



BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS (BIGWILL)

POLICY AND PROCEDURES MANUAL

This manual has been designed for the use and benefit of the British Interest Group of Wisconsin and Illinois (BIGWILL). The Executive Board must approve any other use of this document.

Copy #: _____

Control Signature: _____
(First Vice-president's signature in blue ink)

Interim Approval Date: _____

Interim Approval Signature: _____
(First Vice-president's signature in red ink)

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

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SECTION I

BOARD OF DIRECTORS

DRAFT

Jan. 07



BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: DUTIES COMMON TO ALL OFFICERS

DISTRIBUTION: BOARD OF DIRECTORS

EFFECTIVE DATE: January 2007

- Manage *and transact* the business of the organization between general membership meetings.
- Authorize disbursements not provided for in the approved budget.
- Attend at least two (2) Board meetings annually.
- Be available by mail, fax or E-mail communication throughout the year.
- Serve as chair or member of a standing or special committee.
- Promote the organization.
- Maintain a current policy and procedures manual.
- Return the *Policy and Procedures Manual* to the Board within one month of termination of office.

Jan.

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: PRESIDENT

DISTRIBUTION: BOARD OF DIRECTORS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 20-25 Hrs/Mo.

POLICY:

The President shall preside at all meetings of the Society, including meetings of the Board but excluding Nominating Committee meetings, and shall be the executive head of the Society.

PROCEDURES:

- Preside at all meetings of the general membership and the Board of Directors.
- Be the principal executive officer with responsibility for the general supervision of the affairs of the organization and be the official spokesperson of the organization.
- Represent the organization in all matters concerning external affairs and relations with other organizations.
- Appoint, with the advice and consent of the Board, the chairs of all standing committees except the Nominating Committee.
- Be a member ex-officio of all committees except the Nominating Committee.
- Write a message to the membership for each newsletter (see sample page 6).
- Encourage growth and development of the Society
- Develop agenda for board meetings (see sample page 7).
- Conduct an annual survey of membership (see sample page 8).
- Ensure that a financial review of the Treasurer's books is completed. Develop annual budget.

PRESIDENT'S LETTER (Sample)

Looking back at 2006 we can see what a very exciting year it was for BIGWILL. We had excellent speakers at our regular meetings: S. Lynn Schofield-Dahl, Jeffrey Bockman, Jackie Torrance, visitors from England, Roger Redfearn and Clifford Staley, and Paul Milner finished up the year in November.

The highlight for 2006 was our participation in the National Genealogical Society's Conference. BIGWILL and 7 other local genealogical societies were the local hosts for the NGS conference. It was a great learning experience and a wonderful chance to mingle with, talk to, and meet some of the best genealogists in the country.

We are now busy getting ready for our conference this September 29, 2007 when BIGWILL will be sponsoring an all day seminar featuring Sherry Irvine. The conference will be held at the Clock Tower Inn/Conference Center and Water Park in Rockford, ILL. Sherry Irvine is a teacher, lecturer and author, specializing in distance research-records and methods for finding roots in England, Scotland, and Ireland. Please consider volunteering to help with this conference. There will be a sign up sheet at our regular meetings.

Scheduled speakers for our regular 2007 meetings are: Kathy Brady-Blake on "Irish Research Beyond the Basics", Greg Peck talking about his book, "*Death Beyond the Willows*", Dave and Rick Dexter on "Surnames and One-NameStudies", and Dave McDonald talking about "Wisconsin: Settlement, History and Resources: An Overview".

As you can see, our society has lots of exciting projects in which our members can be involved. However, the priority at this time still remains the Sherry Irvine Conference. I hope to see all of you there, not just to demonstrate support for the society, but also to learn.

_____, President
(President's name)

SUGGESTED BOARD MEETING TOPICS

- Budget
- Membership development
- Society activities
- Programs and publicity
- Publications and periodicals
- Treasurer's report
- Review minutes from last board meeting

SUGGESTED AGENDA FOR REGULAR MEETINGS

- Treasurer's report (read by Treasurer).
- Committee reports:

Standard
Programs
Membership
Newsletter
Publicity
Library

Optional
Nominating
Refreshments

Jan. '01 DRAFT

ANNUAL SURVEY (Sample)

Member Name (Optional): _____

1. Which program gave you the most helpful information during the last year?
2. What project did you feel was the most beneficial to the Society during the last year?
3. What research trip would you like to see planned for the coming year?
4. What 3 topics would you most like to see as a program?
 - a) _____
 - b) _____
 - c) _____
5. Do you submit queries? _____ Yes _____ No
6. Do you own a computer? _____ Yes _____ No
7. Do you currently receive the newsletter by E-mail? _____ Yes _____ No
If you answered 'No' and would like to receive the newsletter by E-mail, please fill in your E-mail address. _____
8. What suggestions do you have to increase our membership?
9. How much time do you devote to actually working on your own genealogy?
10. How much time would you be willing to donate to society projects per month?
11. What committee(s) would you be willing to serve on?
12. Would you be willing to serve as a co-chair for a committee? _____ Yes _____ No
13. Do you have any ideas for fund raising projects?
14. Would you be willing to volunteer at the Nippersink Library on a Saturday afternoon after the regular meeting?
15. What, in your opinion, was the most exciting thing our Society has done?

16. On what project would you like to see the Society focus its attention?

17. Might you be willing to hold an office or serve on the board in the future?

Yes No

Jan. '07 DRAFT

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: FIRST VICE-PRESIDENT

DISTRIBUTION: BOARD OF DIRECTORS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 10-15 Hrs/Mo.

POLICY:

The First Vice-President shall have and exercise all the power and duties of the President in the absence or disability of the President or under the direction of the President. The First Vice-President shall act as Program Chair and oversee all fund-raising activities.

PROCEDURES:

- Assume the presidency in the absence, incapacity, or resignation of the President.
- Schedule future speakers for each regular society meeting.
- Prepare a copy-ready schedule of programs and submit it to the President, Newsletter Editor and Membership Chair.
- Ensure that a confirmation letter (with a map) is sent to all non-member speakers (see page 12).
- Request a biography, any equipment needs and contact information from speakers.
- Ensure meeting room is set up appropriately and that necessary equipment is set up for the speaker.
- Determine who will introduce speaker in advance and ensure speaker is properly introduced at the meeting.
- Send a thank you letter to the speaker within one month after their program (see page 13).
- Initiate and oversee all fund-raising activities for the organization.
- Present a yearly report to be published in the January issue of the newsletter.

