

MASSACHUSETTS SOCIETY OF MAYFLOWER DESCENDANTS



STRATEGIC PLAN 2009

PRESENTED TO THE BOARD ON

9 JUNE 2009



## TABLE OF CONTENTS

Introduction .....	2
History and Organization .....	2
Mission .....	3
Vision .....	3
Statement of Need .....	3
Services Provided .....	4
Core Competencies .....	5
Target Audience .....	5
Environmental Assessment .....	6
Strategic Goals and Objectives .....	7
Goal One: Raise level of awareness of the experience of the Mayflower passengers .....	7
Goal Two: Achieve maximum use of information technology .....	8
Goal Three: Attain financial sustainability to support goals .....	9
Goal Four: Develop Board and Staff .....	10
Goal Five: Encourage collaborative relationships .....	11
Conclusion .....	11
Appendices .....	12
Appendix A: Ad Hoc Strategic Planning Committee .....	12
Appendix B: Meeting Schedule .....	13
Appendix C: Interview Format .....	14
Appendix D: Interview Summary .....	15
Appendix E: Fees of General Society and State Societies .....	19
Appendix F: Technology Overview .....	21

## INTRODUCTION

The purpose of this strategic plan is to enable the Massachusetts Society of Mayflower Descendants (“Massachusetts Society”) to instill vitality, maintain viability, and fulfill more effectively its mission and vision by raising the level of awareness of the *Mayflower* experience as a defining event in the history of the United States.

## HISTORY AND ORGANIZATION

The celebration of the centennial of the United States in 1876 inspired a renewed interest in American history that eventually led to the formation of dozens of hereditary and patriotic organizations. The first society for descendants of Mayflower passengers was established in the state of New York in 1894 followed by societies in Connecticut, Massachusetts, and Pennsylvania in 1896. These four state societies joined to form the General Society of Mayflower Descendants in 1897, which subsequently has chartered state societies in all fifty U.S. states, the District of Columbia, and Canada.

The Massachusetts Society, as are the General Society and other state societies, is a membership organization with a governing body called the Board of Assistants consisting of the officers: Governor, Deputy Governor, Secretary, Treasurer, Historian, Captain, Elder, Surgeon, and Counselor; and nine Assistants elected by the membership of the Society. The officers are elected annually for one-year terms and the Assistants for three-year terms. Former governors are *ex officio* Assistants while they remain members of the Society. Currently there are 3,400 lifetime and regular members. The Board of Assistants regularly meets quarterly with an annual meeting of the membership in the spring.

The original purposes of the Massachusetts Society were patriotic, antiquarian, and historical. Today, in addition to social gatherings that include the Annual Meeting (April), Peregrination Day (Summer), and Compact Day (November), and access to its research library, membership benefits include the Massachusetts Society’s newsletter (*The Compact*), membership in the General Society and its magazine (*The Mayflower Quarterly*), and eligibility for scholarships to a New England college or university. The Massachusetts Society offers occasional publications, educational programs in Massachusetts elementary schools, and supports the publication of the *Mayflower Descendant*. Annually it also awards two scholarships to members of the Wampanoag Nation attending any institute of higher education located in New England. Currently the Massachusetts Society has offices in Braintree, Mass., where it maintains a staff of three, Historian, Executive Secretary, and Librarian/Archivist, and a library that contains thousands of volumes of vital records, family genealogies, town histories, and other material useful for Mayflower family research that is available to the public.

## **MISSION**

The Massachusetts Society's mission is:

*To perpetuate the memory, spirit and values of our Mayflower ancestors.*

## **VISION**

The Massachusetts Society's vision is:

*To facilitate genealogical research and documentation for Mayflower descendants.*

*To develop greater cooperation and collaboration associated with the preservation and celebration of the Mayflower and Pilgrim history.*

*To promote inclusiveness and a sense of community of other groups associated with the Mayflower and Pilgrim experience.*

*To expand membership to ensure the future viability of the Society.*

*To inform and educate the public of the role our Mayflower ancestors played in the foundation of America.*

## **STATEMENT OF NEED**

Approximately 35 million individuals living today are believed to be descendants of Mayflower passengers. The Massachusetts Society is one of 50 state societies, one in the District of Columbia, and one in Canada that offers to those individuals, who have knowledge of their lineage, validation as a descendant of one or more *Mayflower* passengers, and association with other documented descendants along with other benefits of membership. By virtue of membership in one of these societies, an individual is a member of the General Society of Mayflower Descendants. Membership in the Massachusetts Society is open to all regardless of residency.

