



ANNUAL REPORT

Dallas Genealogical Society: 2016 - 2017

This report covers operational activities from September 2016 through August 2017 and financial activities from October 1, 2016 through September 30, 2017.

Tony Hanson
DGS President: 2016 - 2017

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September 11, 2016 - September 9, 2017

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Executive Summary

This has been another busy and exciting year for the Dallas Genealogical Society:

- We initiated a program to create a video recording of each monthly general meeting and making it available on our website. This has allowed us to more than double the number of people who are participating in our meetings.
- Two new Special Interest Groups were launched last year.
- Our highly regarded Seminars continue to attract participants. This year's attendance increased 20% compared to last year.
- We offered an Advanced Workshop with Tom Jones.
- Our members are continuing our long tradition of making historical information available and accessible:
 - We completed our Probate Record Indexing project.
 - The indexing of the McGowan Funeral Home records has accelerated.
 - We continue to add cemetery records to our online database.
- Several of our members were selected as speakers at State and National conferences.
- We hosted our 1st North Texas Society Summit focused on developing leadership strategies for Genealogy Societies in the North Texas Region and made plans for a similar event in 2017.
- Our society donated a Laptop PC, Video Projector and associated peripherals to the Genealogy Section of the Dallas Public Library.
- Our society participated in the 2016 North Texas Giving Day which resulted in a donation of more than \$5239.73 to the Cathy Nelson Hartman Portal to Texas History Endowment fund.

As I complete my time as President I look back with extreme gratitude to the many people who have worked so hard to help achieve this impressive list of accomplishments. I also look forward with optimism and complete confidence that our society will continue on its current trajectory of achievement and success.

Tony Hanson

President, Dallas Genealogical Society 2016 – 2017
5 December 2017

Introduction

The Dallas Genealogical Society is organized and operated as a non-profit tax-exempt Section 501(c)(3) organization as defined by the Internal Revenue Service. The mission of the organization is defined in our articles of incorporation and focuses on three primary areas: education; preservation; and providing support for the Genealogy Section of the J. Erik Jonsson Central Library in Dallas, Texas.

2016 - 2017 Board of Directors

The board of directors for this period assumed office on September 11, 2016 and served until September 9, 2017.

Executive Board

- **Tony Hanson** President
- **Kristin Moore** Vice President
- **Susan Rainwater** Treasurer
- **Sharon Bowles** Secretary
- **Sandra Crowley** Past President

Directors

- **Cheryl Freeman** Director of Education
- **Gloria Goodwin** Director of Membership
- **Carolyn Davis** Director of Publicity/Public Relations
- **Harmon Adair** Director of Printing & Distribution
- **Todd DeDecker** Director of Volunteer Coordination

Advisors

- **Barbara Ware** IT Administration
- **Todd DeDecker** Webmaster
- **Jimmy Walters** Sales Manager
- **Bob Lane & Linda Lane** Hospitality

Activities & Accomplishments

To educate, by creating, fostering and maintaining interest in genealogy

General Meetings

Our monthly meetings are an important component of our educational mission. They are free and open to the public and consist of a brief business meeting followed by an educational presentation of interest to our attendees. Thanks to the scheduling efforts of Cheryl Freeman, our Director of Education, we were honored to have the following speakers and presentations.