First Vice-President con't

- Distribute controlled copies of *Policy and Procedures Manual* to board members (see page 14).
- Ensure the return of controlled copies of the *Policy and Procedures Manual* at the end of board members' terms of office.

Jan. 07 DRAFT

SPEAKER CONFIRMATION LETTER (SAMPLE)

British Interest Group of Wisconsin and Illinois
P.O. Box 192
Richmond, IL 60071

(Date)

Speaker Name
Speaker Address
Speaker City, State Zip

Dear (Mr., Ms. or Speaker First Name):

This is to thank you for accepting our invitation to speak at our (date) meeting. You, as our speaker will be on the agenda at (time), speaking on (topic or lecture title). We expect your program to take forty-five minutes to one hour.

If you have any materials that require copying, please send those to me in advance. I understand that you do/do not require any visual aid equipment. (If the speaker requires an overhead, slide projector, podium or table, confirm the request at this point.) We understand that your fee is \$.

Our meeting will be held at Grace Lutheran Church, 6000 Broadway St., Richmond, IL. A map is enclosed for your use.

We would appreciate a brief biographical sketch that we could use in our publicity for your program by (date due). I have enclosed a self-addressed stamped envelope for your convenience.

If you have any questions, please contact me at (telephone number) or (E-mail).

Sincerely,

Name
First Vice-President

Enclosures: map

SPEAKER THANK-YOU LETTER (SAMPLE)

British Interest Group of Wisconsin and Illinois
P.O. Box 192
Richmond, IL 60071

(Date)

Speaker Name
Speaker Address
Speaker City, State Zip

Dear (Mr., Ms. or Speaker First Name):

Thank you so much for sharing your extensive knowledge of (topic) with BIGWILL at our last meeting. Our members enjoyed your program and learned a lot.

(If possible, mention some points regarding the lecture that you remember or found interesting. If you did not attend, you may wish to contact someone who did attend for some input.)

We enjoyed meeting and visiting with you, and hope that the meeting was as enjoyable for you as it was for us.

Sincerely,

Name
First Vice-President

Distribution Log of Policy and Procedures Manual

Position	Copy #	Date Distributed	Date Returned
President	A		
First Vice-President	B		
Second Vice-President	C		
Secretary	D		
Treasurer	E		
Director	F		
Director	G		
Director	H		
Refreshments Chair	I		
Newsletter Editor	J		
Webmaster	K		
Librarian	L		
Nominating Chair	M		
Publicity Chair	N		
Historian	O		
Publication Chair	P		
Volunteer Coordinator	Q		
Ways and Means Chair	R		

Jan. 01 DR/EM

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: SECOND VICE-PRESIDENT

DISTRIBUTION: BOARD OF DIRECTORS

EFFECTIVE DATE: January 2007 ESTIMATED TIME: 10-15 Hrs/Mo.

POLICY:

The Second Vice-President shall serve as the Membership Chair and oversee the membership function of the Society according the guidelines set down in the Society's by-laws.

PROCEDURES:

- Serve as the chair of the Membership Committee and as the Society's Historian.
- See that the membership records of the organization are maintained and preserve historical membership records of the organization.
- May appoint subcommittees for the following activities: (1) meeting attendance records: (2) name tags for members and visitors: (3) membership packets; (4) delinquent members record.
- Provide membership mailing labels as needed.
- Encourage new memberships by advertising
- Hand out or mail membership brochure (see appendix page 62) to all visitors at the regular membership meetings.
- Maintain a membership register with a unique number for each member. Once assigned, these numbers shall not be reused (see page 17).
- Receive and process all membership applications.
- Reflect membership status and subcategories, e.g., F = family, I = individual, C=charter.
- Distribute a copy of all membership applications to the President and Treasurer.

Second Vice-President con't

- Assign a host or hostess at all regular member meetings to greet visitors and new members and explain procedures to them, i.e., refreshments, sign-in log, and nametags.
- Ensure that nametags are available for members at all meetings.
- Ensure that visitors and new members are introduced both formally during business meeting and informally to other members, and that they are comfortable with the seating arrangements.
- Ensure that each new member received a copy of the current society by-laws and a member surname interest list. Give them current newsletters if joining in mid-year.
- Assign a “Buddy” for new members. A ‘Buddy’ calls his new member prior to regular meetings for the first months of membership, introduces the member at meetings, and makes certain the member’s questions are answered.
- Ensure that a letter (see page 18) is sent to non-renewing members inviting them to rejoin. Include a survey to discover the reason for their non-renewal (see page 19). Assist in redrafting the letter and survey each year to keep it current.
- Ensure that a thank-you letter is sent to visitors at regular membership meetings (see page 20).

Sample Membership Roster

Adams	Kathy	205 Main St	McHenry	IL	60051	848-128-2022	ybbgeo@aol	22
Carter	David	103 Brook Dr.	Milwaukee	WI	54950	120-862-4886	xvxexwer@aol	24
Davis	Peggy (Charter)	P. O. Box 8	Milwaukee	WI	54950	608-862-8826	egleich@aol	31
Edwards	Daniel	1615 Southern Ave	McHenry	IL	60051	808-660-2242	xlyoby@aol	33
Healy	Roland	510 Coney Island Blvd	Milwaukee	WI	54950	608-284-0222	ryliwwle@aol	35
Jones	Susan and Paul (Family)	318 Rose St	Oak Park	IL	60051	826-448-2462	wiocereew@aol	37
Lawrence	Jacqueline	123 S Washington Ave.	McHenry	IL	60051	808-464-2142	Iwoeiolow@aol	39
Smith	Margaret	206 W Apple Drive	Oak Park	IL	60051	826-444-4246	oaooy@aol	10

MEMBERSHIP RENEWAL LETTER (SAMPLE)

British Interest Group of Wisconsin and Illinois
P.O. Box 192
Richmond, IL 60071

(Date)

Dear (name):

We've missed you...and we want you back! We haven't heard from you since (date membership expired) and we would like to find out what went wrong. Please take a moment to fill out this questionnaire and return it to us in the enclosed self-addressed stamped envelope. We appreciate any comments that you might offer that will help the Society improve and better meet your needs.

We hope that you will take advantage of a special offer. Two years for the price of one! That's right; you will receive our newsletter and the many other advantages of belonging to the British Interest Group of Wisconsin and Illinois for two years for the low cost of (cost of annual membership). That's how much we want you back!

The year has been busy and very exciting for us. BIGWILL joined 7 other area genealogical societies in hosting the National Genealogical Society (NGS) annual "Conference of the States" in June. Also, this summer we released *The British Genealogist's Library*, a collection of 250 reviews of books of interest to the genealogist researching their British or Irish ancestors. These book and media reviews by Paul Milner were collected from the BIGWIL newsletters.