## SERVICES PROVIDED

### Membership

The time frame for the application process from initiation of an application to notice of acceptance of membership can range from two to nine months depending upon the availability of known details of the applicant's lineage and required documentation to support the application. After review by the Massachusetts Society, the completed application and documentation, is submitted to the General Society for final review and approval. The current fees are:

Application	\$200
Annual dues	\$60
Life membership:	
under 60	\$1000
age 60 to 69	\$800
age 70 to 79	\$600
over 79	\$400

### Benefits

The Massachusetts Society offers educational programs, publications and research assistance. There are three educational programs a year; two are luncheon meetings with an educational speaker on a variety of topics. A third meeting in the summer, known as Peregrination Day, is a social gathering held at a local historical site that is organized to attract the entire family. This summer meeting is open only to member families and their friends.

Educational materials are provided to school-aged members in grades K through 7 with a focus on grades 3 and 5. There are also occasional mailings to teachers of Pilgrim history.

The Massachusetts Society annually offers two Sears Scholarships (\$1000) to members or near relatives of members attending a New England college and two Thanksgiving Day Awards (\$1500) to members of the Wampanoag Nation attending any institute of higher education.

In addition to educational benefits offered directly by the Massachusetts Society, the General Society operates a museum, The Mayflower Society House – an 18<sup>th</sup> Century mansion with many period features located in Plymouth that was built by a *Mayflower* descendant. This is open to members and the general public. Tours for a donation are given during the summer months. A museum store offers a selection of educational material for children which may be purchased at the museum store or may be purchased online.

The Massachusetts Society publishes a triannual newsletter (*The Compact*) that also is available on the Society's website. It provides news of the Society, reports on meetings, and articles of historical interest. The Massachusetts Society also publishes biannually the *Mayflower Descendant*, a scholarly journal available to anyone by subscription, and a pamphlet series on *Mayflower* passengers and descendants of passengers. In addition, it has recently published two reference books: *Middleborough, Massachusetts Vital Records* (1986, 1990) and *Vital Records of Stoughton to the Year 1850* (2008).

Also available to members is the *Mayflower Quarterly* magazine published by the General Society, which contains news of the General Society and state societies and state colonies along with articles of historical and genealogical interest. It is available at no charge to members and by subscription to non-members. The General Society also has published the *Mayflower*

*Families Through Five Generations* series that documents each *Mayflower* passenger that left descendants (except Moses Fletcher) and is regarded as the authority relative to these generations for the application purposes. These are available for sale at the General Society's Plymouth, Mass., offices or may be purchased online.

The Massachusetts Society's research library located in Braintree is open daily (M-F) to the general public at no charge. The library's collection includes reference books for genealogical research, manuscripts, Pilgrim History Collection, files for support of all membership applications (digitized and soon to be available for use in house), and the business archives of the Massachusetts Society. The library provides access to several paid online databases, many CD databases, and access to the internet. The holdings are listed on our website. Professional research support in response to brief reference questions is available via email or by telephone.

The Massachusetts Society's website contains information on the Massachusetts Society with links to various family societies, genealogical associations, publications, and other resources. The website also provides information how to apply for membership, an explanation of the application procedure, application forms, and information on inventoried library resources. In progress are the soon to be created research aids for the New England states, New York, and Nova Scotia, and eventually digitalized records of members' application research and a master genealogical database for *Mayflower* descendants with supporting citations.

