are you highlighting the payoffs?

- Make sure they know what's in it for them, as well as how their work benefits your cause or mission

Are you providing flexibility?

- They are on the go and will often volunteer for more than one organization.

Incoming Young Professionals

- **They are impatient.**
- **They are multitaskers.**
- **They think “digitally”.**
- **They are tolerant.**
- **They are looking for causes to support.**
- **They are great team players who want to build a community.**
- **They want to be led, not managed.**

Incoming Young Professionals”

- **They are impatient.**
 - Grew up playing video games, where winning means going to the next level. They are impatient to move up the organizational chart. When they complete a task, they want to know “What’s the next challenge?”, or “When do I get to be in charge?”.
- **They are multitaskers.**
 - Volunteer managers need to be tolerant when this generation does things differently that “the way we have always done it”.
- **They think “digitally”.**
 - They grew with MTV (100 images a minute), quick-cut action films and streaming video (not VCR’s). They don’t think or act linearly. To manage them provide them with opportunities to make an impact.
- **They are tolerant.**
 - They do not have an inherent respect for titles and/or positions. What registers with them is personal authenticity and passion about live regardless of background, education or societal “ranking”. They are great team members, ignoring gender and racial biases, willing to work with anyone to achieve common goals.

Young Professionals

- **They are looking for causes to support.**
 - They want to make a difference and leave their mark. They may engage with you as a school project or because they are required to perform community service hours. If you inspire them, making your passion their passion, they may continue to work for your organization.
- **They are great team players who want to build a community.**
 - They want their workplace to be social and fun, to be able to contribute their unique talents to a winning team.
- **They want to be led, not managed.**
 - Help them understand your mission, your cause and your desired outcomes. Do not micromanage.

How do we recruit Young Professionals

Be

Be mission driven.

- Don't give "do this by that time" assignments. Instead, ask "what can you do to help us accomplish our mission?". Get to know them and listen to their ideas.

Be

Be a coach (not a manager).

- Nurture them, but also challenge them to be their best, to reach their full potential.

Involve

Involve them in decision making.

- They want to be a part of the team making decisions.

Create

Create a diverse leadership team.

- They ignore gender and racial biases and will work with anyone who can help them accomplish goals.

Take

Take advantage of community service requirements that many schools require.

- Create opportunities for them to become engaged, then inspired by your organization.

Managing Under-performing Volunteers

- Do you keep 'em or can 'em?
- Walk in their shoes for a moment
- Are there truly valid complaints behind their actions?
 - Facts versus feelings versus the future
- Determine how you will respond
 - Frame the problem
 - Set the standards – reference the job description
 - Offer time away
 - Set time for the next check-in

How do you “fire” a volunteer?

- Carefully!!!
- Respect them and listen
- Explain expectations and why they are not being met
- Ask whether there is something standing in their way
 - Offer support and additional help
- Negotiate the time left
- Make sure they don't leave with all the knowledge



Next meeting

- September 24, 2022
- Susan Ball is our speaker
- “Winning Journal Strategy”



Thank You!