Our big project for next year is going to be a fall conference and Sherry Irvine will be the featured speaker. Sherry Irvine is a teacher, lecturer and author, specializing in distance research--records and methods for finding roots in England, Scotland, and Ireland.

We hope that you will take advantage of this unique opportunity to join us once again in researching your ancestors! We've enclosed a membership application for your convenience.

Sincerely,

(Name)
Second Vice-President and Membership Chair

Enclosures: survey, membership application.

SURVEY (SAMPLE)

The primary reason that you did not renew your membership is:

1. Did you ever attend a BIGWILL regular meeting? _____ Yes _____ No
2. IF NO, please skip to question 8
3. Were the regular meeting programs interest and informative? _____ Yes _____ No
4. Were our members friendly and helpful? _____ Yes _____ No
5. Were you pushed too hard to volunteer? _____ Yes _____ No
6. Did you volunteer and then were never called? _____ Yes _____ No
7. Did you like our meeting location? _____ Yes _____ No
8. If No, why not?
9. Did you find the BIGWILL Newsletter useful and informative? _____ Yes _____ No
10. If NO, how can we improve our newsletter?
11. What did you like about BIGWILL?
12. What did you dislike about BIGWILL?
13. How can we improve BIGWILL?
14. Have you joined another genealogical society in the area? _____ Yes _____ No
15. If YES, which society?

VISITOR LETTER (SAMPLE)

British Interest Group of Wisconsin and Illinois
P.O. Box 192
Richmond, Illinois 60071

(Date)

(Name)
(Mailing address)
(City, State Zip)

Dear (name),

It was a pleasure to have you join us for our genealogical society meeting on (date). It's always exciting to meet a fellow genealogist and share family histories. We hope that you enjoyed the meeting and that we will see you again in the future. Enclosed please find a schedule of our programs and a membership application. Membership is not required to attend any of our programs. Again, thank you for attending our meeting.

Sincerely,

(Name)
Second Vice-President and Membership Chair

Enclosure: program schedule and membership application

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: SECRETARY

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 5-10 Hrs/Mo.

POLICY:

The Secretary shall have charge of such books, papers and other property of the Society as the board may designate and will take and record the minutes of the meetings.

PROCEDURES:

- Maintain an accurate record of the proceedings of the Board and Annual Meeting.
- Meeting minutes (see page 23) should contain:
 1. Type of meeting (regular member, board or special).
 2. Name of Society.
 3. Date and place of meeting.
 4. Officers present and absent (and any substitute if there is one named.).
 5. Reading and approval of minutes of previous meeting. Corrections should be noted in the margin of minute pages.
 6. Name of all makers of motions and the motion. (Appropriate form for recording motions is as follows: "On the motion of (name) it was resolved that the Society allocate \$150.00 for a scholarship." Or, "The motion made by Mr. Jones that the Society move their summer meetings to 9:00 a.m. Was adopted.")
 7. Hours of meeting and adjournment. (When concluding it is sufficient to say: "The meeting adjourned at 1:55 p.m. (name), Secretary.") Omit the passé statement, "Respectfully submitted."
 8. Treasurer's monthly report and committee reports.
 9. Major topics discussed so as to provide an overview of what transpired at the meeting.
- Keep and have available for reference at all meetings one book in which copies of the organization's Charter, Bylaws, *Policy and Procedures Manual* and Standing Rules are kept current.
- Maintain a current inventory of all legal documents, records, and equipment belonging to the organization.

Secretary con't

- Notify officers, committees, delegates, and the general membership of any special meetings as necessary.
- Conduct the correspondence of the organization as needed.
- Assist in any organizational mailings as requested by the officers and committees.
- Read the minutes from the last meeting (either board or regular) so that these minutes can be approved.
- Give copies of the meeting minutes to the President and the Newsletter Editor.
- Complete all correspondence necessary to the Society as directed by the board.
- Ensure that a capable replacement will be at meetings when the Secretary is unable to attend.
- Obtain the minutes from the meeting that the Secretary was unable to attend.
- Maintain current copy of tax exemption letter.
- The Secretary's file should contain:
 1. Copies of contracts, renewal dates, and legal instruments.
 2. Copies of officer and committee reports.
 3. Current budget.
 4. Copies of current and previous year's regular and board meeting minutes.
 5. Photocopies of all legal documents.
 6. Photocopy of 501(c)3 tax-exempt number.
 7. Current *Policy and Procedures Manual* and bylaws.

Sample
British Interest Group of Wisconsin and Illinois (BIGWILL)
Minutes of Regular Meeting
(Date)

Board members present: (Names)

Board member absent: (Names)

President (name) opened the meeting at 10:05 a.m. in the library. Four visitors were acknowledged: (names). Secretary (name) read the (date) regular meeting minutes. (Name) made a motion to approve the minutes: (name) second; minutes approved.

Treasurer, (name), reported that our \$439.82 checking and \$1169.68 savings balances totaled \$1609.50 as of (date).

(Name), Library Chair, said that the Society was ordering more books for the library. Also mentioned was the Society's 50-50 offer, which will provide one-half the cost of books members feel is relevant to our society with the member paying the remaining half.

(Name), Membership Chair, stated that we had 140 members.

Newsletter Editor, (name), reminded us that any queries, reports or articles must be to him by (date) in order to be published in the next Newsletter. A new list of all genealogical organizations that we exchange newsletters has been developed.

(Name) elaborated on several programs, seminars and meetings coming up that might interest the membership. The program for the next regular membership meeting will be "Irish Research Beyond the Basics," presented by (name).

MOTION: (Name) moved that \$250.00 be allocated to defray the cost of sending our FGS Delegate to the annual Federation conference. (Name) second. Motion approved.

There being no further business, the meeting was adjourned.

(Secretary's Signature)

Attachments:

- 1) Treasurer's report
- 2) Handout describing Society's 50-50 offer.

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: TREASURER

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007 ESTIMATED TIME: 10-15 Hrs/Mo.

POLICY:

The Treasurer shall have custody of the funds and securities of the Society, and act as official registrar for the Society. The Treasurer shall keep proper books of record, showing all monies received and disbursed and all assets and liabilities of the Society. These books should at all times be open to the inspection of the Executive Board. The outgoing President and the incoming President, or designees other than the Treasurer, shall conduct a financial review of the books at the end of the fiscal year.

