



NZSG Annual Report to Members for the year ended 31 March 2021

The 2021 NZSG Annual Report to Members covers the period from 1 April 2020 to 31 March 2021.

COVID Lockdowns

COVID had a significant effect on the Society, both around the country where branch, interest group and regional meetings were cancelled or held online, and at the Family Research Centre (FRC) in Auckland.

COVID lockdowns and restrictions began for the FRC on 21 March 2020 with the closure of the Library after the Prime Minister asked those over 70 to stay home. The office closed on Level 4 Lockdown on 26 March with staff working remotely. We safely re-opened the office on 28 April and extended that to include a weekly Research Service presence from 5 May but the Library did not fully re-open until 8th June with the return to Level 1. On 12 August Auckland returned to Level 3 and the Library was closed again until 7 October. In total the Library was closed for 97 days with another 34 days of limited hours over a 6 month period. In February and March 2021 2 short Auckland lockdowns also closed the office and Library.

COVID consequences

Lockdown made very clear that for most organisations an enhanced online presence and the use of technology to communicate and hold gatherings and events became essential. Our email communications with members increased significantly during this period.

A great deal of work went into holding our first online AGM on 25 July which was a learning curve for us all. The bonus from this preparation and ongoing refinement was the trouble-free transmission of our 1st August Family History Month Livestream

Although Research Services was unable to operate as usual the increased use of MemList by members with research questions, and the thoughtful, helpful flood of advice from other members, including regular comment from one of the Research Services team was inspiring. The online mentoring Research service trialled during 2020 has the potential to expand.

NZSG's lack of agility to easily 'pivot' during Lockdown highlighted the extent to which we need our website to be our 'front door' rather than the bricks and mortar FRC which was effectively closed for a long period. Our comprehensive technology upgrade due to be launched by June 2021 should assist greater flexibility for member service delivery.

We received a month's COVID rent rebate from our landlord, and on behalf of the Board I was able to negotiate a further fortnight's rebate and 10% rent reduction for 2 years on our building lease.

Special thanks are due to former Acting Manager Carole Devereux for her guidance of the Society through the COVID processes, and all our staff for handling a number of unexpected developments during COVID which greatly increased workloads.

Membership

On 31 March 2021 total financial membership was 4421, compared with 4627 in 2020. This continuing decline in membership numbers (206) is less than the previous year, and similar to 2019. It does appear the decline is slowing down.

New Members survey

We have a steady membership renewal of new and re-joining members each year, replacing those who 'retire' or resign. During 2020 the highest proportion of new members joined between April and October – the lockdown periods.

260 new members, of whom 66% were women, responded to surveys during 2020. 48% were aged 40--64; with another 42% over 65; and only 10% under 40.

As with previous surveys, the majority of new members consistently state their reasons for joining are to access resources and do family research, with family history being their special interest. Most said they learned of NZSG through an internet search or from a member; and most had visited or used the NZSG website.

Strategic Plan

The NZSG Strategic Plan finalised in June 2019 contains two key Goals:

- to achieve improved NZSG membership retention and recruitment
- to increase revenue streams

In February 2020 the Board set the following Key Performance Indicators to be reported on annually, starting with the 2021 AGM:

- **Membership KPI:** 1% increase per annum in membership commencing FY20/21 to achieve a minimum 5% gain in membership for the five year period;
- **Revenue KPI:** 3% increase per annum in revenue from goods/services commencing FY20/21 to achieve a 15% gain in revenue for the five year period.

Neither KPI has been achieved due in part to the delay in Kiwi Collection and associated website and Membership systems. This has had an impact on both revenue and membership although as reported above the rate of membership decline has slowed and Kiwi Collection should revive the revenue previously provided by Kiwi on USB.

Technology Upgrade

Extensive work has continued over the last year to finalise development of a modern and sustainable information technology framework capable of delivering the core Strategic Goals for the organisation. As at end of this financial year we had upgraded key components of the technology infrastructure at the NZSG office in Auckland. We had upgraded the NZSG Library Management System to the Cloud-based version of the same Access-IT platform out

of Australia; and we had nearly completed the development of the new online Kiwi Collection system.

The effective operation of the new online Kiwi Collection was always going to be dependent upon availability of a modern, Cloud-based new Membership Management System; a streamlined Webstore capable of supporting product-based subscription services; and a modern Cloud-based accounting system. Hence it was also necessary for NZSG to completely replace and modernize these areas of its central operations. All these components had to be seamlessly integrated together, and by end of March 2021 we were well on the way towards achieving this objective prior to the forthcoming AGM.