- **September 10, 2016:** Our speaker was Shirley Sloat with special guest Estelle Adams. Shirley's presentation was titled *'It takes a village..... to produce a book preserving the memories of the only living grandchild of two Georgia slaves who came in a wagon with nine children to Wheelock, Texas, in 1894'*. Attended by 33 members and 21 visitors. The business meeting was viewed 38 times on YouTube.
- **October 1, 2016:** Our speaker was Glenn Kinkade, who discussed *'The Perils, Paradoxes and Pitfalls in Probate Records'*. Attended by 39 members and 1 visitor. The business meeting was viewed 28 times on YouTube.
- **November 5, 2016:** Our presentation was *'Finding German Ancestors: Their Information is Not All on the Internet'* by Bernard N. Meisner, Ph.D. Attended by 35 members. The business meeting was viewed 24 times on YouTube.
- **January 7, 2017** – This meeting was cancelled due to extreme cold weather and icy road conditions that caused numerous road closures.
- **February 4, 2017:** Our speaker was Pat Gordon who discussed *'Researching Female Ancestors'*. Attended by 53 members. The business meeting was viewed 33 times on YouTube.
- **March 4, 2017:** Our presentation was made by Brandon Murray who has been a librarian at the J Eric Jonssen Library since June 2015. He was integrally involved in the renovation of the Dallas History & Archives Division located on the 7th floor, which was the focus of his presentation. Attended by 34 members. The business meeting was viewed 65 times on YouTube.
- **April 1, 2017:** Our presentation this month was *'The Texas State Library/Archives and General Land Office at Home and On Site'* by DGS member Kelvin Meyers. Attended by 29 members and 2 visitors. The business meeting was viewed 101 times on YouTube.
- **May 6, 2017:** Our speaker was Ari Wilkins: her topic was *'Learn how to save money and time by using libraries services and collections to the fullest extent'*. Attended by 43 members. The business meeting was viewed 64 times on YouTube.

We achieved an important milestone this year by creating a video recording of each General meeting that was made available on our website within a few days of each meeting. In addition, several of our speakers consented to have recordings of their presentations, which were also available for varying periods of time following their presentations.

Special Interest Groups

Interest in and support for our Special Interest Groups has continued over the past year. Total attendance for all groups for this period was 615.

- **African American Special Interest Group** has met monthly under the leadership of Lois Lilly (212 attendees)
- **Brown Bag Group** has met monthly under the leadership of Janet Khashab and Liz Kutz (46 attendees)
- **DNA SIG** has met monthly under the leadership of Mic Barnette and Barbara Ware (117 attendees)
- **Jewish Interest Group** has met monthly under the leadership of Liz Kutz (28 attendees)
- **MacGen Group** met every other month under the leadership of Happi McQuirk (36 attendees)
- **Technology Group** met September through May under the leadership of Suzan Younger (100 attendees)

Two new groups began quarterly meetings in September under the leadership of Tresa Tatyrek. These groups meet quarterly:

- **Next Generation Sitebuilder** (32 attendees)
- **Roots Magic** (44 attendees)

Seminars

While our seminars provide a substantial source of the funding for our organization, we also view them as an effective way to fulfill a portion of our educational mission. We bring nationally recognized speakers to Dallas and provide an opportunity for attendees to learn from individuals who are experts in their respective fields. Through the use of volunteers, and prudent cost management, we are able to keep the cost of attendance at a minimum, thus making them more accessible to a wider audience.

Post event surveys are sent electronically to all attendees. The results, summarized for each event listed below, have been uniformly high.

- **Fall Seminar – September 17, 2016 – Curt Witcher:** “Sources & Methods for Family History Research” - We had 92 attendees at this one-day event: 66 (72%) members, 26 (28%) non-members. 92% of survey respondents rated this event as either ‘Very Satisfied’ or ‘Extremely Satisfied’.
- **Spring Seminar - March 18, 2017 – Tom Jones:** “*Research Methods for Family Historians*” - We had 131 registrants with 128 attendees at this one-day event: 91 (69%) members, 40 (31%) non-members. 91% of survey respondents rated this event as either ‘Very Satisfied’ or ‘Extremely Satisfied’.
- **Summer Seminar – August 4-5, 2017 – Lisa Louise Cooke, Diahn Southard & Sunny Morton:** “Sources, Storytelling & DNA” - We had 102 registrants with 97 attendees at this two-day event: 84 (82%) members, 17 (18%) non-members. 95.6% of survey respondents rated this event as either ‘Very Satisfied’ or ‘Extremely Satisfied’.

Advanced Workshop

We elected to capitalize on the knowledge, expertise and reputation on Tom Jones by offering a half day advanced workshop on Friday, March 17. Due to the intimate nature of the experience, attendance was limited to 30 people. 22 members and 8 non-members participated. 92% of survey respondents rated this event as either ‘Very Satisfied’ or ‘Extremely Satisfied’.