PROCEDURE:

- Be custodian of the funds of the organization and disburse or invest them pursuant to the Board's policy or directive.
- Present a proposed budget for the next fiscal year to the Board within the first thirty (30) days of the fiscal year.
- Prepare financial reports for each Board meeting and at the end of the fiscal year.
- Make all financial records available for review within thirty (30) days after the close of the fiscal year.
- Present a yearly report (see page 29) to be published in the March issue of the newsletter.
- Notify members of delinquent dues and report such delinquencies to the Second Vice-President and the Board of Directors.
- Maintain a current membership list of all members in good standing.
- Pay all speakers after program is completed.
- Monies received at all BIGWILL events shall be counted by two people, one being a board member. The count shall agree with the receipts and bank deposit.

Treasurer con't

- Pay bills when submitted with a receipt using the Reimbursement Request form on page 27.
- Balance bank accounts in Quicken monthly.
- Maintain signature cards at the bank with Treasurer's, President's and First Vice-President's signatures.
- Submit copies of bank statements and balancing sheet at the board meetings.
- Maintain current and prior years Treasurer's reports. Ensure that the Second Vice-President receives all other Treasurer's reports for historical preservation.
- Record all expenses and income, by category and date, in Quicken. The categories are typically: under Expenses: Room Donation, Office Supplies, Postage, Acquisitions, Brochures, Newsletter, Programs, Scholarship, Refreshments, Fund Raisers, Professional Memberships (Federation of Genealogical Societies and Illinois State Genealogical Society), Seminars, Donations, Expositions, Other Printing, and Maintenance Fees. Under income: Dues, Research Trips, Publications, Fund Raisers, Recycling, Shop and Share, and Other Donations, and Seminars (see page 28).
- Ensure the new signature change cards are completed correctly when there is a change of officers.

Monthly Balancing:

- Enter all checks, deposits, interest, and service charges into Quicken.
- Reconcile the monthly bank statement with the Quicken file.
- Print a monthly register report in Quicken.
- Enter the interest and service charges in the checkbook.
- Check off all checks which have cleared.
- Write the check number and amounts of the checks that have not cleared in the appropriate section on the checking balance form (see page 30).
- Total the outstanding checks and write this amount in the area noted "Outstanding Check Total."
- Check off all deposits in the checkbook that are on the bank statement.

Treasurer con't

- Total all deposits NOT on the statement and write this amount in the space marked "Outstanding Deposits Total."
- Fill in the checking balance as shown by the bank on the balancing form. Add the balance of outstanding deposits and subtract the total outstanding checks. The ending balance should match the balance in the checkbook to the penny. If not, double-check the math.
- If there are unresolved problems or discrepancies, bring the problems to the immediate attention of the President who will either assist or delegate another to assist in solving the discrepancy.

Additional Information for Treasurer:

- Savings: Add the interest to the balance of savings in the passbook. Match deposits and withdrawals to the statement. On balancing sheet, (see page 30) add outstanding deposits and subtract outstanding transfers to bank balance. The balance on the sheet should match the passbook balance to the penny. If the account does not balance, contact the President for assistance. Most of the society money should remain in the savings account so that the money can earn interest. At least once during the year, call other banks and check their interest rates to ensure that we continue to earn the best possible interest. Submit these figures to the board.
- Financial Review: A financial review will be performed by the incoming and outgoing Presidents or their two designees each year. The financial review should include but is not limited to:
 - ✓ Checking for instances where accountability was not stated
 - ✓ Ensure the expenditure matched a budget category
 - ✓ Incomplete information on the expenditure/purchase
 - ✓ Arithmetic discrepancies
- Books: The Treasurer's books shall be open for inspection at all time as requested by the President.
- Expenditures: All expenditures must benefit the Society as a whole. All expenditures must be submitted on a reimbursement request (see page 27) with a receipt and with board approval prior to payment.

Reimbursement Request

Date: _____

Member name: _____

Please make check out to:

Purpose of purchase:

Amount of check: _____

Board approved: _____
(Signature of President)

Receipt attached: _____ YES _____ NO

If no, why not? _____

Paid: _____
(Date) Check #: _____

Jan. 01 DRAFT

Treasurer's Monthly Report

BIGWILL MONTHLY CASH FLOW

JANUARY 2007

INCOME

INTEREST INCOME	5.67
DUES	878.30
PUBLICATIONS	200.00

TOTAL INFLOWS 1,083.97

EXPENSES

DONATION, ROOM	50.00
OFFICE SUPPLIES	55.80
POSTAGE	
NEWSLETTER	125.00
MEMBERSHIPS	25.00
PETTY CASH	50.00
CHARITY	50.00
INSURANCE	100.00
ACQUISITIONS	50.00

TOTAL OUTFLOWS 505.80

NET TOTAL 578.17

Jan. '07 DRAFT

Expense (sample)

Date	Programs	Refreshments	Bake Sale	Publicity
Oct.	60.00	10.59		68.45
Nov.	125.00			
Dec.				
Jan.	50.00			
Feb.	75.00	37.26		
Mar.	60.00			
Apr.				127.00
May	35.00			
June	50.00			
July	50.00	3.47		32.67
Aug	100.00			
Sept	50.00		98.69	
Total	655.00	51.22	98.69	228.12

Income

Date	Dues	Research Trips	Publications	Bake Sale
Oct.	66.50	10.00	15.00	532.00
Nov.	125.50	135.00	36.00	
Dec.				
Jan.		17.50		
Feb.	10.00		45.00	
Mar.	67.50	66.00	30.50	
Apr.		70.00	20.00	
May	25.00			
June	5.00	30.00	17.50	
July		34.00		
Aug	10.00		17.50	
Sept	146.00			
Total	455.50	362.50	181.50	532.00

SAVINGS BALANCE

Date: _____

Statement Balance: _____

Outstanding Deposits: _____

Outstanding Transfers: _____

*Ending Balance: _____

*Passbook Balance: _____

Date: _____

Outstanding Checks: _____

Check #	Amount
_____	_____
_____	_____
_____	_____
_____	_____

Checking Balance

Statement Balance: _____

Outstanding Deposits: _____ +

Outstanding Checks: _____ -

*Final Balance: _____

*Checkbook Balance: _____

Total: _____

*Must match to the penny.

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: DIRECTORS

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 5-15 Hrs/Mo.

POLICY:

The board shall consist of the officers and three (3) elected Directors. Directors shall take an active role in promoting the goals and projects of the Society.