(Footnote: The new technology environment went live on 1st June 2021, inclusive of the online Kiwi Collection.)

It has been a team effort to achieve all of this and our thanks go in particular to Director Tony Mort, former Acting Manager /Project Coordinator Carole Devereux and Webmaster Jan Watts whose continued hard work and skill have jointly driven the final stages. Thanks also to Membership Administrator Charmaine Hall, Director Jacqui Bridges and Vice Chair Bruce Holm for their valuable input into various aspects of the Technology Upgrade.

Member Services

A group of highly valued members are those who manage our range of record collections providing significant member services through which members share resources and gain family research benefit. COVID appears to have affected membership use of these services in various ways:

- School Look Ups had quite a busy year possibly due to COVID / lockdowns;
- First Families report the highest level of submissions in 2021 for a long-time, as well as a much higher level of research enquires during 2020/21 mainly from new members;
- Land Research services were affected by the FRC closure as no requests were received between April-June 2020.
- Certificate Collections_contributions increased during the past year, but fewer enquiries have been received. This may be attributed to the COVID, or a general downward trend in interest in the collection

As stated previously in the 2020 Annual report, when the Technology upgrade is completed, the Board wishes to improve the technology underpinning these services in ways which will help both the officers and our members.

Research Services

The total number of requests processed during this year was 417, slightly down on the previous year's total 432, but a good result considering COVID. The weekly Research Service presence during most of the Lockdown proved to have been worthwhile, as was the online mentoring trial.

Our thanks to Peter Krafft who led that trial and was often present during Lockdown, but has now retired to the Waikato, and Research Services Officer Elaine Bell who is retiring after 18 years in the role. Both were skilled, knowledgeable researchers who've assisted many members with their research queries. As Elaine says: "Requests for research assistance can usually be answered using the combined knowledge and experience of the Library volunteers, while at the same time we endeavour to direct members towards where they might find the answers they are looking for thus enabling them to further their own research skills."

Family History Month August 2020

While COVID impacted most planned FHM events around the country, NZSG was pleased to be able to run a FHM Livestream "*A little piece of Ireland*" with excellent presenters Fiona Fitzsimons and Brian Donovan of Eneclann on 1st August. The presenters were recommended by Geraldene O'Reilly of the Irish Interest Group. 153 attended and feedback was extremely positive.

NZSG provided sponsorship for both Family History Expos which were organised by Auckland and Christchurch Libraries respectively, as well as speakers and information tables. The NZSG Genealogical Computing Group again worked alongside Auckland Public Libraries to present the Auckland Expo which proceeded as a live event on 7/8 August but with overseas speakers presenting by AVL. Canterbury members also assisted in organising the Christchurch Expo 14/15 August, but lockdown restrictions meant that event was completely AVL.

Projects Cemeteries Collection

The taskforce established last year to work its way through 1.6 million Cemetery records was interrupted primarily by COVID. We hope to be in a position to re-establish this project again in the coming months. Two other projects including the Herald Death Notices and Waikumete Plot Registers were able to be continued on a remote basis, ably managed by their Project Leaders Rob Dicks # 10780 and Robin Mossman #17624. It is noteworthy that the Herald project has reached its 10th year milestone this year, with sincere thanks to Rob and his team for such a significant contribution.

Education

The NZSG Education group have been working to implement parts of the Education Strategic Plan. Best Practice Guidelines have been published to the website which pull together elements of best practice, ethics and referencing (incorporating Barbara Wyley's simple referencing guide). Information on Copyright will be added in due course. Resources to support NZSG Branches are a work in progress, with a consultation at the Lower North Island Regional meeting providing direction on the most pressing issues.

In February 2021, four new members joined the Group to provide a wider variety of skills to the Group. Their backgrounds in education and editing/proofreading will be very useful going forward.

Ted Gilbert Literary Trust (TGLT)

Despite an apology, further correspondence and phone calls with the TGLT during 2020/21 there has been no meeting or resolution with the Trust on issues of concern.

Wellington City Council Cemeteries Review

We had a great response to our request for comments on the WCC Cemeteries review with 70 members sending in written submissions on the issue of reusable cemetery plots. These were collated by Communications Director Jacqui Bridges into an excellent summary which she presented on our behalf to the Review Committee at an oral hearing in February.

Branch Celebrations

Wellington Branch celebrated their 50th Anniversary with a well-attended and enjoyable lunchtime function on 31st October 2020.