North Texas Genealogy Society Summit

When plans were being made for our Fall, 2016 Seminar with Curt Witcher, the board recognized that, in addition to his other skills, we had an outstanding and outspoken advocate of Genealogy Societies coming to town. The board made the decision to host a North Texas Genealogy Society Summit on the day before the Fall Seminar, and Curt enthusiastically agreed to be a part of the event. This was viewed to be a part of our educational commitment and

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the board agreed to underwrite all costs associated with the event (the Texas State Genealogical Society contributed funds towards the cost of the lunch).

The event was organized by Kathleen Murray and held on Friday, September 16 at the Dallas Public Library. 37 individuals representing 19 societies from across North Texas participated. Round table discussions were held in the morning, and Curt Witcher made two presentations in the afternoon session.

Feedback was overwhelmingly positive, and a follow-up Summit was scheduled for September 28, 2017.

Annual Awards

The Dallas Genealogy Society annually recognizes individuals and organizations for their contributions towards the goals of the society. These awards are presented at our annual Awards Lunch. Additionally, the winners of the annual Writers Contest are recognized at this event.

45 members and 7 guests attended this year's Awards Lunch, which was held on December 10, 2016 in the Community Showcase Room on the 7th floor O'Hara Hall at the J. Erik Jonsson Central Library in Dallas. Admission was free for members, \$15 for non-members.

The recipients honored in 2016 included the following:

- Award of Merit: **Suzan Younger**
- Heritage Preservation Award: **Shirley Sloat & Estelle Mitchell Adams**
- Lloyd DeWitt Bockstruck Distinguished Service Award: **Curt B. Witcher**
- Volunteer of the Year: **Kathleen R. Murray**

The Rene Jackson Smith award (free admission to an upcoming Seminar) was presented to **Jimmy Walters** in recognition of his dedication and accomplishments as our Director of Sales.

This event was also recorded and uploaded to YouTube: It has been viewed 79 times.

Writing Contest

The Society sponsors an annual writing contest and offers a total of \$950 in prizes. Selected articles from this competition are published in *Pegasus, Journal of the Dallas Genealogical Society* publication.

The 2017 winner was:

1st Place – '*Defending Dicy Dillon*' – **Karen Walker**

2nd Place – Not Awarded

3rd Place – Not Awarded

Public Presentations

The Society was asked to provide general Genealogy presentations several times this year:

- Kathleen Murray and Tony Hanson made a presentation to employees of Frito Lay in Plano in November which resulted in a \$50 donation to the Society.
- Cheryl Freeman made a 'Intro to Genealogy' presentation to the Timberglen library on April 22.
- Cheryl Freeman also made a presentation as part of the April 29 Dallas Public Library Book Festival.

State/National Conference Speakers

Several members of the Dallas Genealogical Society have been recognized as authorities by the genealogical community and have been selected as speakers at the State and National level.

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National Genealogical Society 2017 National Conference

- **Ari Wilkins:** *Using the Southern Antebellum Plantation Records*

Federation of Genealogical Societies 2017 National Conference

- **Ari Wilkins:**
 - *Black and White Southern Families in Plantation Records*
 - *Free People of Color in Apprentice Records*
 - *Getting the Most Bang for Your Buck Out of the Library*

Texas State Genealogical Society 2016 State Conference

- **Mic Barnette:**
 - *Shared Chromosome Matches*
 - *Will the Correct John Smith Stand Up!*
- **Dreanna Beldon:** *Rediscover the Portal to Texas History*
- **Patti Gillespie:** *I've Got – or I'm Getting – My DNA Report Now What Do I Do*
- **Tony Hanson:** *Understanding Digital Images*
- **Bernard Meisner:**
 - *Mining the Gems in a Civil War Pension File*
 - *Finding German Ancestors: Their Information is Not All on the Internet*
- **Ari Wilkins:** *Getting the Most Bang for Your Buck Out of the Library*

In Memoriam

A copy of *'Mastering Genealogical Documentation'* was purchased and donated to the Genealogy Section of the Dallas Public Library in memory of DGS Life Member Mary Lou Wiggins.

