Genealogy Society Town Hall

Monday
14 December 2020

7:00 pm – 10:00 pm
Central

Goal

Empowering genealogy societies to improve or migrate their existing website to a new platform.

- Overview

- Project Management

- Needs Assessment

- Options

- Going Forward

Town Hall Rules

- This Zoom meeting will be recorded and made available by 12:00 noon Tuesday 15 December

- All registrants will receive a copy of the handout and a link to the video via email. YOUR EMAIL ADDRESS **WILL NOT** be added to my marketing mailing lists!

- It's okay to be passionate, frustrated, and anxious about migrating your society's genealogy website. Let's also try to be kind to each other in the comments during the live presentation and discussion.

- Avoid non-Disney words in comments and when speaking.

- We WILL NOT discuss recent EasyNetSites (ENS) issues except for options available to migrate your society to a new platform from ENS.

- Troublemakers, spammers, Zoom bombers, and others will be dismissed.

- No blame, no shame.
- There will be NO WAGERING allowed!
- Have fun, relax, and LEARN!

Overview

- The situation is NOT as dire as you might think.

- As a genealogy society leader, you have a fiduciary duty to your members to ensure survival of your society and its assets.

- How did we get to this point?

- There are SO MANY more options available to genealogy societies than 10 or even 5 years ago.

- Success formula

Project Management
+ Needs Assessment
+ Options Review + Action = SUCCESS

- Rinse and repeat!

Issues:

- **Where's our stuff?** Domain registration, server location, etc.

- **How do I remove our stuff?** Basic content, databases, membership module, email blaster

- **Won't this be expensive?** Low cost, no cost alternatives to expensive website design and hosting

Issues:

- **How do we get help?** Tech support for non-techies, and community resources.

- **How do we avoid this the next time?** Data successorship, vision, and plans for ongoing success.

Project Management

Here's why your society needs a basic project management system …

- How often have great ideas come out of a meeting, but no one follows up?

- You need a way to visualize projects, especially tech projects, and track details, deadlines, and contingencies!

Recommended project management programs (and they're FREE!)

- **Trello**
  https://trello.com

- **Slack**
  https://slack.com

Tips

- **Trello** is more visual and easier to use than **Slack** which is used by more tech companies and web developers

- Both platforms have great features, but some are only available with the PAID version

- Create a Project Manager position for ALL SOCIETY PROJECTS, not just website and tech projects

Needs Assessment

- Needs assessment is a review of
  1) current website assets;
  2) current website issues; and
  3) proposed solutions.

- Include "factors" such as timing, costs, and change management.

- Needs assessment is a perfect fit for projects and tasks via Project Management.

Options

- The problem with turn-key solutions and hiring a website designer/developer.

- Where are your current website assets?

  - Domain registration

  - Server location

  - Databases

  - Email Marketing / Email Blaster

Issues:

- **Where's our stuff?** Domain registration, server location, etc.

- **How do I remove our stuff?** Basic content, databases, membership module, email blaster

- **Won't this be expensive?** Low cost, no cost alternatives to expensive website design and hosting

Issues:

- **What website platform should I select?** How do I select the right platform for our society? What if we change our minds?

- **How do I migrate our stuff?** Once I've exported what I need, how do I get it up to the new platform?

Issues:

- **How do I let our members know what's going on?** Map out a change management communication plan.

- **How do we keep our website healthy?** What do we need to do going forward?

- **How do we make sure this doesn't happen again?** Don't just rely on your website platform!

Where's Our Stuff: Domain registration

- **Check current registrar**. Use the WHOIS function at Namecheap https://www.namecheap.com/domains/whois/

- **Initiate transfer.** Use the process on the registrar to transfer to a new registrar.

- **Namecheap** has amazing sales on domain names and they don't renew at astronomical rates!

- **The process can be complicated**. There is an unlock process, a waiting period, etc. You can do this, but get help if needed.

- DO NOT TRANSFER without letting your current web developer/web hosting company know!

Where's Our Stuff: Server Location

- **The WHOIS record should list server names**: Scroll down through the WHOIS record and locate the server names at the end of the record.

- **Search for the server name:** on Google OR enter the server name in the search field of your browser.

- DO NOT MOVE SERVER to new host without letting your current web developer/web hosting company know!

Where's Our Stuff: Databases

- **Databases should be on your servers:** if you have access to the backend of your servers via CPANEL, you should be able to download a backup copy.

- DO NOT MOVE OR DELETE databases without letting your current web developer/web hosting company know!

Where's Our Stuff: Email Marketing / Email Blaster

- **Some platforms have a built-in method of sending emails to society members.** Usually these are proprietary mechanisms that can be better handled by other programs like **Constant Contact** and **MailChimp**.

- Mailchimp allows up to 2,000 contacts free. Constant Contact does not have a free version. Both have non-profit discounts.

