

# BELONGING

CREATING A WELCOMING COMMUNITY FOR EVERYONE



AN INCLUSION TOOLKIT FOR GENEALOGICAL ORGANIZATIONS

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NATIONAL  
GENEALOGICAL  
SOCIETY®



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With special appreciation to the  
NGS Diversity, Equity, and Inclusion Committee  
and thanks to the  
leadership of the NGS Delegate Council



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## Belonging: An Inclusion Toolkit

# Dear Organization Leaders,

At the National Genealogical Society (NGS), we believe that family history belongs to everyone and every story matters. In fact, we've made a commitment to "building a diverse and inclusive community interested in shaping the future of family history through trusted collaboration." We call this our *Commitment to Ethical Purpose*, and it is a guidepost used at every meeting of our Board of Directors.

This toolkit supports your organization as a welcoming place for anyone exploring their family history. You'll find practical resources, aligned with your mission, to ensure everyone feels they belong. There is an increasing amount of news and research about how people are looking for community and belonging, and genealogy organizations have an opportunity to meet that need since everyone has a family history to explore.

Whether you're just getting started or building on efforts to be more welcoming and inclusive, this toolkit includes frameworks, templates, and ideas you can adapt and apply.

Some organizations may wonder if they have the capacity to do this well or worry about navigating sensitive conversations. If that resonates with you, you're not alone—we understand, and this toolkit is designed to reassure and encourage you. There's no single "right way" to build a diverse, inclusive organization. At its heart, this is about being able to help everyone who interacts with your organization while on their genealogy journey. We hope that leads to your growth and long-term success as you serve your mission.

All we ask is that you begin with curiosity, care, and a commitment to keep learning and moving forward.

We're excited to walk this path with you. This toolkit is a living resource that NGS will update based on your feedback and experiences. We would love to hear how your organization uses these tools and what you discover in the process.

**Thank you for all you do and for being part of our community,  
The National Genealogical Society**



# Inclusion Matters in Genealogy and Family History

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## GENEALOGY IS ABOUT PEOPLE. ALL PEOPLE.

Genealogists and family historians are responsible for telling the stories of our family. We search for ancestors, preserve family memories, and uncover truths that bring history to life. There is no greater people-centered pursuit than our work.

As organization leaders, we are responsible for pursuing our missions while growing our organizations. These responsibilities also require us to be people-centered.

Our missions require us to:

- welcome all kinds of families
- acknowledge gaps and biases in records
- make space for different languages, traditions, and perspectives
- be honest about hard histories and who gets left out.

## OUR WORK IS NOT JUST ABOUT THE PAST. IT'S ABOUT THE FUTURE.

Genealogical organizations that embrace inclusive practices are going to be:

- stronger in their missions
- more relevant to younger and more diverse audiences
- better equipped to grow, connect, and lead
- able to reach more people.

Whether you're launching your first initiatives or refining work you've been doing for years, this toolkit is here to support you. You don't need to be perfect to get started or keep going. Every step counts.

Let us work together to make sure the genealogy community reflects the full richness of our shared history and welcomes everyone.

# Principles of Inclusive Language

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## WHAT IS INCLUSIVE LANGUAGE?

Inclusive language reflects respect for all people, regardless of race, ethnicity, gender identity, sexual orientation, ability, age, religion, or family structure.

This doesn't mean we have to speak perfectly all the time. But it does mean we strive to:

- use person-centered language when appropriate
- avoid outdated or offensive terms in current situations
- understand historical context
- stay open to feedback and growth.



## WHY IT MATTERS IN GENEALOGY

Genealogists often encounter outdated or biased language in historical records like censuses, obituaries, and diaries. While it's important to recognize and understand these terms in their original context, we do not need to repeat them without explanation in the stories we share today.

For example:

- "Illegitimate" was once a common term for children whose parents weren't married to each other, but it has a harmful stigma. Consider an alternative like "child born outside of marriage" instead.
- Instead of "slave," use "enslaved person" when talking about a person forced into slavery to center their humanity over legal status.

By using language that affirms and includes, we model the values we want to see in the genealogical community.

# Glossary of Inclusive Terms for Genealogical Organizations

*Use this glossary as a shared vocabulary for reflection, discussion, and growth within your organization.*

**Accessibility:** Ensuring that everyone, including people with disabilities, can access events, resources, websites, and opportunities.

