



# Sustaining a JGS: BUILDING LONGEVITY

Susan Weinberg [Minnesota Jewish Genealogical Society](#) (2022)

The question I often ask myself when thinking of sustainability is “What will the organization need to know if I get hit by a bus?” The question could as easily be “What if I’m in Estonia when the website goes down?” In fact, when I was in Estonia, my JGS had a new website and was advertising an important upcoming event. When the website hit a glitch, I had to solve the problem from Estonia. That was the epiphany moment when I realized my JGS needed a more sustainable structure.

So, what makes a JGS sustainable? Perhaps we should ask that question in reverse – What are the factors that cause a JGS to fail? In recent years, the cause of several failures has been the loss of a long-time leader. But the loss isn’t just because that leader has departed his or her role; the underlying issue is that there was excessive reliance on one person for a lengthy time and no one willing to step up to take on the responsibilities of leadership with their departure. That situation raises the question of what we can do differently to foster sustainability much earlier.

Many organizations begin with a small leadership team and the depth of leadership is limited. As a result, one person may assume a broad range of responsibilities. Those individuals are often quite capable and perhaps less inclined to delegate as a result, but often limited in the number of people to whom they can delegate. These leaders often seem to be do-it-yourselfers by nature, a trait that while useful, must be moderated to expand and deepen board capabilities.

Sustainability and succession planning are inextricably linked. We certainly want to draw on those capable people who keep things running. We need them! But we also need a structure that actively engages others in the process of capably managing the organization and builds a bench of volunteers, future board members and future leaders.

There are some key areas through which to build sustainability that lay groundwork for succession planning. What are the characteristics of that leader that everyone relies upon? Leaders have a wide range of skills, confidence in their abilities and the “big picture” understanding that is relevant to operating the organization. Expanding skills and access to information for other members become important components in building a sustainable organization. With skills and knowledge comes the confidence to step into additional roles in the JGS.

The Minnesota Jewish Genealogical Society (MNJGS) is on the same journey as many others, still relatively early in the process, but cognizant of the challenges. We offer some approaches we have taken with the ultimate results yet unknown. We welcome input from other JGSes who have addressed these issues successfully over time.

MNJGS began in 2015 and ran with an operating committee of three for the first several years. Our focus was on programming and that drove our activities. Ultimately our committee structure failed as one

member moved away and another faced illness. It was only then that we took the next step of creating a board.

## **Creating a Board**

We were looking for people actively engaged in genealogy who might have other skills and interests that would be relevant to our organization's needs. We found several prospective board members who attended the IAJGS conference. Another prospect had done presentations on her work locally and was known to us through other activities. Yet another was a new member and new to the area. When we researched her background as genealogists are wont to do, we saw a likely candidate. We explored the interest of these prospects, and they said yes! We began this second period in our history with a board of six, a new president and a commitment to sharing information, training board members, and spreading responsibilities throughout our group. These strategies were targeted at building an engaged and knowledgeable board with each person assuming active roles in the organization.

## **Training and Backup**

During the period prior to the creation of the board, many of the tasks were assumed by the remaining committee member. With a new board, the focus was on training new members to assume some of those functions. That meant creating training materials, often slides with screenshots on topics related to Zoom, and email and website software. The person familiar with the tasks took new members through the steps and then played an oversight role, remaining available as questions arose. Our core principle was that each person on the board should assume some tasks, enough to challenge but not overwhelm, and be trained and supported in accomplishing them.

One thing to consider when training is building backup. For example, you will want to make sure that at least two people understand how to set up and run a Zoom meeting, make a timely change to the website or send out an email for an event.

## **Shared Information**

A second element in our approach was to create a shared knowledge base by having a common location for shared information. The alternative is each person has individual files related to his/her functions which complicates handoffs to new board members and the sharing of information between members. A shared drive is an important step in having key information easily available and not being excessively reliant on one person, an important element in sustainability.

There are several ways you can share information. Alternatives include Google Drive, OneDrive or Dropbox. We opted for OneDrive, and everyone was provided access.

So, what goes into a shared drive? We include board meeting materials which they access from the folder prior to a meeting, information on programs, publicity, handouts, logos, training and organizational documents.

So how does this relate to sustainability? We want board members to know our membership and financial trends. We report on both at each meeting, and they remain accessible in our common files.

Speaker agreements and press releases contain information that many of our board members work with to set up events, send emails, provide publicity, send honorariums etc. We want each person to be able to access the critical information that he or she needs as well as prior templates if they take on a new responsibility.

## **Understanding Links Between Functions**

Remember that leader we mentioned who understands the big picture? That big picture is a system and to ensure a system works well, you need to understand how the pieces interrelate. When one person assumes most of the tasks, they quickly understand the interrelationships. If they forget to do one thing, they can't do the next. It is these interrelationships that often make it difficult to separate one task from another to hand off to someone else. It is also the reason a do-it-yourself personality often finds it easier to assume too many of them. One of the challenges of building a sustainable JGS is that you need to split up functions among multiple people, yet make sure you maintain an understanding of those interrelationships through communication and planning. Everyone on the board needs to share that understanding of the big picture.

MNJGS has created several tools that help us share information and understand the sequential nature of our tasks-- how one person must complete his or her task before another can proceed. For example, we need the bio and description of the program from our speaker before we can write a press release. Using that information, we can then set up an event on our website with a link to RSVP. And we don't want to send out the press releases until the website event is set up with a live link for people to RSVP. We all need to understand our interdependencies and actively communicate. Regular board meetings are an important part of this communication.

You can read about some of the ways we create shared information and identify sequential handoffs in the article titled *Program-Organizational Tools and Processes*. Most important is a calendar that maps out the tasks by sequence and function (see [Planning Calendar](#))

So, we've focused on the following approaches:

- Building out an initial board
- Training, support and backup
- Shared information
- Spreading out responsibilities

Are we there yet? There is much to play out before we can deem our efforts successful. We are, however, aware of the challenges and know that these are steps along the journey. It is our hope that they in turn will lead to smooth transitions in leadership in our future. To consider ways to engage future leadership see [Sustaining a JGS: Building Leadership](#).