To collect, preserve and index information related to Dallas County and its early history

Dallas County Probate Records from 1850 to the early 1900's

In 1977, members of the Dallas Genealogical Society microfilmed Dallas County Probate Case files dating from 1850 through the early 1900's. These records are available on 33 reels of microfilm.

In 2013 the Society received a Rescuing Texas History grant from The Portal to Texas History to digitize the microfilms and make them available on the Portal to Texas History at the University of North Texas. Society members transcribed the 1977 index, which was used to create the metadata for each case.

Society volunteers have been engaged in a project to determine the year range for each case, something that was not originally indexed. This involves examining the images associated with each case and identifying the earliest and latest dates referenced. In addition, the date of death of the individuals associated with each case is being identified when possible. This information is being added to metadata for each case on the Portal web site.

This effort was initiated in January 2016 and was completed in April 2017. 15 volunteers logged nearly 800 hours completing this task. The top three volunteers were:

- Joe Connelly 1541 cases, 444 hours
- Kaken Walker 931 cases, 141 hours
- John Withers 370 cases, 102 hours

McGowan Funeral Home Records

The McGowan funeral home operated in South Dallas from 1955 until the 1990's.

The Dallas Public Library holds the collection of records from the McGowan home. It is currently housed on the 8th floor in the administrative area and is not accessible to the public without prior arrangement. It contains client/deceased files which may include obituaries, photographs, funeral pamphlets, death certificates, and related materials. A small portion of the collection pertains to the administrative/office functions of running the funeral home, which held city, county, and VA contracts for local ambulances serving several nearby counties. This collection is a great resource for African-American burial practices in the late twentieth century.

Members of the African American Genealogical Interest Group have been creating a digital index of these records. A database containing information from the records that have been indexed so far has been made available on the Society website.

In October Tony Hanson created a web interface to speed up the indexing effort. This tool allows multiple to enter information at the same time, and has the added advantage of adding the information directly into the database. As a result, new records are available to the web search interface immediately after they are entered.

A total of 2331 files have been indexed by the end of August 2017.

Pegasus - The Journal of the Dallas Genealogical Society

The DGS launched *Pegasus: Journal of the Dallas Genealogical Society*, a scholarly journal, in 2013 as a replacement for our annual *Journal*.

The focus of articles published includes the following:

- Advanced methodologies and case studies emphasizing an approach to a problem
- Family histories and genealogies linked to North Texas, including those families who came from or left to settle elsewhere than North Texas

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- Historically interesting events in North Texas, including a connection with a local family
- Histories of ethnic or military groups, or of neighborhoods and houses, specific to North Texas

No issues of Pegasus were published during the period of this report.

Thanks to the efforts of Sandra Crowley, one issue was published last year:

Volume 4, Number 1 (July 2016)

- The Story of John Wesley Barnes and Edna Mollie Crawford - **Diane Barnes Gawedzinski**
- A Slave Pioneer in Dallas County Texas: Tracing Polly's Life from Slavery to Freedom – **RL Canady**
- A Case Study in Using DNA for DAR Membership: First Successful Application – **Ray Harriot**
- The Elusive Andrew Lyday, 1804–1849 – **Jana Walker**
- Alice's Looking Glass: Reflection on the Prussian Drahn's to Texas - **Vicki Welch Ayo**

The Society also utilizes the services of a layout editor to produce Pegasus. A per-page fee is paid for these services. **Tami Mize** is currently performing this service.

Printed copies are sent to members who have elected to receive them, and electronic (PDF) versions are available to all members on the website. The cost to produce and mail each printed copy was on the order of \$13 per copy. Electronic (PDF) versions become public two (2) years after publication.

The first four editions of Pegasus (Volume 1, Number 1 & 2 and Volume 2, Number 1 & 2) are currently available on The Portal to Texas History. They were digitized utilizing funds received from a *Rescuing Texas History* grant received by the Dallas Genealogical Society.