**Belonging:** A feeling of connection, safety, and acceptance. Belonging goes beyond being invited. It means being valued.

**Cultural Respect:** A lifelong commitment to learning about and honoring other cultures and lived experiences, including those within your own community.

**DEI:** Often used together, the letters stand for diversity, equity, and inclusion.

**Diversity:** The presence of differences in identities, backgrounds, perspectives, and experiences, including race, ethnicity, gender, age, disability, religion, language, socioeconomic status, sexual orientation, and more.

**Equity:** Fairness in access, opportunity, and support. Equity acknowledges that not everyone starts from the same place and works to address barriers.

**Genealogical Inclusion:** A commitment to ensuring that genealogical events, tools, and storytelling reflect a wide range of identities, families, and histories, and making programs accessible to people through reasonable accommodation.

**Historically Excluded Communities:** Groups that have been deliberately or systemically excluded from social, political, or historical recognition.

**Implicit Bias:** Unconscious attitudes or stereotypes that affect decisions and interactions. Everyone has biases so it is important to recognize and address them.

## Glossary Continued

**Inclusion:** Creating environments where all people feel welcomed, respected, valued, and empowered to fully participate.

**Inclusive Language:** Language that respects people of all identities and avoids reinforcing bias, erasure, or stigma. It's people-centered, evolving, and intentional.

**Marginalization:** The process by which some groups are pushed to the edges of society or excluded from full participation. Similarly, **marginalized** refers to groups facing systemic oppression or discrimination.

**Microaggression:** Brief, often unintentional, comments or actions that reinforce stereotypes or cause harm.

**Performative Allyship:** Publicly supporting a cause for appearance's sake, without meaningful action. This can harm trust and slow real progress.

**Person-First Language:** Phrases like "person with a disability" rather than "disabled person" are intended to emphasize the person, not the condition. Some communities prefer identity-first language, so always ask.

**Privilege:** Unearned advantages people have based on aspects of their identity. Privilege doesn't mean you haven't worked hard. It means there are some challenges you didn't have to face.

**Underrepresented:** Groups that have historically had limited access to power, visibility, or resources within a given context. This may include racial/ethnic minorities, LGBTQIA+ individuals, people with disabilities, and others. A group being underrepresented is often a result of marginalization.

# Assessing Your Organization

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As organizational leaders, one of your principal duties is to assess or evaluate your organization to support continuous improvement. Before starting to create or increase inclusive practices, it is helpful to assess your organization's current activities.

Internal assessments require reflection, open and inclusive discussions to answer specific questions, assessing program gaps, identifying what success looks like, setting specific goals, and doing difficult internal work before engaging others.

## Important Aspects of an Internal Self-Assessment

1

Understand where your organization is now

2

Ask reflective questions with curiosity

3

Notice where there are gaps

4

Get specific about your goals

5

Look inward before reaching outward

# 1. Understand Where Your Organization is Now

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Every organization has a different starting point. Some organizations are just beginning to consider how inclusive programs help meet their mission. Others have already hosted inclusive events, reviewed bylaws, and diversified their leadership. Some may feel uncertain or hesitant, unsure if they're doing things well or worried about getting something wrong as they get started.

Taking time to pause and analyze where your organization currently stands is one of the most valuable steps you can take as leaders. It gives you a foundation to build on and helps you identify areas where small, intentional changes can have a big impact.

A dialogue amongst the board, key volunteers and members, and staff is a great way to start. Remember, it's okay to feel unsure of yourself during this exercise. What matters most is that you're willing to reflect, listen, and try.



## **An organizational dialog might start by asking these questions:**

- Who feels welcome at our events—and who might not?
- Whose stories and family structures are most often reflected in our programming, marketing, and communications?
- What messages are we sending through our language, leadership, and priorities?
- What have we already done to advance inclusion?
- What's working? What's not?
- Where do we feel stuck, unsure, or uncomfortable?