The General Society also maintains a research library and the Mayflower House in Plymouth that are open five days a week, which is available to members at no charge and to non-members for a usage fee. The library collection includes reference books for genealogical research, manuscripts, microfilms of Plymouth County records, and the files for support of all membership applications from every state. The library also provides support via telephone and email for members and state society historians.

## **CORE COMPETENCIES**

The Massachusetts Society provides:

- \* Expertise of professional staff genealogist.
- \* Assistance in creating fully documented lineage applications.
- \* Use of information technology (website) for lineage research.
- \* High standards of scholarship.
- \* Publication – one of the leading scholarly journals in the country.
- \* Resources (expertise, consulting, etc.) to other societies.

## **TARGET AUDIENCE**

The target audience of the Massachusetts Society is an estimated 35 million individuals who are descendants of *Mayflower* passengers, interested in researching their ancestry, and professional genealogist, historians, and other individuals interested in the history of the *Mayflower* passengers.

## ENVIRONMENTAL ASSESSMENT

### Other Lineage Societies

Potential competitors are the General Society and other state societies as well as lineage societies of descendants of individual *Mayflower* passengers (e.g., Alden and Howland societies which compete with online validation of research, but are less well known to those other than historians and genealogists). The Massachusetts Society has one of the highest fee structures, but provides greater research and validation assistance that facilitate approval. [See Appendix, p. 19-22.]

### Information Technology

Information technology offers both challenges and opportunities. Principal online competitors are New England Historical Genealogical Society ([newenglandancestors.org](http://newenglandancestors.org)), the Family History Library ([familysearch.org](http://familysearch.org), especially with their “pilot” project), and Ancestry.com. However, these organizations do not validate an individual’s research. An upgrade of the Massachusetts Society’s website would enable it to receive payment online of fees, dues, and donations. It would create also the opportunity to offer genealogical research services for a fee. The Massachusetts Society is in the developing stages of a project with the Family History Library in which an individual searching their website ([familysearch.org](http://familysearch.org)) could access the Mayflower database and direct potential new members to the Massachusetts Society. The same opportunity exists with the New England Historical Genealogical Society’s web site. [See “Technology Overview at MSMD” by Scott Andrew Bartley describing current and future technology practices, Appendix, p. 23-24.]

### Office Location

The location of the Massachusetts Society’s office in Braintree generally is not convenient for members or the general public. More convenient locations are Plymouth (where other distinctly *Mayflower* venues are located) and Boston (the center for all New England genealogical research and the former location of its office). An advantage of Plymouth is that typically tourists visit Plymouth and nearby Plimoth Plantation because of their historical interest, but also may be interested in researching their lineage and possible connection with the *Mayflower*. In collaboration with Pilgrim Hall and/or Plimoth Plantation, a potential opportunity is to locate kiosks equipped with access to the Mayflower database for the convenience of tourists or other visitors with interest in their lineage. Currently, New England Historical Genealogical Society maintains a kiosk at Plimoth Plantation with limited information regarding the first generation of immigrants. Boston is a more convenient location for those interested primarily in genealogical research due to nearby university libraries, Boston Public Library, state repositories for genealogical records, and New England Historical Genealogical Society. Access to these facilities for staff whose responsibility it is to expand the Mayflower database is key. Other considerations in determining the office location are the convenience for staff, access to the business records, and the library.

## STRATEGIC GOALS AND OBJECTIVES

Five strategic goals were established with accompanying objectives:

***Strategic Goal One:***  
***Raise level of awareness of the experience of the Mayflower passengers***

### Objectives

I. Attract individuals who are descendants of *Mayflower* passengers to apply for membership and retain current members to support the goals and activities of the Massachusetts Society.

The objective is to increase membership.

II. Generate interest in the history of early America as the foundation for 21<sup>st</sup> century America values, more particularly, what may be learned from the experience of the *Mayflower* passengers; including the reasons for their voyage and the challenges they faced in forging a new life in America.

The objective is to promote the values of the Mayflower passengers and the historic significance of their experience in the founding of the United States and its evolution in which all Americans can share.