Cemetery Records

Under the leadership of Barbara Ware, Suzan Younger and other members we have continued our tradition of publishing cemetery records by maintaining a database of Dallas County burials. Our focus is on historical cemeteries, and our methodology insures that all burials (not just those with tombstones) are recorded. The 36,851 records in our database (437 were added during this period) are freely accessible to the public.

Society Records

Last year saw the completion of the 1st phase of an effort to make digital images from all past Newsletters, Journals and Quarterlies available on the website. However, many of the images were from low quality sources and are difficult to view.

This year the society accumulated copies of virtually all Quarterly Newsletters/Journals created between 1955 and 1994 and initiated plans to have them digitized and archived on The Portal to Texas History at a cost of approximately \$4100. The Dallas Public Library will make copies of the missing issues available to be digitized to ensure that the effort results in a complete, high quality set of images.

The society initiated fundraising activities in April and made plans to make the project the focus of the September, 2017 North Texas Giving Day campaign.

To assist and support the Genealogy Section of the J. Erik Jonsson Central Library in Dallas, Texas

Equipment Donation

The Dallas Genealogical Society donated a Dell XPS 13 laptop with HDMI VGA Adaptors, wireless mouse, Logitech Remote control, Acer Projector, 25' HDMI cable and backpack at the Awards Lunch in December. This equipment will be used by Genealogy Section staff members for educational presentations at the library and other locations. The total value of the equipment donated was \$1,733.47

Texas State Genealogical Society

The Texas State Genealogical Society annual conference was held in Dallas in 2016. The Dallas Genealogical Society paid to print marketing materials distributed by the Dallas Public Library in the exhibit hall, and provided refreshments at the library for the Librarians Day event held in conjunction with the TSGS conference.

Administration

Membership

Society membership levels vary throughout the year as memberships expire and are renewed, so the number of members varies from month to month.

The most meaningful measure to report is the average number of members for the reporting period, which was 431 (excluding Library and Exchange) members. For the previous year the average was 420.

A snapshot of the various membership types as of September 28, 2016 is provided below.

Category	Number
Standard: individual	234
Standard: Household	49
Associate	41
Life: under 65	3
Life: over 65	97
Honorary Life Member	1
Library	3
Exchange (Society)	38
Total:	465

Marketing

2016 Texas State Genealogical Society Annual Conference

The Dallas Genealogical Society participated as a society exhibitor at this year's conference, which was held in Dallas.

- The society provided refreshments at the Dallas Public Library for conference attendees who visited the library as part 'Librarians Day'.
- The society also had a table in the conference exhibit hall that was staffed throughout the conference. DGS members answered questions and distributed literature.
- The Society paid the printing costs associated with a handout created by the Genealogy Section of the Dallas Public Library.

Newsletter

Carolyn Davis, our Director of Publicity, continued to publish the eNews, our online Newsletter. Over the summer Tony Hanson, with assistance from Ken Johnston (graphics) and Kathleen Murray (newsletter template) redesigned the format and layout for the publication. The September 1 issue was the first to incorporate the new design.

We also welcomed Karan Marshall as our new Newsletter editor in September.

Sales

Under the leadership of Jimmy Walters, the sale of items by the society has continued at an accelerated pace.

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Corporate Contributions

DGS members have had the ability to designate the Society as a recipient of a matching corporate donation for three different companies:

- Tom Thumb Groceries (1%)
- Kroger Groceries (1%)
- Amazon.com (0.5%)

Income from these three sources was about \$556 during this period.

Grants & Fundraising

Rescuing Texas History Grant

The society received another “Rescuing Texas History” grant from The Portal to Texas History valued at \$1000 in August of 2017. The grant, and funds raised through donations, will be used to digitize the 1955 – 1994 Quarterlies/Newsletters published by the Dallas Genealogical Society. Once digitized the images will be archived on The Portal to Texas History.