# 2. Ask Reflective Questions

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Use these questions to guide board discussions or conversations within your organization. You don't have to answer them all at once. Start where you are. (*Organizations that specialize in one particular family surname, ethnic group, etc., may need to think about the best way to apply some of these questions to their situation and mission.*)

### MEMBERSHIP & COMMUNITY



- How diverse is our organization in terms of race, ethnicity, age, ability, and cultural background?
- What are we doing to actively recruit members from underrepresented communities?
- How do we ensure that all members, regardless of background, feel seen, welcomed, and valued?
- Are younger generations represented in our membership? How do we engage them?

### REPRESENTATION & STORYTELLING



- Whose histories are centered in our programming, publications, and research focus?
- How do we ensure that the stories and contributions of diverse populations are included and celebrated?
- How do we talk about complex or difficult histories, such as enslavement, displacement, ethnic or religious exclusions, or colonization? How should we move forward in a way that centers people?

### ACCESSIBILITY & INCLUSION



- Are our events and resources accessible to people with disabilities?
- Do we offer materials in multiple formats (e.g., large print, digital, captions, visual alternatives)?
- How do we welcome non-English speakers or English language learners?

## 2. Reflective Questions Continued

### LEADERSHIP & ORGANIZATIONAL CULTURE



- Does our leadership reflect the diversity we want to see in our community?
- How does our board support DEI efforts, and are they visibly committed?
- Have we identified historical barriers or exclusions within our organization?
- What specific steps are we taking to create a more inclusive organizational culture?

### COLLABORATION & PARTNERSHIPS



- Are we working with organizations led by or serving underrepresented communities?
- Have we built relationships with groups beyond traditional genealogy circles (historical societies, cultural centers or museums, tribal or ethnic organizations, etc.)?
- Do we invite speakers and collaborators with lived experience and diverse perspectives?

### ACCOUNTABILITY & GROWTH



- How do we measure progress toward our goals?
- What tools or feedback systems do we use to check in with our members about inclusion?
- What happens when someone is made to feel excluded or unwelcome — and how do we respond?
- What goals have we set for the future of our DEI work?

# 3. Conduct a Gap Analysis

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For genealogy organizations, inclusion means more than saying you welcome a wide range of members, volunteers, or leaders—it means ensuring that everyone feels respected, heard, and able to participate fully in learning, researching, writing, and using technology. In other words, representation alone does not guarantee inclusion.

A gap analysis will help identify where an organization's values and intentions may not fully match people's experiences. Gap analyses look at how policies, practices, and culture affect participation, belonging, and opportunity. Because inclusion is experienced personally, it is best understood by listening carefully—through qualitative surveys, discussions, feedback, and observation—rather than solely relying on numbers. The numerical data is helpful, but it is more valuable when paired with additional context.



### Key metrics include:

- measures of satisfaction (quantitative and qualitative)
- levels of engagement and member recruitment/retention
- qualitative surveys of past members
- leadership and staff demographics (NGS uses measurements from Candid.org and posts results to Candid annually)
- membership demographics

By examining patterns, listening to stories, and reflecting on outcomes such as participation and retention, organizations can identify improvement priorities. Over time, this thoughtful approach helps build a more welcoming, inclusive community that strengthens both our mission and our membership or participation.

**You don't need expensive consultants or complex tools to do a self-assessment within your organization. Begin by closely examining your current practices, materials, and culture. Ask honest questions. Take notes. Use what you discover to then set clear, informed goals for your next steps.**

## 4. Set Goals

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Clear goals turn your intentions and vision for success into meaningful progress. After reflecting on your organization's culture and practices, it's time to define clear goals for your organization and your community.

Keep things simple. Do not set a dozen goals. Start with one or two priorities that feel both meaningful and achievable. Then build from there. Goal-setting prompts might include:

- What change would most improve the sense of belonging in our organization?
- What's something we've talked about doing but haven't acted on yet?
- What's a quick win that could build momentum?

### SMART GOALS

What makes a goal effective? Good goals are:

- **Specific:** Focused on one clear area of impact
- **Measurable:** Includes a way to track progress or completion
- **Actionable:** You know who is doing what by when
- **Relevant:** Tied to your mission and values
- **Time-bound:** Can be reviewed within a set period



**Example of a SMART goal:** "Increase the number of speakers from underrepresented communities at our events to be 25% of the total speakers over the next year."

