



## Society of Australian Genealogists Vision Statement and Strategic Plan 2020-2023

### Our Mission

To inspire all to learn more about their past.

### Our Vision

To be recognised as the leading organisation of learning and engagement in family history in Australia.

### Our Values

Inclusiveness, Integrity, Passion, Determination

### Our Place

The Society operates two premises:

Richmond Villa - 120 Kent Street, Millers Point NSW Australia

Research Library – 2/379 Kent Street, Sydney NSW Australia

and an

Online community for learning and engagement

Richmond Villa houses our archives, library stack and seminar room.

The Research Library houses our library and technology offerings, shop and hands on computing courses.

Focus Areas	Strategic Objectives	Projects	KPI's
<b>Learn/Educate</b>	<ul style="list-style-type: none"> <li>• More Online Offerings – requires more hosting and full time Education Officer</li> <li>• Varied program – not the “usual” topics on repeat</li> <li>• Encourage more members to participate in our education offerings</li> </ul>	<ul style="list-style-type: none"> <li>• Full time Education Officer</li> <li>• Keep a lot of our education program online to engage with regional, interstate and overseas members</li> <li>• Think outside the box for webinar/talk topics – has proven successful with Irish Day.</li> <li>• Education Survey – to help guide programming</li> <li>• STITCH website – to engage with target audience – member to run and promote SAG</li> <li>• DNA Consultations to meet an ever growing need</li> <li>• Review of Certificate and Diploma courses to ensure they remain relevant and up to date</li> </ul>	<ul style="list-style-type: none"> <li>• Employment of full time Education Officer</li> <li>• Education program is predominantly online and offering a varied program</li> <li>• Increased attendance at education offerings</li> <li>• Evaluate how STITCH has performed – if positive, consider another year</li> <li>• DNA consultations have commenced – evaluate results</li> </ul>

Focus Areas	Strategic Objectives	Projects	KPI's
<b>Community</b>	<ul style="list-style-type: none"> <li>• New Member engagement</li> <li>• More general website content to entice new members</li> <li>• How to engage Members when face-to-face activities can occur again</li> </ul>	<ul style="list-style-type: none"> <li>• Formation of Membership Committee</li> <li>• Social networking events (likely face-to-face)</li> <li>• General website content – what is needed and how do we achieve it</li> <li>• Continue Hang Outs and add monthly Q&amp;A and bi-monthly new member meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Membership Committee has been formed</li> <li>• New Member meetings occur bi-monthly or as required</li> <li>• New face-to-face activities (if allowed)</li> <li>• Member engagement events continued and new events (new members and Q&amp;A) are running as required</li> </ul>
<b>Realign</b>	<ul style="list-style-type: none"> <li>• Changes to how we work and operate</li> <li>• Changes to staff roles within the organisation</li> <li>• Change how we recruit Board Directors</li> </ul>	<ul style="list-style-type: none"> <li>• Staff roles tweaked/changed as required to align with new operational methods (online and member engagement)</li> <li>• Succession plans</li> <li>• Staff wages – do they meet best practice standards?</li> <li>• Advertise for Board Directors with skills that match requirements within the Society and consider members from outside NSW now that online meetings are possible.</li> </ul>	<ul style="list-style-type: none"> <li>• Staff roles have been realigned with new operational model</li> <li>• Staff wages have been reviewed</li> <li>• Succession plans are in place</li> <li>• New recruitment method for Board Directors has been implemented and vacancies filled</li> </ul>
<b>Growth</b>	<ul style="list-style-type: none"> <li>• Grow our Membership</li> <li>• Increase our education attendance</li> <li>• Digitisation of Society holdings and availability to members online.</li> <li>• Communication and Media/Social Media increase</li> <li>• Partnerships</li> </ul>	<ul style="list-style-type: none"> <li>• What we do best and why you should be a member focus</li> <li>• Archives Officer to catalogue archives and prepare data for digitisation</li> <li>• Improve our communication in the wider community – we want to be ‘the place’ for family history in Australia/Australasia</li> <li>• More ‘Member Only’ benefits/offers</li> <li>• Partnerships with other organisations to increase our reach in the community</li> </ul>	<ul style="list-style-type: none"> <li>• Archives Officer employed for one year full time initially then re-evaluate.</li> <li>• Improved communications to our members and the wider community to encourage new members as well as retain current members</li> <li>• Building our SAG brand</li> <li>• Partnerships with other organisations created and ongoing</li> <li>• Additional ‘Member Only’ benefits and services offered</li> </ul>
<b>Financial Sustainability</b>	<ul style="list-style-type: none"> <li>• consider new membership options</li> <li>• broaden sources of revenue</li> <li>• prudent management of investment</li> </ul>	<ul style="list-style-type: none"> <li>• optimize subscription fee income and retention</li> <li>• evaluate wider sources of revenue including</li> </ul>	<ul style="list-style-type: none"> <li>• revised membership fee offering including multi-year</li> <li>• scoping study to assess interest in</li> </ul>

Focus Areas	Strategic Objectives	Projects	KPI's
	funds <ul style="list-style-type: none"> <li>• utilisation of bequest funds</li> <li>• evaluation of future premises requirements</li> <li>• management of expenses</li> </ul>	advertising, partnerships, sale of resources <ul style="list-style-type: none"> <li>• review investment management mandate to produce optimal investment outcomes</li> <li>• consider specific projects/programmes using funds received from bequests</li> <li>• consider option to maximise accessibility for members to SAG resources and reduce duplication of costs</li> <li>• detailed analysis of all expenditure to reduce current operating deficits from “normal” operations</li> </ul>	advertising, partnerships and resources <ul style="list-style-type: none"> <li>• review of Macquarie performance and evaluation of alternative options</li> <li>• prioritise tasks/issues requiring funding</li> <li>• review current premises arrangements and identify and consider alternatives</li> <li>• identify expense savings and optimise “normal” expenditure</li> </ul>

➤ As a business many of our Strategic Objectives and Projects overlap each of our Focus Areas – if one occurs and is successful then others are.