PROCEDURES:

- Represent the will of the membership, even if that position is in conflict with the Director's opinion on the issue.
- Attend at least two (2) board meetings annually.
- Participate actively in strategic planning, overseeing the health and direction of the Society.
- Represent the Society at the request of the President.
- Function as a co-chair for a standing committee (optional).
- Serve on at least one (1) committee.
- Assist the Society, when able in events, projects, and activities.
- Present reports, make recommendations, and vote on Society policy and program issues at the board meetings.

SECTION II

COMMITTEE CHAIRS

Jan. 07 DRAFT

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: PROCEDURES COMMON TO ALL COMMITTEE CHAIRS

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

POLICY:

Committees, standing or special, shall be appointed by the President as the Society or Board shall from time to time deem necessary to carry on the work of the Society.

PROCEDURES:

- Attend board meetings as requested by the President.
- Meet with committee members as often as necessary to complete responsibilities.
- Coordinate with the President to obtain members.
- Submit reimbursement requests with receipts (see page 27).

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: LIBRARIAN

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 5-10 Hrs/Mo.

POLICY:

The purpose of this committee shall be to acquire and inventory genealogical, and related historical and biographical materials (books, CDs, newsletters, journals) as directed by the Society.

PROCEDURES:

- Maintain a current inventory of the BIGWILL holdings at the Nippersink Public Library (see page 35).
- Determine amount allotted by the Library and by Society for new materials.
- Obtain suggestions from the Society for purchases and announce at a regular meeting that a purchase will be made.
- Meet with other committee members to determine purchases.
- Coordinate purchases with the Nippersink Public Library
- Maintain a detailed list of purchases made. Distribute to the President and Newsletter Editor.
- Prepare an annual report to summarize the committee's activities for the year and submit it to the board by the February meeting.

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS
SAMPLE ACQUISITIONS LOG

DATE	TITLE	AUTHOR	PUBLISHER	ISBN	DONATED OR PURCHASED	DONOR	COST
Jan 2007	Digging For Roots	Julius K. Hunter	St. Louis County Library	None	P		5.00
Nov 2006	Catherine, The Queen	Mary M. Luke	PaperBack Library	1-234-12345-1	D	Book Exchange	

Jan. '07 DR

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: NEWSLETTER EDITOR

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 20 Hrs/Mo.

POLICY:

The Newsletter Editor shall oversee the production of the Society's bimonthly newsletter received by all members and to others as the Board may direct.

PROCEDURES:

- Prepare the newsletter by the first day of January, March, May, July, September, and November.
- Accumulate materials to be considered for future publication. Materials should be submitted to the editor as requested during the month prior to publication.
- Publish items specifically requested by the Executive Board.
- Maintain a current list of societies with whom we exchange newsletter.
- Compile two forms of the newsletter, a printed and a PDF (electronic) version.
- Each issue, printed and electronic, should include the following items:
 - ✓ Name and official address of Society.
 - ✓ Volume, issue number and date (month/year).
 - ✓ Editor's name and contact information.
 - ✓ President's letter.
 - ✓ Notice of date, time, place and program for (at least) the upcoming quarter.
 - ✓ Announcement of upcoming activities, fundraisers, exhibits and new developments of interest to members.
 - ✓ Names, Addresses, ancestor surnames and areas of interest of new members.
 - ✓ Brief report on special events such as conferences and seminars.
 - ✓ Reports on important decisions made by the Executive Board.
 - ✓ Credit for origin of articles included in newsletter.
 - ✓ E-mail address and website address.
 - ✓ Proposed changes to bylaws.
 - ✓ Approved changes to the *Policy and Procedures Manual*.

Newsletter Editor con't

- The January issue should also contain the slate of candidates elected at the November meeting.
- The November issue should also contain the following:
 - ✓ Nominations.
 - ✓ Membership form and dues notice.
- The printed newsletter shall not use extra-cost options, such as four-color printing, and most shall not weigh more than 1 ounce.
- The PDF (electronic) newsletter may include additional articles and four-color printing since the web provides the society with the ability to distribute an enhanced version of the basic newsletter, at little or no additional cost.

Board note: The board recognizes that not all members will choose to take advantage of the electronic version of the newsletter, but recognizes that the decision of whether or not to receive the (possibly enhanced) electronic version is entirely up to each individual member.

Jan. '01 DRAFT

PREPARING COPY FOR PRINTING

The following suggestions for preparing copy have been taken from the Federation of Genealogical Societies' *Guide for the Organization and Management of Genealogical Societies*, Edited by Sandra Hargreaves Luebking (Austin, TX: Federation of Genealogical Societies, 2000) Exhibit 19, p. 91.

DO use black ink; no blue or pastel colored inks, pencil, or ballpoint pen.

DO NOT shade areas with pencil, crayon or paints.

DO NOT print on very lightweight, erasable bond, or colored papers.

DO use a very white paper of at least 20-pound weight.

DO keep the degree of darkness (density) of the print as consistent as possible and use a liquid cover-up correction fluid if necessary.

DO allow as much clear margin around the edges, top, and bottom, as possible. At least one-half inch is preferable.

DO NOT use a copy as an original. A little quality is lost from each generation of copy.

DO keep the original for future reprints.

DO NOT allow dirt to get onto the original. As a general rule, what you see is what you get.

DO NOT use large black areas in the layout if you can avoid it. Those who must handle your copies will thank you, since printing ink dries slowly, especially when applied over a large area.

DO keep your layout clear, neat and as open as possible. DO NOT use too many different fonts on a page of text.

DO NOT use pictures from newspapers. They reproduce poorly.

DO NOT use colored photographs. Most black and white photos reproduce well.

DO NOT use staples. Staple holes will show as black dots on printed material.

DO check copyrights. The printer cannot accept legal responsibility for reproducing copyrighted material.

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: WEBMASTER

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 15 Hrs/Mo.

POLICY:

The Webmaster will be responsible for the creation and maintenance of the Society's web site.

PROCEDURES:

- Coordinate, plan, and implement the overall web site.
- Obtain suggestions from the President and Board for material for the web site.
- Post pertinent information regarding Society meetings and programs.
- Distribute the electronic version of the BIGWILL Newsletter.
- Maintain the BIGWILL Newsletter book reviews.
- Maintain the BIGWILL members' surname interest list.
- Promote the use of the Society's web site among the membership.
- Ensure sensitive or classified information is not inadvertently released.

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: NOMINATING CHAIR

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 8 Hrs/Yr.

POLICY:

The immediate Past President shall serve as the Nominating Chair and shall oversee the activities of the nominating committee (as per the society's bylaws) to ensure a qualified and active society board.