**Be SMART.** Start small. Stay flexible. Choose goals that align with your organization's size, resources, and readiness. Some examples include, but are not limited to:

- **Leadership:** Establish a workgroup focused on building an inclusive culture
- **Programs:** Host events each year that focus on underrepresented histories
- **Outreach:** Partner with a local cultural organization on a workshop or speaker event
- **Membership or Patronage:** Revise your website and marketing materials to better reflect inclusive values
- **Accessibility:** Offer sign language interpreters or captioning at your flagship events

## 5. Reach Out After Looking Inward

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If your members or patrons do not reflect the diversity of your community, it's not just about who hasn't found you yet. It's also about how you show up, what you offer, and whether people feel they are welcome and belong once they arrive. After completing your internal self-assessment, it's time to expand your outreach and build partnerships.

The good news? Small, intentional shifts in how you engage can make a big difference.

Review the findings from your internal assessment and begin addressing questions:

- Who currently joins or participates in our organization and who doesn't?
- Do our communications and materials reflect a wide range of families and stories?
- Are we reaching people outside our usual circles or networks?
- Have we built relationships with the communities we want to invite in?

**Outreach is ongoing. It is a process of developing relationships and trust over time.**



### Strategies for Expanding Outreach

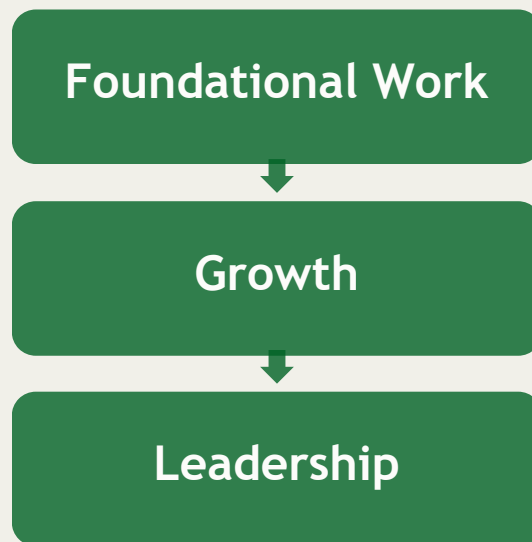
- Partner with local organizations serving underrepresented communities. This could be historical societies, community centers, libraries, cultural festivals, faith-based groups, or others.
- Audit your public-facing materials. Update photos, stories, and examples to reflect an inclusive set of family histories and update your communications policies.
- Participate in events with diverse audiences, such as cultural festivals, Pride month activities, Juneteenth celebrations, and more.
- Offer low-barrier entry points like free workshops, drop-in Q&As, or "bring a friend" events.
- Highlight inclusive programs in your newsletters, social media, and email marketing.
- Share stories from a wide range of backgrounds in your publications and at events.

# Tools and Ideas for Inclusion and Belonging

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Building an inclusive organization follows a pattern, much like steps along a pathway. From your starting point, your organization will move through three phases:

1. **Foundational work** (learning, assessing, and planning)
2. **Growth** (implementing new programs and building a culture of inclusion)
3. **Leadership** (modeling your practices and sharing your experiences)



As you begin your work or look to the next step along the path, know that you have support available. There are tools and tips that can make your journey easier. We have curated a few ideas here for you to use. Many more can be found online if you need additional resources, especially for a specific topic or situation. Look for guides, podcasts, and other items from trusted organizations and experts.

Share information and tools with leaders and volunteers in your organization so that everyone works together to learn and achieve your goals.

# A. Align Inclusion with Your Mission

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Every genealogical organization has a mission. Often, it includes phrases such as “preserve family history,” “educate the public,” “promote research,” or “build community.” When you align inclusion with your mission, it becomes easier to prioritize, fund, and sustain your efforts. You’re fulfilling your purpose more fully. After all, inclusion is not really an add-on to the mission. It’s part of why we exist as we help everyone research their family history.

## How Inclusive Principles Strengthen Mission Work

When organizations adopt values, principles, and practices that are inclusive, accessible, and diverse they

- bring more stories into focus for more people
- ensure more people can participate
- build stronger community ties and trust
- open the door to more researchers and members
- broaden what “family history” really means

## Sample Inclusive Language for Mission Statements

- To inspire and support the exploration of all family histories, with a commitment to inclusive research and community engagement.
- To preserve and share the genealogies and histories of our region, honoring the diverse voices and experiences that shaped it.
- To create a welcoming space for researchers of all backgrounds, and to uplift the stories that have historically been overlooked.