National Manager NZSG appointment

The Board re-scoped the Manager's role during late 2020 and advertised a National Manager NZSG position in early 2021. Julian Pinfold took up the position in April 2021.

Board of Directors

2020 opened with the nomination of three members for four positions on the NZSG Board of Directors which meant a vacancy needed to be filled at the AGM which under COVID restrictions took place as an online AGM on 25 July. The Retuning Officer suggested the vacancy be filled by calling for Expressions of Interest which resulted in two 2 applicants, both of whom were approved by the Board on 11 August. As the Society's Rules allow, one applicant was co-opted and another appointed

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During 2020/21 the Board of Directors has comprised:

Chairperson	Mary Shadbolt Wellington/Auckland
Vice Chairperson	Bruce Holm Christchurch
Directors:	Jacqui Bridges Wellington (from August 2020)
	Patricia (Trisha) Dunn Auckland (from July 2020)
	Peter Gibson (Finance) Wellington
	Sarah Hewitt Wellington (from July 2020)
	David Jack Timaru (to July 2020)
	Gill Knox Wellington (to July 2020)
	Tony Mort Wellington
	Connal Townsend Auckland (from August 2020)
	Jillian Williams Hawera (to July 2020)
	Robyn Williams Auckland
	Christine Young Waikato

During 2020/21 only two Board meetings were held at the FRC – July and November 2020. The rest – May, August, October 2020 and February 2021 were conducted via an audio-visual link. Considerable savings ensued.

Staff

There have been a number of staff changes during the year.

NZSG Manager:	Carole Devereux (Acting to April 2021)
Library Co-ordinator:	Volunteer Robyn Williams (to October 2020) Matthew McGovern (October 2020 – April 2021)
Membership Administrator:	Charmaine Hall
Accounts Administrator:	Hetti Gamage (to August 2020) James Young (August /September 2020) Teresa Llamas (from September 2020)
Projects Co-ordinator:	Carole Devereux
Webmaster:	Jan Watts
Honorary Solicitor	Harold Kidd, BA, LLB
Auditors	William Buck Audit (NZ) Limited

Awards

The following awards were given during the year:

Merit Award

Joan Bray #9466 – For combined service for over 30 years to Hutt Valley Branch and as the NZSG School Records Officer

Alison Glenie #6137 - For service as a team leader at the FRC for more than 10 years and Isle of Man contact for over 20 years

Judith Lyon #15768 – For service as FRC team leader, FRC Volunteer for 17 years, FRC Certificates team for 11 years and Howick Branch Committee for 19 years

Long Service Award

Janise Slater #8399- For service to the Canterbury Branch as Committee member from 1995-2018, and at various times Treasurer, Branch Librarian and Convener

NZSG Awards

Lisa Duggan #23609 – For service writing the column *Genealogy on the Internet* for *The New Zealand Genealogist* for more than 40 issues

Lynne Florence #17088 -For service as a volunteer at the FRC for more than 10 years

John Lindsay #21198 -For service as a volunteer at the FRC for more than 10 years

Gillian Knox #22255 -For service on the NZSG Board for six years

Betty Rush #6549 -For service on FRC Certificates team for 12 years

Jillian Williams #15588 -For service on the NZSG Board for three years

Jill Wood #13873 -For service on FRC Certificates team for 12 years

Rex Wood #13873 -For service on FRC Certificates team for 12 years

Branch Awards

Hutt Valley Branch: Christine Edney #12737 -For service as Membership Secretary and on the committee for seven years

Nelson Branch: Barbara Wells #13425-For service as Treasurer and Newsletter Editor and on the committee 2013-20

Te Puke Branch: Graham Black, #21974-For service as Convener from 2010-2014 and Treasurer from 2015-2019 and as Committee Member from 2006-2019

Certificates of Appreciation

David Jack #17381-For service on the NZSG Board for two years

Jill Jackson #14682 -For service as a Committee member of New Plymouth Branch from 2015-2020

Peter Kraft #25354 -For service as a FRC team leader and volunteer 2013-2020

Barbara Pritchard #1802 -For service as a FRC team leader and volunteer

Jackie Sewell #8834 -For service as a Committee member of New Plymouth Branch from 2015-2020

Gay Swift #10636 -For service as a FRC team leader and volunteer

Certificate of Recognition

Paul Lyon -For service as a FRC Volunteer from 2016-2020

Neville Richards -For service as a Committee member of New Plymouth Branch from 2014-2020



Mary Shadbolt

NZSG Board Chairperson June 2021