North Texas Giving Day

The Dallas Genealogical Society participated in the 2016 North Texas Giving Day event with the goal of raising funds for the Cathy Nelson Hartman Portal to Texas History Endowment, a fund established to insure the continued operation of The Portal to Texas History digital archive.

The Board of Directors authorized \$2500 to be used a matching funds for the event. \$2739.73 was raised during the event, and a check in the amount of \$5239.73 was sent to the Endowment in December.

Awards

We continue to support, and benefit from, our membership in the Texas State Genealogical Society. We were an exhibitor at the 2016 annual conference held in November in Dallas. In addition, our *Pegasus – Journal of the Dallas Genealogical Society* publication was awarded 2nd Place by the Texas State Genealogical Society in their ‘Official Periodicals of Partner Societies’ category.

Insurance

The Society maintains two insurance policies, both obtained through the Nonprofits Insurance Alliance Group:

- Directors and Officers coverage
- General Liability coverage

Infrastructure

The Society continued its use of a variety of free and fee based technological tools and resources to provide information and services to our members.

Neon

Neon is a fee based commercial service offering from Z2 Systems that provides a wide range of services for not-for-profit organizations like the Dallas Genealogical Society. It is a stand-alone application that is used to provide the following services:

- Member Account management
- Seminar and Special Event Registration
- Credit Card management
- Sales of DGS products

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Vertical Response

This is a service used to create and distribute email messages. These services are provided at no cost to nonprofit organizations like the Dallas Genealogical Society.

We have utilized this service to distribute our Newsletter and to send targeted solicitations and information to our members and others who want to receive information about society activities.

Web Hosting

The Dallas Genealogical Society utilizes two fee based web hosting services. One supports our production website and the other is used for testing and development. In addition, a fee based commercial cloud based service is used to archive our collection of digital images.

Our website is now based on the widely used Wordpress platform.

Voicemail

Kall8, a fee based commercial service, is used to manage our voicemail services. This service digitally records calls made to the society and sends them as conventional email.

Online Meetings

The Society maintains an annual subscription to GoToMeeting which is utilized by officers and SIG leaders for society purposes.

Other Social Media

The society also makes use of Facebook, Twitter, YouTube, Dropbox, Hootsuite, and Google Analytics.

Storage Closet

The Dallas Public Library generously provides the DGS with the use of a storage closet located in the staff area on the 8th floor of the Dallas Public Library. An extensive cleanup of this area was undertaken that led to the disposal of extraneous copies of many society publications and sales items that are no longer marketable. After insuring that the society retained several copies for archival purposes these items were offered to attendees of the Awards Lunch at no cost. Remaining copies were recycled.

Finances

Audit Committee

As required by our bylaws (Article XI, Section 2), a financial review committee was formed to review the Society's fiscal year financial transactions in accordance with current official procedures established by the Board of Directors. The committee consisted of David Temple, Sammie Lee and Gloria Goodwin. The summary from the review, conducted in November 2016, is provided below:

The records maintained by the Treasurer for 2015 and 2016 were found to be organized and orderly. The Treasurer returned the society to the use of Quicken to better track all financial transactions and enable the generation of reports as needed. She has taken steps to retain images of invoices where appropriate.

One exception to the above process was found to be the lack of check request forms for certain transactions paid by credit card. A recommendation is made that DGS continue to use the payment request form to properly document transactions. This will protect the user and the Treasurer from any questions as the use of society funds by being able to back up each payment with officer approval.

The board subsequently modified the Payment Request form and mandated that it be used to document all credit card transactions. This process has been followed throughout the period of this report.

Financial Overview

The society benefited from a successful fund-raising campaign and the operation of three popular Seminars which generated income at the highest level seen in recent years.

The financial status of the society as of September 30, 2017 is as follows

- \$53,494 - Total Income
- \$28,285 - Total Expenses
- \$ 5,732 - Management and General Expenses
- **\$19,481 – Increase in Net Assets**

Please refer to the Dallas Genealogical Society Statement of Financial Position (September 30, 2017) for more details regarding society finances.