Feel free to copy, adapt, and make these samples your own.

## B. Sample Inclusive Statements for Your Website, Newsletter, or Events

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- We believe that every family has a story worth preserving and every person deserves to feel welcome in the search.
- We're committed to building an inclusive, respectful, and equitable community. We recognize that genealogy has not always been accessible to everyone, and we are actively working to ensure that our programs, leadership, and resources reflect the rich diversity of the families and histories we serve.
- We are dedicated to providing a welcoming and inclusive environment at all of our events. All attendees, speakers, and volunteers are expected to treat one another with respect. Discrimination, harassment, or exclusionary behavior based on race, ethnicity, national origin, gender, gender identity or expression, sexual orientation, age, disability, religion, or family structure will not be tolerated.
- This event is open to all. We welcome researchers of all backgrounds, experience levels, and family histories.
- Accessibility Note: If you require accommodations to participate (such as live captioning or ASL interpretation), please contact us at [email address].
- As board members of [Your Organization Name], we affirm our shared responsibility to create a culture of inclusion, equity, and accountability. We commit to learning about diversity and systemic barriers within genealogy, listening to members and partners from underrepresented communities, and supporting policies and practices that reflect our values.
- [Organization Name] does not discriminate on the basis of race, ethnicity, national origin, gender, gender identity or expression, sexual orientation, age, disability, religion, or family structure. We are committed to cultivating an inclusive and respectful environment in our leadership, membership, events, and publications.

# C. Inclusive Programming

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Programs are one of the most visible ways to show your values.

Inclusive programming helps more people see themselves in genealogy. It enriches the conversation. It broadens our understanding of history, and it builds trust with new and returning members or patrons alike.\*

### Questions to Consider When Planning an Event

- Whose stories are we highlighting?
- Whose voices are missing and how can we invite them in?
- Are our topics relevant to a diverse range of family experiences?
- Would someone from an underrepresented community feel welcome at this event?

**When inviting speakers, let them know that your organization values diversity and inclusion. It sets the tone for a respectful, open conversation and may make them more likely to say yes.**

### Strategies for Inclusive Programming

- Feature underrepresented histories (Black, Indigenous, immigrant, LGBTQIA+, disabled, working-class families, etc.).
- Use inclusive titles and descriptions (e.g., “Family History in All Its Forms”).
- Collaborate with cultural or other relevant types of organizations to co-host or sponsor events.
- Offer a range of formats to meet different needs, including lectures, panels, workshops, community storytelling, etc.
- Ensure accessibility with captioning, interpretation, or visual supports.
- Ask for feedback after events, and include questions about inclusion and belonging.

*\*The scope of your organization—whether state, regional, municipal, ethnic, topical, etc.—will factor into the range of questions and inclusive programming you may need to consider.*

## D. Speakers and Community Experts

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Bringing in speakers with diverse backgrounds, experiences, and perspectives can transform your programming. It builds trust, sparks conversation, and shows that your organization values inclusion in action.

### What to Consider for a Speaker

- Lived experience in underrepresented communities
- Specialized knowledge of inclusive or community-specific research
- Experience navigating identity in genealogical work
- Passionate storytelling and connection to history

**New voices bring new energy and new stories.**

### Where to Potentially Find Speakers

- Local universities or community colleges (ethnic studies, history, anthropology)
- Cultural centers and museums
- Community historians or elder knowledge-keepers
- Genealogy YouTubers, podcasters, or bloggers with lived experience
- Association of Professional Genealogists, Genealogical Speakers Guild, NGS, and other genealogical organizations
- Organizations serving LGBTQIA+, immigrant, or disability communities

### How to Approach

- Be specific and respectful: “We’d love to highlight the history of \_\_\_ and would be honored if you’d join us.”
- Offer an honorarium when possible
- Share who your audience is, what format you’re imagining, and how you’ll support access (captions, tech support, etc.)

## E. Sample Scenario: Inclusive Programming that Works

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**Organization:** Golden Valley Genealogical Society (GVGS)\*

*\*Fictionalized but based on real strategies*

### Goal

Reach new audiences and represent local diversity in a meaningful way.

