

# **Society of Genealogists**

## **Strategic Plan 2009 - 2011**

**May 2009**

# Introduction

The Strategic Plan has now gone through a number of stages and reviews and as a result of these, this is the final plan. It takes into account a number of recent actions regarding communications and fundraising.

## Aims for Now and the Future.

In all the discussions that have taken place it has always been agreed that there will be a continual demand for services and support for people interested in family history and genealogy, and that the products and services provided by the Society will continue to be relevant and appropriate.

Of paramount importance to all we wish to achieve is to retain and increase our membership, and to secure funding, so that the Society is not totally dependent on current sources of income both to secure its future, and also to expand the services it provides to its members and others.

Consequently the Society should:

- Be seen as the resource and authority on genealogy and family history
- Be an enabling organisation
- Be there for everyone wishing to access information, from the newcomer to genealogy, to the professional. It has to be able to cater for a wide range of users with different needs and expertise.
- Improve its public visibility
- Build upon existing core strengths to develop its work.
- Conserve a unique and growing number of original collections and build upon the unique resources it offers.
- Have up to date products that reflect current technology and customer needs
- Ensure that data is accessible and provide education to improve access to data
- Build upon the opportunities including:
  - Extending the study family history to include social research
  - International collaboration
  - The Centenary in 2011
  - The Olympics in 2012
- Be flexible and respond to changing needs
- Be clear about the resources needed
- Be dynamic and willing to take properly evaluated risks to fulfil our vision

# Developing the Strategy.

## Identifying the Priorities.

Strategic positioning of ongoing areas of activity with reference to their importance

Review Working Parties, their activities, workloads and Terms of Reference in the context of strategic importance and sound out new blood

## Practical Constraints and Concerns.

We have to be realistic about the limits of our capabilities, especially for generating new income streams:

- what skills do we have, matched to future needs?
- how much?
- spread of the resources?
- better use of volunteer efforts?

We have many good services and products, some of which are unique, but we are unable to make them accessible to some members or to most non-members.

## Idea of “ Market “ Segmentation

Look at our unique products and collections of special interest to particular groups, *e.g* Jewish community and segment our collections accordingly, with regards to digitisation and fundraising.

## Strategic Priorities.

- Do fewer activities
- Identify what the priorities are
- Do the priority activities
  - better
  - more effectively
  - in a way that will achieve results more quickly

## Allocation of effort.

We must allocate our efforts and skills so that priority is given to potential sources of income that are worthwhile

## Classification of income streams

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| <p><b>Membership</b></p> <p><b>Library services and digitisation</b></p> <p><b>Fundraising</b></p> <p><b>Grants from Trusts for priorities</b></p> <p><b>Appeals for donations</b></p> <p><b>Legacies</b></p> <p><b>Education</b></p> <p><b>Lectures and events</b></p> <p><b>Research</b></p> <p><b>Website marketing and publicity</b></p> <p><b>Trading agreements</b></p> <p><b>Publications</b></p> |
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# The Strategy

**Our strategy has three main strands, the first two supported by the third:**

- **Products and Services**
- **Income Generation**
- **Communications and Marketing**

To support these aims a number of interlinked strategies are required to take us forward.

## **1. Products and services in tandem with Enterprises.**

- Ensure that the Society has up-to-date products and services that are accessible and reflect current technology and customer needs
- Ensure that the Society's many unique collections are widely available through digitisation
- Improve accessibility of:
  - General information
  - Key data
  - Education programmes and events
- Encourage the Library and Education Committees to become involved in the development of ideas for income generation
- Plan for what happens when we run out of space.

## **2. An income generation and resource strategy.**

- Apart from membership fees, income to support the Society is generated by the education and events programme including our own Family History Show, by SoGE sales from the bookshop and other outreach events, by research activities and by donations and legacies.
- The priority is the recruitment and retention of members, as it will be difficult to raise membership fees in the short term much above the rate of inflation. The introduction of a members only section on the website and placing digitised records there will play an important role in both activities.
  - Volunteers. They play a very important role in everything that the Society intends to do. A full strategy has to be in place to enable the Society to recruit initially a volunteer co-ordinator followed by a plan to recruit and train more volunteers to work both in the library and at home on a number of very important projects. A priority has to be to find project co-ordinators for a number of large digitisation projects.
  - Fundraising. A fundraising assistant is now in post and apart from grant applications other sources of income will be developed.
  - Ensure that all aspects of education are investigated with respect to increasing income either on our own or with other partners
  - Extend where practicable the research activities of the Society
  - Extend and develop all aspects of the Society's outreach programme

- Strengthen in conjunction with SoGE the publication and sales of Society books
- Identify where possible, other sources of income.
- The **KEY priority** apart from **Membership, Volunteers** and the **Website** is **DIGITISATION**

### **3. Communications and marketing.**

For any of the above to have real impact and to be successful it is essential that the Society has in place an effective communications and marketing strategy.

- Key to the success in this is how the Society utilises all aspects of the internet and in particular its website.
- Any internet activity has to ensure that we reach members, volunteers and the Public. Members are of particular concern; as they do not all have access to the Internet, so we cannot rely solely on this as a means of communication. It is important for the Society and its contact with members that we obtain full e-mail details from both existing and new ones.
- Strengthen the marketing working party to include more staff members and others with special skills as and when required.
- Ensure support and promotion of committed activities, choosing the most appropriate tools
- Carry out market research in areas of weakness where our understanding and knowledge of our market place is limited

## **Implementing the Strategy.**

In any strategic document full details are omitted, as they should be presented in the Business Plan, as this is the working document that governs all Society activities in relationship to the Strategic Plan.

The Business Plan will be regularly reviewed to ensure that the Society is acting upon the agreed Plan and that any changes that need to be made to keep the Society on target in relation to the Plan are made with approval of the Trustees.

**May 2009**