PROCEDURES:

- Determine which incumbent board members are willing and able (based upon the Society's bylaws) to continue in their present position.
- Meet with the nominating committee and discuss possibilities for each open position. Keep in mind the candidates must be members of the organization in good standing.
- Select at least one candidate for each open office.
- Determine, with the committee, which member shall ask the individuals if they would consider the office.
- Communicate within the nominating committee on the status of obtaining nominees.
- Announce the slate of candidates at the November meeting, at which time additional nominations may be made from the floor.
- Conduct the voting by written ballot if there is more than one candidate running for an office. If there is only one candidate, voting shall be by voice.
- Ensure that the slate of candidates is given to the Newsletter Editor to be included in the January Newsletter.

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: PUBLICITY CHAIR

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007ESTIMATED TIME: 10 Hrs/Mo.

POLICY:

The Publicity Chair shall publicize and promote the activities and projects of the society.

PROCEDURES:

- Issue a press release regarding regular bimonthly membership meeting (see page 43).
- Mail a schedule of upcoming programs to local genealogical and historical societies, libraries, colleges, and other records repositories. Include a letter requesting that the schedule be posted or otherwise disseminated (see page 43).
- Advertise all scheduled meetings, major conferences, and other Society events. Send several brochures to regional genealogical and historical societies (see appendix page 60). Send to area newspapers, radio stations and cable television companies. Keep the Society's webmaster informed of upcoming events and post major events online at www.fgs.org/calendar.
- Meet with other committee chairs and publicity committee members to discuss publicity strategies.
- Ensure that planned publicity strategies are implemented.
- Participate in events that will enhance the Society's image as often as possible. When invited to participate in an event, the Executive Board shall determine whether the event is worthwhile, in terms of expected publicity and time; does not conflict with other Society events; and is scheduled when members are able to volunteer their time.
- Organize a special committee to spearhead Society participation in special events. This committee must determine a theme (if needed) and what will be needed to participate. The Executive Board must approve any special funding.

Publicity Chair con't

- Maintain a log of special events indicating the event, the date, the profit or loss and whether the event was successful in terms that cannot be measured by a dollar amount. For example, the conference might be considered successful if it failed to break even, but nine new members were recruited.
- Decide a theme or format of the event. For example, whether to sell rummage or not; whether to offer a special price for an introductory membership; possibly a door prize of a one year membership; or whether or not to sell forms.
- Maintain a list of items to always bring to set up an event table. For example, banner with Society's name, publications to sell, society brochures, brochures of upcoming events, cash box, change, pens, pencils, paper, scissors, poster board, markers, scotch tape, duct tape, and table cover.
- Transfer any funds collected at special events to Treasurer.
- Prepare a written report for the President detailing each event.

Jan. '01 DRA

LIST OF ADDRESSES TO WHICH PRESS RELEASES ARE SENT (SAMPLE)

Northwest Herald Main Office
7717 S. Route 31
Crystal Lake, IL60014
Phone 815-459-4040 Fax 815-477-4960

Woodstock Independent
671 E. Calhoun St.
Woodstock, IL 60098
Phone 815-338-8040 Fax 815-338-8177

Daily Herald
P. O. Box 280
Arlington Heights, IL 60006-0280
Phone 847-427-4300

Milwaukee Journal Sentinel
P. O. Box 661
Milwaukee, WI 53201
414-224-2000

Wisconsin State Journal
Calendar Listings E-mail rhymthm@madison.com

SAMPLE PRESS RELEASE

Attn: Community Calendar

On (day), (date), (speaker name) will speak on the subject of ('program title") to the British Interest Group of Wisconsin and Illinois. This program will be held at Grace Lutheran Church, 6000 Broadway St., Richmond, IL at 10:00 a. m. (Speaker name) is both an experienced researcher and lecturer. This free program will demonstrate (description of program material) and is appropriate for both beginning and advanced level family historians. Non-members are always welcome. For additional information, contact (name) at (phone number and e-mail address).

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: REFRESHMENT CHAIR

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 5 Hrs/BiMo.

POLICY:

The Refreshment Chair shall ensure that refreshments are provided at regular membership meetings.

PROCEDURES:

- Arrive at regular member meetings early enough to set up the refreshment table and beverages. This should be done prior to the program to avoid distracting the speaker and the audience.
- Schedule volunteer members to provide desserts for regular member meetings (see page 45).
- Contact the volunteers bringing dessert approximately one week prior to the meeting to confirm. Be prepared to provide last-minute refreshments if the volunteers show up empty-handed.
- Provide (either through donation or purchase from Society funds) napkins, plastic tableware, paper plates, cups coffee, tea, juice, sugar, creamer, and service knife. Store and transport Society refreshment supplies to and from the regular member meetings.
- Ensure that the refreshment area is cleaned up after the meeting.
- Submit receipts to the board for approval and repayment by the Treasurer.
- Turn donations for refreshments over to the treasurer.

**REFRESHMENT RESPONSIBILITY SIGN UP
(SAMPLE)**

DATE	VOLUNTEER	PHONE NUMBER	E-MAIL
January 20, 2007			
March 17, 2007			
May 19, 2007			
July 21, 2007			
September 15, 2007			
November 17 2007			

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: HISTORIAN

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 7 Hrs/Mo.

POLICY:

The Historian shall collect and preserve all-important documents belonging to the Society.

PROCEDURES:

- Archive copies of all board and regular meeting minutes.
- Archive copies of all bank statements and balancing sheets.
- Archive copies of all society business records, including tax-exempt letter, 501(c)3 documents, by-laws and all revisions, *Policy and Procedure Manual* and all revisions.
- Archive a permanent file of all issues of the newsletter and other records. These may be maintained in the Historian's home so that they are easily accessible.
- Purge records per attached purge schedule (see page 47).
- Archive a list of purged items on form (see page 48).
- Distribute a list of purged items to the Board prior to destruction for approval.

PURGING SCHEDULE

PERMANENT – These items should be kept permanently:

- Financial review of Treasurer's reports
- Basic contracts
- Checks and receipts for cash paid out
- Correspondence and memoranda relating to stop payments orders and issues of duplicate checks
- General ledgers, income and balance sheets
- Deeds and other title papers
- Documents for 501(c)3 status
- Incorporation papers
- Board and membership meeting minutes
- Newsletters
- Officers' reports
- Paid and canceled vouchers
- Publicity items
- Tax records

SEVEN YEARS – These items should be kept for seven years, and then destroyed:

- Budgets
- Cash records
- Record of materials issued and received
- Contracts and agreements for other purposes than the purchase or sale of materials
- Deposit book and records of checks
- Obsolete designs for products
- Insurance records
- Obsolete inventory records
- List of payables and receivables
- Membership lists
- Receipts for purchases
- Sales records

THREE YEARS – These items should be kept for three years, and then destroyed:

- Committee reports
- Advertisements
- Working papers

PURGED MATERIALS LOG SAMPLE

Jan. 07 DRAFT

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: PUBLICATION CHAIR

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 7 Hrs/Mo.

