

### Step 3 - Identifying Important Roles

The next step is to identify what you see as the important roles that contribute to your society's success. In this step outline the key roles within your society that will serve to address your needs now and into the future. The point is to think about what roles are important in making your historical society a success and what roles are needed in the next 2-5 years.

#### Roles for the things you do well now

Identify the roles in the historical society that contribute to the current success of your historical society. Refer to your response in Step 2 where you evaluated the society position and identified what you do well.

Ask yourself who are the people in your historical society who contribute to this? What roles do they currently perform? Focus on the role/position and not the individual people in those positions. For Governance outline the leadership, strategic and key communication roles associated with the management committee that is working well for you. For society activities outline the roles that support what you do well – e.g. writing history; running programs for schools visits, collection management etc.

#### Identify the roles that you want to do differently or better

Refer to your responses in Step 2 where you outlined what you'd like to do better.

Think about the current roles within your organisation that are responsible for addressing the things that you'd like to do better. For example, it could be your President who is responsible for improving communication on strategic issues. You have identified that you want to attract more money, as the local government is no longer providing financial support. The Vice-President could therefore address the need for more money coming in. Perhaps you need to create a new position to focus on fundraising, grant writing or sponsorship.

Do the current volunteers cover all the work of your organisation? Is a volunteer coordinator required as recruiting, retaining and recognising volunteers are important to your historical society? It could be a curator because improving interpretation of the exhibits is important to attract more visitors to the society museum. One of the things you might have identified is a need for someone whose specific role is to handle marketing and promotion – who would do this?

#### Identify the roles that are critical for making the changes that need to occur in the next 2-5 years.

Refer to the responses in Step 2 where you outlined the changes that need to occur in the next 2-5 years. Here identify the roles that relate to governance and other society activity. Perhaps you want to involve younger people. Consider which position in your historical society is responsible for this. For many historical societies where the membership is aged between 65-80, younger membership

might be anyone under 60. Clarify what you mean by younger people. Is it currently anybody's responsibility or do you need to create a new position that addresses targeted community engagement.

Finally, think about whether there are any roles you have not covered but you think are critical to your historical society's future. These roles might include support staff that can assist with web site maintenance or other digital media outreach that might appeal to a younger age demographic.



### 3. Critical Roles in the Society

Outline the key roles within your society that will serve to address your needs now and into the future.

	<b>Roles for the things you do well now</b>	<b>Roles for what you want to do differently/better</b>	<b>Roles that are critical in contributing to the changes in the next 2-5 years</b>
<b>Governance</b> (Governance e.g. leadership, communication, accountability, and strategic direction)	1. 2. 3.	1. 2. 3.	1. 2. 3.
<b>Society activity</b> (Other society activities eg writing history; collection management; public programs; running museum)	1. 2. 3.	3. 3. 3.	1. 2. 3.