### Action Steps

Organize an *ad hoc* task force consisting of board members, general membership, and staff to **develop a marketing / public relations / communications plan** encompassing the website, publications, membership communications, and press releases that:

- i. will communicate the core message and essential value propositions of the Mayflower experience; and
- ii. generate interest in applying for, and maintaining, membership and/or supporting the Massachusetts Society and its activities. The task force with the approval of the board may engage outside professional advice to support its activities.

**Strategic Goal Two:**  
***Achieve maximum use of information technology***

**Objectives**

I. Develop state of the art web site that will:

- i. serve to inform individuals about the Massachusetts Society and its goals, membership requirements, benefits and activities; and
- ii. provide links to web sites of other lineage societies, including the General Society, state, District of Columbia and Canadian Mayflower societies, family societies, genealogical organizations, [blogs, online community sites, e.g., Facebook, Twitter, etc.].

The objective is to enhance the Massachusetts Society's ability to communicate with members and the general public about the Society and its activities.

II. Facilitate genealogical research.

The objective is to utilize the Massachusetts Society's unique core competency and expertise as a resource and to provide assistance in genealogical research for membership in the Society or its affiliate societies.

**Action Steps**

Organize an *ad hoc* task force consisting of board members, general membership, and staff to **develop a technology plan or footprint** that:

- i. will enhance the Massachusetts Society's web presence, including links to community web sites, and web sites of other lineage and genealogical organizations in support of Strategic Goal One; and
- ii. provide access to the Society's data sources and other data sources that will support genealogical research in support of Strategic Goal Two. The task force will identify appropriate vendors, costs and make recommendations for implementation phases. The task force with the approval of the board may engage outside professional advice to support its activities.

**Strategic Goal Three:**  
**Attain financial sustainability to support goals**

### Objectives

I. Develop long range financial plan to project the Massachusetts Society's need for resources to fund annual operating and capital expenses, and to maintain an adequate operating reserve and endowment to meet evolving and growing programmatic needs.

The objective is to establish a multi-year (3-5 years) financial plan showing projected sources of income (e.g., membership application fees and dues, grants and donations, fees from services and publications, etc.) and projected operating and capital expenses.

II. Establish development program.

The objective is to generate additional income from annual fundraising, grants, special fundraising events, capital fund raising, bequests, etc.

III. Increase publications.

The objective is to generate additional income from publications.

IV. Provide research and other professional support to other Mayflower societies on a fee-for-service basis.

The objective is to generate additional income from contracting with other societies to leverage the Massachusetts Society's core competency and expertise to provide research and other professional assistance in connection with membership applications. [See Strategic Goal Two.]

### Action Steps

1. Establish as standing committees of the board:
  - i. a **finance committee** to provide direct oversight of the Society's finances, including development of an annual budget and a multi-year financial plan; and
  - ii. a **development committee** to develop annual fund raising and capital fund raising plans to support Strategic Goals One and Two.
2. Organize an **ad hoc program task force** consisting of board members, general membership, and staff to make recommendations for continuation or modification of existing programs and addition of new programs to support Strategic Goals One and Two.

**Strategic Goal Four:  
Develop Board and Staff**

**Objectives**

I. Organize and develop the board to provide the guidance, strategic planning, and oversight necessary to establish and achieve the Massachusetts Society's programmatic and financial goals.

The objective is to attract board members with needed skills and expertise, to establish a committee structure of standing and ad hoc committees to support programmatic and financial goals (See Strategic Goal Three, e.g., finance committee and development committee), and provide clarity relative to the role of the board, board members and committees.

II. Organize and develop the administrative staff to provide the expertise and leadership necessary to implement the Massachusetts Society's programmatic and financial goals.

The objective is to have an administrative structure that has authority and expertise to provide the day-to-day management of the Massachusetts Society's operations and to implement the strategic goals and objectives.