POLICY:

The Publication Chair shall oversee projects of the society intended for publication.

PROCEDURES:

- Maintain a current list of proposed projects.
- Determine current project.
- Determine requirements for completion of project.
- Request assistance from the Volunteer Coordinator and President.
- Recruit two people (not members of the publication committee) to edit and proof the completed project.
- Take camera-ready book to a minimum of three printers for bids on printing/copying. Submit the quotes to the Board for approval. Accept the printer with the best price and quality.
- Determine the number of copies initially needed and order that number from printer.
- Set the price of the publication at three to five times the society's cost.
- Develop a press release (with the Publicity Chair) for the new publication (see page 52).
- Coordinate with the Publicity Chair to distribute press releases to the President, the Newsletter Editor, all regional genealogical and historical societies, libraries, state and national newsletters, local newspapers, and commercial genealogical periodicals. Develop an address list for press release distribution.
- Submit the invoice for printing and postage to the Treasurer for payment.

Publication Chair con't

- Obtain a copyright. Use the form at <http://www.copyright.gov/forms/formtxi.pdf>.
- Include a membership brochure, a publications brochure, and an invoice with each order. See page 53 for an example of an invoice and Appendix page 62 for an example of a membership brochure.
- Mail a second invoice reminder if payment is not received within two months.
- Contact area genealogical and historical societies and determine if they are willing to sell books on consignment.
- Maintain a file of orders and pending orders. Maintain an up-to-date brochure for all publications (see appendix page 61).
- Maintain a file of address of individuals and organizations that have purchased publications in the past (see page 54).
- Maintain an adequate inventory of ten copies of all society publications (see page 54 for log). Notify the Executive Board as soon as inventory falls below par level.
- Provide the Newsletter Editor with a current list of all of the society publications along with a description, price and order form (see page 52).

PROCEDURES TO OBTAIN A COPYRIGHT

Obtain a Copyright Form TX from the Library of Congress. To order forms and check the current filing fee, call 202-707-6787 or use their website <http://www.copyright.gov/forms/formtxi.pdf>. Photocopied forms and those downloaded from the Internet must be printed head to head (top of page two is directly behind the top of page one) on a single piece of good quality 8 1/2 inch by 11 inch white paper. Black ink is preferred. To achieve the best quality copies of the application forms downloaded from the Internet, use a laser printer. Forms not meeting these requirements will be returned.

Complete the copyright form entirely.

Sign the application.

Mail the completed application with the nonrefundable filing fee (check or money order) and a copy of the publication to Register of Copyrights, Copyright Office, Library of Congress, Washington, D. C. 20559-6000. Include your daytime telephone number and fax number (if available). Make certain that you send your nonrefundable filing fee, your completed application form, and copies of the publication in the same package.

Understand how the copyright registration process works. A copyright registration is effective on the date that all the required elements (application, fee and copies of the publication) in acceptable form are received in the copyright office, regardless of the length of time it takes the copyright office to process the application and mail the certificate of registration. The certificate is not required prior to publication, nor is permission needed from the copyright office to place a notice of copyright on your material.

Mail the application and copies of the work by certified mail with return receipt requested in order to ensure the materials were received.

Keep track of the date the materials were sent and the date on which the copyright is returned. You will not receive an acknowledgement that your application has been received from the copyright office as they receive over 600,000 applications annually. However, you should receive the return receipt from the post office. You can expect the copyright certificate from the copyright office within sixteen weeks of submission (normally sooner).

PRESS RELEASE SAMPLE

The British Genealogist's Library

On June 1, 2006 the British Interest Group of Wisconsin and Illinois will have *The British Genealogist's Library* available for sale. This publication includes 250 reviews of books of interest to the genealogist researching their British or Irish ancestors.

To order, send \$27.95 plus \$3.00 shipping and handling (\$7.00 shipping and handling outside U.S.). Please send check or money order payable to BIGWILL to:

British Interest Group of Wisconsin and Illinois
c/o (Name), Publication Chair
P. O. Box 192
Richmond, IL 60071

ORDER FORM SAMPLE

British Interest Group of Wisconsin and Illinois
The British Genealogist's Library

Collected book and media reviews from the BIGWILL newsletter.

Please send _____ copies @ \$27.95 each _____

S&H @ \$3.00 each (\$7.00 S&H each outside U. S.) _____

Total _____

Name: _____

Address _____

City: _____ State: _____ Zip: _____

Please send check or money order payable to BIGWILL to:

British Interest Group of Wisconsin and Illinois
c/o (Name), Publication Chair
P. O. Box 192
Richmond, IL 60071

British Interest Group of Wisconsin and Illinois
P. O. Box 192
Richmond, IL 60071

Invoice

Sold to: _____

Date: _____

Purchase order number: _____

Ordered by: _____

QUANTITY	MERCHANDISE	PRICE	TOTAL
		SUBTOTAL	
		S&H	
		TOTAL DUE	

**SHIPMENT LOG
SAMPLE**

SHIPPED TO NAME	ADDRESS	DATE

**INVENTORY LOG
SAMPLE**

**Inventory
Book Title:**

DATE	COPIES ON HAND	ORDERED	BALANCE

**Inventory
Book Title:**

DATE	COPIES ON HAND	ORDERED	BALANCE

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: VOLUNTEER COORDINATOR

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 15 Hrs/Yr.

POLICY: The Volunteer Coordinator, appointed by the President, shall recruit members to serve as volunteers on committees.

PROCEDURES:

- Know the majority of the members and encourage members to participate in volunteering.
- Maintain a file of all membership applications to be aware of member talents and interests.
- Determine and obtain (in conjunction with the President) the most suitable members to be Committee Chairs.
- Determine and obtain (in conjunction with the Committee chairs) the committee members.
- Keep a current list of Committee Chairs and Volunteers. Give the list to the President by October 15th of each year. Give a copy of their committee members or changes to each Committee Chair by October 15th of each year.
- Track volunteer's hours on the volunteer log (see page 56).
- Recommend nominees for volunteer recognition, when appropriate.
- Recognize the preceding year's volunteers with a certificate.

