



## Project Planning

### Beginning a Genealogical Society Project

#### Define The Records

What record type are you working with? [Birth, christening, death, cemetery, biographies, etc.]

What jurisdiction do they cover? [country, state, county, town, cemetery, etc.]

What time period do they cover?

Where are the originals currently located?

Are copies available? If so where?

#### Access to the Records

It is important to develop a plan for accessing the records and keeping track of what work has already been done.

#### Define the Scope of the Project

Will you be creating an index to the records, an abstract of the records, an extract of portions of the records, a transcription of the records, a print copy, or a scanned copy of the records?

Where or how will you publish your results? In book format? In a newsletter which allows publication while still in progress? On a web page? As a digital database on a CD?

#### Set up the Project

Choose a program to compile your results. [Volunteers might be able to use various programs if they can export to a format that can be imported into the platform chosen.]

Set guidelines for the project. [Fields, standards, etc.]. It is easiest if guidelines are established at the beginning of the project and given to each volunteer. It can avoid hours of clean up. Be aware, however, that guidelines are not always followed. It is important for the project compiler to check submissions before adding them to the project.

#### The Work Team

Many hands get the work done quickly, however, it is important to have some key players. Consider looking for the following team members to keep the load of any one individual at a minimum.

**The Project Coordinator** – The coordinator is responsible for maintaining contact with the holder of the records if they are being accessed on site, distributing and collecting project packets that define the work each volunteer is to do, working with the compiler to identify problems with submissions and help get them corrected, maintaining the scheduling of the project.

**The Project Compiler** – This is the person who is going to enter the submissions into the final format for publication. This might be a database, a word processor or a webpage. In the case of a web publication you might want a separate person to convert to a webpage.

**The Project Editor** – The editor would be responsible for checking the finished project to be sure the standards were kept and adding written material to explain the project and define the records.

**The Volunteers** – Encourage as many members as possible to take part. Even a few hours will move the project along and keep other volunteers from becoming burned out. Keep in mind that sometimes the project is beyond the skills of certain members, even though they would like to help. Try to identify ways they could help, perhaps working with a partner, reading the records which can speed typing, or keeping records in order as they are being scanned or filmed.