**Action Steps**

1. Organize an ***ad hoc* governance committee** consisting of board members, general membership and staff to:
  - i. review the current board organization and make recommendations for appropriate changes, including designation of standing and ad hoc committees; and
  - ii. develop role descriptions for the board, board members, officers, and committees.
2. Organize an ***ad hoc* staff structure task force** consisting of board members, general membership, and staff to review the current staff structure and make recommendations for a staff structure and roles that will support the board activities and strategic goals.

***Strategic Goal Five:  
Encourage collaborative relationships.***

**Objective**

I. Initiate and/or strengthen collaborative arrangements with the General Society and affiliate societies, other lineage and genealogical organizations, and historical organizations.

The objective is to maximize the resources of affiliate societies and other organizations with common purposes by undertaking collaborative efforts that will support their common purposes. Such arrangements might include development of information technology to meet their unique needs, joint purchasing, joint publications and sponsorship of educational events that promote the *Mayflower* experience.

**Action Steps**

Organize an ad hoc task force consisting of board members, general membership, and staff to identify potential partners and opportunities and **develop a plan for collaborative efforts.**

## CONCLUSION

The full and ongoing participation and active leadership of the Board of Assistants of the Massachusetts Society is crucial to the successful implementation of the foregoing Strategic Plan as well as tactical implementation of all recommended actions from appointed task forces and committees. The board is responsible for oversight of both ad hoc and permanent committees and will be expected to personally participate in one or more committees. Finally, board members will be asked to make critical decisions on resource allocation and spending for the Society and to play a central role in the future fundraising efforts of the Massachusetts Society.

## **APPENDIX A**

### **Ad Hoc Strategic Planning Committee Members for 2009**

Michael Hunt Studley, Esq. (Governor)  
Wigmore A. Pierson (Immediate Past Gov.)  
Richard Standish Gilmore, Esq. (Dep. Gov.)  
Judith Chace Needham (Treasurer)  
Dr. Bruce R. Bistran, PhD. (Surgeon)  
Cynthia Bailey Brown (Assistant)  
Scott Andrew Bartley (Support Staff)

ESC Consultants:  
Susan I. Moloney  
John V. Woodard, Esq.

## **APPENDIX B**

### **Strategic Planning Meeting Schedule**

**January 15, 2009 - May 21, 2009**

<b>Jan.15</b>	<b>Organizational Meeting</b>
<b>Feb. 5</b>	<b>Review history, mission, vision, services and need</b>
<b>Feb. 26</b>	<b>Identify core competencies</b>
<b>Mar.12</b>	<b>Environmental Assessment</b>
<b>Mar.26</b>	<b>Strategic Focus/Objectives and Tactics (begin)</b>
<b>Apr. 9</b>	<b>Objectives and Tactics/Financials</b>
<b>Apr.30</b>	<b>Board Development Session</b>
<b>May 7</b>	<b>Fundraising Session - Presentation by ESC Consultant Dean Ridlon</b>
<b>May 21</b>	<b>Final meeting to review project report</b>

**The meetings were held at the Society's office at 150 Wood Road, Braintree for approximately two hours in duration starting at 10:00 am.**

## APPENDIX C

### Strategic Planning - Interview Format

1. Interviewee Background
  - What is your occupation & background?
  - How long have you served on the MSMD Board?
  - How were you recruited?
  - What has been your role?
  - Are you involved with other non-profits as a board member, officer or employee?
2. Board Education and Communication
  - What information were you given when you joined the board? (e.g. manual, roles, & responsibilities. etc)
  - What are your special talents and areas of interest? Are they being used in your board service for MSMD? Where might they be used?
  - Are you kept aware of the Society's activities?
  - Is there anything that would help you be better able to serve as a member?
3. Overview of Current Situation
  - What challenges, if any, do you see the Society facing today?
  - How do you define the Society's Mission?
  - What needs is the Society addressing? Are there specific needs not being served?
  - Are there any changes that need to be made in the program/services offered, or in the way they are delivered?
  - How widely are your views shared by others on the board or staff?
4. Society Performance
  - How would you describe the Society's overall performance?
  - What thoughts do you have about improving MSMD's overall performance, including financial performance?
  - Do you think the board and staff have the right combination of skills, background, and interests to be most effective? If not, what should be added?
  - How would you describe the communication among board members and between board and the staff?
5. Other
  - Are there any other subjects you feel are important that we did not touch upon?
  - Who do you suggest we should contact to obtain additional facts and opinions that may be helpful in this strategic planning work?