How Do I Remove Our Stuff?

- Remember, ALWAYS TRY TO CONTACT your current website host and/or developer.

- You have a better chance of getting what you need by reaching out.

- And even if you want to stay with your current host, set up a backup plan NOW!

Won't This Be Expensive?

- Not really. Let me show you how cheap and how easy it is to set up a domain and website on Namecheap. 5 MINUTES … seriously

- The problem is this: customizations and programing gets expensive.

- The more you can do on your own, the more control you'll have in the future and it will be cheaper!

What website platform should I select?

- Stick with the Ws! WordPress, Wix, Weebly or Wild Apricot. Don't forget Namecheap! It depends upon your needs ...

- **Do you need a simple quick website?** Try Namecheap, Wix, or Weebly.

- **Do you need features like membership management?** Try WordPress or Wild Apricot.

WordPress

- IMPORTANT! We are talking wordpress.org and NOT wordpress.com!

- WordPress is OPEN SOURCE which means the software is free and has a vibrant community of 3rd party app developers – and the "plugins" are often FREE as are templates!

- HOWEVER ... WordPress can be complicated and has a much higher learning curve than other platforms.

- My site GenealogyBargains.com runs on WordPress and I've been using it for over 10 years now.

- Your hosting provider can install WordPress for you and get you set up.

- I am working with Legacy Family Tree Webinars to develop a series of WordPress for Genealogy webinars in 2021.

- I am biased towards WordPress but if you hire a WordPress developer you could end up in the same situation with customized code and being at the mercy of the developer.

Wild Apricot

- Wild Apricot is billed as a membership management platform but, in fact, has:
  - Member Database
  - Website Builder
  - Event Management
  - Email & Contact Database

- Wild Apricot is not a platform with which I am super familiar. However here is a great example of a genealogy society website on Wild Apricot:

CAGGNI
Computer-Assisted Genealogy Group of Northern Illinois
https://caggni.org/

BREAK return at 8:15 central

Weebly

- Weebly is based in San Francisco and started as a way for educators and school to quickly create websites and do so cheaply or FREE!

- Weebly has a FREE module but like all FREEMIUM programs it has limitations.

- Weebly uses innovative "drag and drop" technology – no programming needed.

- Weebly has greatly improved over the years with more apps and plugins.

- Weebly is now owned by Square, an e-commerce platform. This includes SquareSpace.

- Check out Andale Market on Square https://www.andalemarket.com/

- I run a family history site at Weebly: http://henneberg.weebly.com/

Wix

- Wix is very similar in look and feel and backend operation as Weebly.

- And like Weebly, it is a freemium platform with basic functionality for free.

- Weebly is more established and may have more support, but being a new start up Wix is more innovative.

NameCheap

- Namecheap recently just entered the web hosting industry.

- I've used Namecheap for domain registration for over 10 years.

- Setting up Namecheap websites is an easy process and cheap!

What about website hosting!

- Some of the website platforms above are often bundled with hosting and there is no alternative.

- WordPress has its own hosting, but I recommend that you use an independent company.

- **SimplyHosting** is based in Chicago is a cheap, reliable hosting service owned by a genealogist.

- I have used **SimplyHosting** for Genealogybargains.com for almost 10 years. Great support, quick response. I get 3 Million hits a month and no major outages.

- Be careful with hosting companies like **DreamHost**, **BlueHost**, and **GoDaddy**. The first year is always cheap and then renews at an exorbitant amount.

How do I migrate our stuff?

- Migration is NEVER an easy process and always goes smoother if you work with your current website host.

- Smart societies always backup any data they upload to any site. Make this a habit.

- If you can't get access to your content through your current website platform …

- Manually backup what you can:
  - Save images
  - Download files
  - Copy and paste text into a Word document.
  - List your menu structure with pages, subpages, etc.
- And sometimes it is just easier to start over and start new!

How do I let our members know what's going on?

- Change management is KEY to an effective transfer to a new website.
  - Always keep members in the loop.
  - Be open to questions.
  - Email BEFORE something will happen and tell members the changes they will see.
  - Solicit feedback on changes.
  - Rinse and repeat.

How do we keep our website healthy?

- Backup, backup, backup.

- Document procedures.

- Have more than one web admin.

- Don't become beholden to any one developer or platform with over customized code.

How do we make sure this doesn't happen again?

- Create a data succession plan.

- Always backup any content you upload.

- Document HOW you built the website. Demand documentation from your web developer.

- TRAIN more than one person to take over … the "got hit by a bus" issue.

- Most importantly! Make sure your website is as independent as possible.

- Don't be cheap … spend money when needed and tap into the **GenSoc Soup** program (coming soon!)

