

**Genealogical & Historical Council of Sacramento Valley**  
**Discussion Session Notes – March 7, 2009**

**What to Include in a Society Handbook**

- ❖ Two types of handbooks:
  - Handbook for officers, board members, and committee chairmen
  - Handbook for members
- ❖ Insurance information
- ❖ Officers' responsibilities and job descriptions
- ❖ Bylaws, standing rules, policies
- ❖ History of the organization
  - List of past presidents
  - List of charter members
- ❖ Mission statement or purpose statement
- ❖ Meeting time and place
- ❖ Contact information
  - Mailing address, phone number, website address, etc.
  - List of contact persons
- ❖ Description of library holdings
- ❖ Inventory of society-owned assets (equipment, etc)
- ❖ Procedures for joining and renewing, dues rates
- ❖ Protocols - dress code, no smoking rules, food rules
- ❖ Newsletter – format, policies/guidelines on content, deadlines
- ❖ Business Calendar and Deadlines
  - Appointment of nominating committee, elections
  - Seminars and special events
  - Dare dues are due, and date dues are past due (membership drop)
  - Deadlines for paying major bills – insurance, etc.
- ❖ Speaker policy, amount of honorarium paid, etc.
- ❖ List of organizations that your society belongs to – FGS, CSGA, Council, etc.
- ❖ Record of past offices and chairmen (for reference in writing “in memoriam” when a member passes away)
- ❖ List of projects
  - Completed projects
  - Projects in progress
  - Future project ideas
- ❖ User guides for operating equipment (projectors, computer software, etc.)
- ❖ Membership List
- ❖ Organization chart
- ❖ Flow charts for work/information that flows between officers/charimen