## **APPENDIX D**

### **Confidential**

Massachusetts Society of Mayflower Descendants  
Strategic Planning Project - Interview Summary  
April 9, 2009

*[Confidential MSMD Board document deleted]*

*[Confidential MSMD Board document deleted]*

*[Confidential MSMD Board document deleted]*

## **APPENDIX E**

### **State Society Fees Survey**

### SURVEY OF STATE SOCIETIES

State	App. fee	Supp. fee	Dues	Life fees	Age for Full mem.	Jr. mem.	First dues req. upfront	Percentage Life / Ann. / Jr.	Remarks
Ala.	100	100	25	n/a	18	Yes	--		Life suspended
Ak.		no report							
Ariz.	85	85	28	n/a	18	Yes	Yes		Has website
Ark.	100	75	25	n/a	18	Yes	Yes		Life suspended
Calif.	120			600					<i>From website</i>
Can.	95	95	45	n/a					<i>From website</i>
Colo.	125	100	30	450	18	Yes	Yes		½ dues 1 July
Conn.		no report							Has website
Del.		no report				Yes			<b>Not on website</b>
D.C.		no report				Yes			<b>Not on website</b>
Fla.	115	115	30	65+ 350 50-64 450 35-49 550 under 35 600	18	Yes	No		App. waived for Jr. 18-25
Ga.		no report							Has website
Hi.		no report							<b>Not on website</b>
Id.	95	85	20	150	0	No	Yes		Life req. <18
Ill.	100	--	50	65+ 500 35-65 900 18-34 1100 under 18 1500		Yes			<i>From website</i>

State	App. fee	Supp. fee	Dues	Life fees	Age for Full mem.	Jr. mem.	First dues req. upfront	Life / Ann. / Jr.	Percentage	Remarks
Ind.		no report								
Iowa		no report								
Kans.		no report			18	Yes				<b>Not on website</b>
Ky.		no report		called Jim Hancock						
La.		no report								
Me.	90	90	20	60+ 210 46-60 260 31-45 310 18-30 360 under 18 560	18	Yes	Yes			<i>Also on website</i>
Md.	--	--	35	700	18	Yes				<i>From website</i>
Mass.	200	150	60	80+ 400 70-79 600 60-69 800 under 60 1000	0	No	Yes	70 / 30 / 00		<i>Also on website</i>
Mich.	--	--	28	70+ 240- 60-69 300 41-59 400 under 40 400						<i>From website</i>
Minn.	150	150	35	75+ 500 55-74 600 35-54 750 18-34 1000	18	Yes	Yes			
Miss. Mo.										<b>Not on website</b> <b>Not on website</b>



State	App. fee	Supp. fee	Dues	Life fees	Age for Full mem.	Jr. mem.	First dues req. upfront	Percentage Life / Ann. / Jr.	Remarks
S.D.	100	50	30	56+ Dues x 10 35-55 Dues x 12 <35 Dues x 15	18	Yes	No		Also on website
Tenn.		no report							
Tex.	120	120	25	Dues x 25	18	Yes	Yes		Not on website
Utah	75	75	20	n/a	18	Yes	No		Not on website
Vt.	85	85	32	n/a	18	Yes	Yes	45 / 55 / 00	Not on website Life sus. 6y. ago
Va.		no report							
Wash.	100	100	25	65+ 315 to under 35 625	18	Yes	Yes		25y. mem. gets 40y. "mem." Not on website
W.V.	95	95	20	450	18	Yes	Yes		
Wisc.	75	75	25	400	21	Yes	No		Not on website
Wyo.	50*	50*	22	n/a	18	Yes	No		Life suspended

\* Note fee is under the \$75 charged by the General Society for applications and supplementals.