**VOLUNTEER LOG
SAMPLE**

DATE	PROJECT	NAME	NO. OF HOURS
-------------	----------------	-------------	---------------------

Jan. 01 DRAFT

BRITISH INTEREST GROUP OF WISCONSIN AND ILLINOIS POLICY AND PROCEDURES MANUAL

SUBJECT: WAYS AND MEANS CHAIR

DISTRIBUTION: ALL OFFICERS AND COMMITTEE CHAIRS

EFFECTIVE DATE: January 2007

ESTIMATED TIME: 5-10 Hrs/Mo.

POLICY:

The Ways and Means Chair shall raise funds for the purposes of collection, preservation, and dissemination of knowledge and information with reference to genealogical and related historical and biographical data.

PROCEDURE:

- Determine and coordinate fund raising projects based on volunteer time.
- Prepare necessary publicity for events with the assistance of the Publicity Committee.
- Notify the President of all upcoming fund-raising events and projects.
- Notify the Volunteer coordinator of any need for volunteers.
- Notify the Newsletter Editor of upcoming fundraisers.
- Prepare a report for the Newsletter Editor of upcoming fundraisers.
- Prepare a report for the Newsletter Editor and the President on each fund-raising project after the event. Include the amount raised and thank volunteers.
- Notify the Treasurer of amount raised and make certain funds are transferred to the Treasurer for deposit.
- Maintain a log of all events indicating the date, event, profit or loss, and success (see page 58).

FUND-RAISING EVENTS

SAMPLE

Jan. 07 DRAFT

APPENDIX

DRAFT

Jan. 07

CHICAGO

2006 ANNUAL CONFERENCE IN THE STATES

“They Passed This Way”

NATIONAL
genealogical
S O C I E T Y

7–10 June Chicago, Illinois, Hyatt Regency O’Hare

- More than 140 lectures, workshops, luncheons, and networking events led by recognized experts in the field
- Valuable sessions for beginner, intermediate, and advanced researchers
- Specialized programs for local, national, military, and ethnic research
- Records and technology tracks presenting the latest in high-tech innovation

—Kate Parker, Gore, Virginia



www.ngsgenealogy.org for online information and registration or call NGS at (800) 473-0060 for a conference brochure

Sponsored with the Chicagoland Genealogical Consortium:

- African-American Genealogical and Historical Society of Chicago
- British Interest Group of Wisconsin & Illinois
- Computer Assisted Genealogical Group—Northern Illinois
- DuPage County Illinois Genealogical Society
- Elgin Genealogical Society
- Lake County Genealogical Society
- Northwest Suburban Council of Genealogists
- The Scottish Genealogy Group of the Illinois St. Andrew Society



The British Genealogist's Library

Collected book and media reviews from the BIGWILL newsletter appropriate for anyone searching for ancestors in England, Scotland, Ireland, or Wales, or their descendants throughout the world.

Reviews written by
Paul Milner
as originally published in the newsletter of
BIGWILL,
the British Interest Group of Wisconsin and Illinois

Compiled by David V. Dexter



British Interest Group of Wisconsin and Illinois

BIGWILL – a genealogical society of individuals who are interested in their British Isles ancestry – invites **you** to join their society. We are dedicated to helping all members trace their ancestry in England, Ireland, Scotland, Wales, the Isle of Man, and the Channel Islands.

Some of the benefits of membership:

- Regular and special meetings dealing with different aspects of research in the British Isles
- Support and networking for all levels of researchers
- Bi-monthly newsletter to keep you up-to-date on events and resources which can help in your research
(Newsletters are normally sent to members as an email attachment; for a small additional fee, a member can receive a printed & mailed paper copy of each newsletter.)
- Free entries in the *BIGWILL Register*, a growing database of members' interests

NAME: _____

ADDRESS: _____

CITY/STATE: _____ ZIP: _____

TELEPHONE: (_____) _____ E-MAIL (Optional): _____

List Additional Family Member(s): _____

Do you give permission for BIGWILL to publish this information for the benefit of other members?

YES NO (If neither YES or NO is checked, YES will be assumed)
 New membership Renewal

About you: Surnames you are researching:

Can You Help? We love volunteers! Perhaps you can lend a hand by holding an office, helping in the library (1-3 pm after our regular meetings), using your computer, bringing cookies? Please let us know ways you might be able to help:

Membership Dues (annual; membership is on a calendar year basis):

With emailed electronic newsletters:

\$20.00 for individual regular membership
\$1.00 each for additional family members

\$ _____
\$ _____

With printed/mailed paper newsletters:

\$25.00 for individual regular membership
\$1.00 each for additional family members

\$ _____
\$ _____

Charter members

(persons who have been BIGWILL members continuously since 1993):

\$15.00

\$ _____

Additional family members are entitled to vote in all membership matters, to submit surname lists and *BIGWILL Register* entries, and to receive member discounts as applicable, but do not receive any additional mailings.

BIGWILL Register: Every BIGWILL member is entitled to one free printed copy of the 4th edition of the *BIGWILL Register*. This may be picked up at any BIGWILL meeting.

If you want a copy mailed to you, check here _____ and add \$3.00 to your dues payment.

\$ _____

BIGWILL members are encouraged to contribute \$1 each year, usually at the same time as they pay their annual BIGWILL dues, to the

Malcolm H. Stern NARA Gift Fund, a nationally supported program to finance the creation of finding aids and the microfilming of valuable research materials now preserved in the National Archives and Records Administration in Washington, D.C. Have you added \$1 to your dues to contribute to this fund?

_____ YES _____ NO

\$ _____

Please make your check or money order payable to BIGWILL. Total \$ _____

Mail form(or bring it to the next BIGWILL meeting), along with your membership fee, to BIGWILL, ATTN: Membership Chair, PO BOX 192, Richmond IL 60071-0192.

We ask that you fill out this form, even with renewals, so that we have a paperwork trail of membership dues paid after your check has been cashed. It is acceptable to write "No change" for your address, phone number, e-mail address, and surnames being researched,

but please fill out everything else. Thanks!.

If you have questions, please contact our president by email at BIGWILLGen@yahoo.com.

Note: From time to time, the BIGWILL leadership sends brief email messages to members for whom it has an email address. These messages are usually notices of interesting developments on the internet or reminders of upcoming events. **If you use email, please be sure that your email is configured to allow incoming messages from both <bigwillgen@yahoo.com> and the BIGWILL webmaster, <rklittle@wisc.edu>.**

Jan '07 DRAFT