Handout & Recording

A handout is available at
https://genealogybargains.s3.amazonaws.com/20201214+HANDOUT+Gen+Soc+Town+Hall.pdf

and the link will be sent to your registration address along with a link to the video recording for you to review as needed.

FEEL FREE TO SHARE WITH YOUR GENEALOGY SOCIETY LEADERS and POST ON YOUR FACEBOOK PAGE!

Thank You Miss Peggy!

A special thank you to our moderator, Peggy Clements Lauritzen who has been instrumental in the success of tonight's town hall.

Please visit her website
Anxiously Engaged
https://misspeggy55.weebly.com/

Going Forward

A monthly **Genealogy Society Town Hall** starting in January 2021 to discuss ongoing issues and forge new solutions for genealogy society tech success!
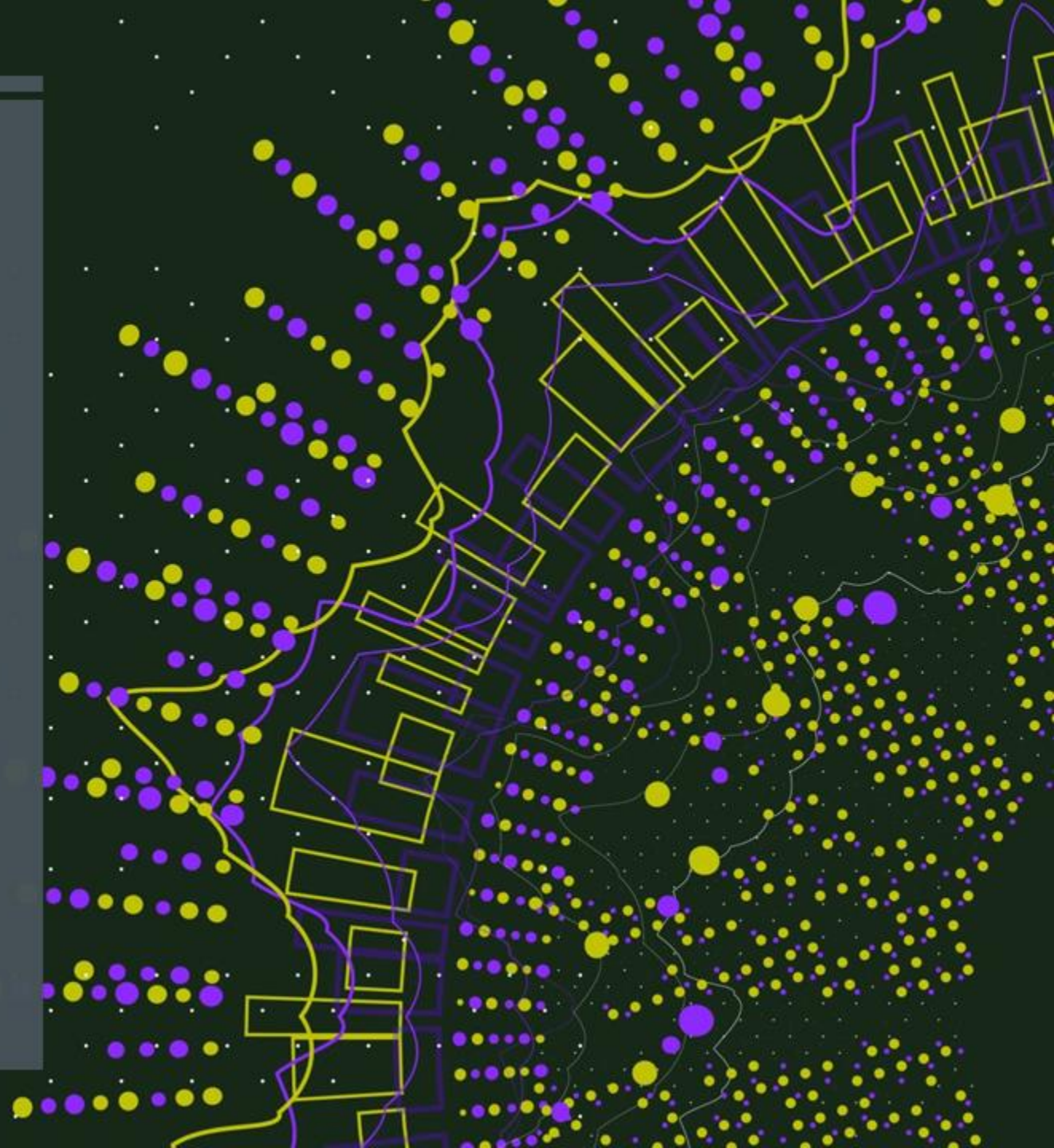
Please email me at hidefgen@gmail.com if interested.

Please know that I am invested in your success when it comes to genealogy and technology.

Feel free to email me at hidefgen@gmail.com at any time.

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