## APPENDIX F

### TECHNOLOGY OVERVIEW AT MSMD

*by Scott Andrew Bartley*

This is a summary overview of what technology we use today and of what there is out there (or soon to be out there) that we may want to utilize for our development.

#### CURRENT PRACTICE

There are three desktop computers with two directly connected printers that are wirelessly linked on an office network and connected to the internet via a 172K dsl line from Verizon. We have one older scanner attached to one computer.

#### *Membership records*

We use Microsoft Access to keep track of all membership and applicants. The database includes all deceased members and also those that have applied and were rejected or never completed the process. This data contains the fields for First Name, Maiden Name, Last Name, Suffix, Address 1 & 2, City, State, Zip, Country, Telephone, Email, Compact (delivered electronically), Occupation, Donor (space for amounts starting in 2001), Mass. #, General #, Membership status, Year (for annual dues), Ancestor, Supplementals, Membership date, Birth date, Death date, Notes, Preliminary date (when first paperwork was received), Check date, Paid, Due, Payment history, and Offices held.

#### *Historian's records*

Applications are created using a Microsoft Word 2003 forms document. These are the files that start as worksheets mailed to applicants and transition to the final application that is printed on permanent paper and signed by the applicant in duplicate. The two hard copies are sent with all the proof to the General Society. They annotate the application and return one hard copy for our records along with a digital version in pdf format. The hard copy is eventually bound in groups of hundred applications.

#### *Correspondence records*

Electronic copies of letters might be kept on the computer they were created, but that would be rare. All emails sent or received (except spam which is deleted) has been kept on the "email access" computer for several years.

The membership is informed of Society activities through a newsletter three times a year. This is emailed to about 200 members out of 3400, the officers, and the other state newsletter editors. It is then uploaded to the website.

#### *Website*

Our website is hosted by Conversant (One Communications). A working copy of this website is on the "email access" computer. This is the only computer with the software to modify the website and the original CD of the program was lost in the move to Braintree.

***Security and backup***

The users of the three computers are responsible for their own backup onto flashdrives the Society purchased. These are supposed to be stored away from the Society. Two of them are for sure. Each user is also responsible for any computer updates and the normal watch of viruses, etc.

**FUTURE PRACTICE**

Ideally, there needs to be a unified office process that eliminates issues with personal users. There should be an office server where all files and programs are stored, updated, and backed up. This can be on a secured wireless network in the office. This will allow for remote access of the data as well. To achieve a useful remote access as well as research time for the staff, the office should go to FIOS internet. At the Wood Road facility, there is actually no other options open to us. Having tech support of all computer systems would be helpful.

***Membership records***

We need to purchase a membership / fundraising program to help facilitate both efforts. Ideally it should be web accessible to allow us to have applications, renewals, donations, and other activities via membership action. The program needs to seamlessly generate email addresses for batch newsletter mailings, mail merge with our renewal and fund raising efforts, and whose output is transferred wirelessly to the photocopier.

***Historian's records***

Ideally applications should be partially generated from the website (and the fees accepted online). The worksheets should be sent electronically and with the right applicant, all records be delivered to the office as scans. The less paperwork the more efficient the office can be. The system with the General Society should be discussed to produce a final application where it is not all marked up with handwritten notes. This is unprofessional in appearance.

***Correspondence / website***

We need to develop a method for having constant updates to the website so the search engines are repeatedly reviewing it. This (along with good metadata) brings our website higher on the search results page. We are currently third for "mayflower" + "massachusetts" [the General Society is 25 on the third page] and we are first for "mayflower" + "descendant."

Another avenue to bring potential applicants to our website is the use of Facebook and Twitter. Both should be examined to see how they can bring attention to the Society.

***Security and backup***

We will likely need two servers that can be accessed via the internet. One highly secured server would have current membership information linked to a shopping cart system. We could receive payments online and orders for goods we sell. The second server would host the documents we have scanned of our entire membership files and their documentation along with the Mayflower Database we compile. Each would have their backup systems, virus protection and firewalls, and other security protocols.