### Idea: "Roots Across Cultures" Community Panel

GVGS hosted a free public panel featuring local community members from different backgrounds (Filipino, Black, Iranian, and Mexican American) who shared how they research family history and preserve culture.

### What They Did

- Partnered with the community cultural center.
- Offered bilingual flyers and social media posts.
- Had a volunteer interpreter for Spanish-speaking attendees.
- Invited a local youth dance group to open the event.
- Provided refreshments from community-owned bakeries.

### Outcome

- Attendance was double their average.
- 22 new newsletter signups.
- One new board member was recruited from a panelist's organization.
- The event sparked a new quarterly series on "Genealogy Around the World."

### Takeaway

You don't have to be big to be bold. A small idea can have a meaningful impact. Inclusion starts with a genuine welcome and a willingness to learn.

## F. Accessibility in Practice

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Inclusion isn't complete without access. Every organization should strive for accessibility so that everyone, regardless of disability, language, or other barriers, can participate in your events, resources, and community.

### **Accessibility includes (but isn't limited to):**

- Physical access to venues (ramps, restrooms, seating)
- Visual access (large print, screen reader compatibility, image descriptions)
- Auditory access (captioning, sign language interpretation, quiet spaces)
- Cognitive access (clear language, flexible formats, visual aids)
- Financial access (free or low-cost options, scholarships)

**Don't assume, ask. Invite people to share what they need to feel comfortable and included. Accessibility improves when we build relationships, not just policies.**

### **Simple Steps to Consider to Improve Access**

- Ask about access needs in event RSVPs.
- Provide real-time captions or transcripts for webinars.
- Choose venues with ramps, elevators, and accessible bathrooms.
- Use plain language and avoid jargon in your presentations and handouts.
- Include alt text for all images on your website and social media.
- Record and share events for people who can't attend live.
- Offer a quiet room or sensory-friendly break space during longer in-person events.
- Make sure your Zoom backgrounds, fonts, and colors meet contrast standards.

## G. Partnering for Impact

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### Why Partnership is Important

- Build trust with new communities
- Share resources, venues, and speakers
- Learn from lived experience
- Expand your reach and deepen your programs
- Collaborate on inclusive events that help reflect your community

**Partnerships are about listening and building relationships, not extracting stories.**

### Who to Consider for Partnerships

- Museums, historical societies, and cultural heritage organizations
- Community archives or libraries
- LGBTQIA+ centers
- Disability advocacy groups
- Churches, mosques, or temples with diverse congregations

### Outreach Tips

- Lead with shared values (“We’d love to collaborate on preserving community history.”)
- Start small by co-hosting an event, sharing a speaker, or supporting each other’s work
- Show up before you ask. Attend their events and follow their work

### Ideas for Collaboration

- Joint speaker series
- Oral history projects
- Genealogy 101 workshops at community or senior centers
- Cross-promotion in newsletters
- Youth or intergenerational programming

## H. Coffee and Conversation Meetups

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Sometimes, the best things can start over coffee. Hosting informal meetups helps build relationships, spark new ideas, and reach people who might not go to a lecture but will show up for a good conversation.

Casual in-person gatherings are an excellent way to begin bringing together genealogical organizations and community groups (including societies, libraries, cultural organizations, archives, museums, schools, etc.).

### What It Can Do

- Break down barriers
- Build trust
- Create space for partnerships
- Surface ideas for inclusive programming
- Identify shared challenges and opportunities

### Planning Made Easy

- Pick a location: library meeting room, coffee shop, historical society, or local park.
- Invite 3–5 groups: start with those you already know. Reach out to one group you've never worked with before.
- Keep it light: no slide decks, no pressure. Just a chance to connect and listen.

### Conversation Starters

- What family history projects are you working on right now?
- How do you engage your community?
- Where do our missions overlap?
- What kinds of stories do you want to tell?

# I. Avoiding “One and Done”

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It's easy to host one inclusive event, revise a policy, or share a social media post—and then move on. But lasting impact comes from consistent, ongoing action. Belonging is not a box to check. It's a culture to build and maintain in your organization.

### Common Pitfalls

- Only doing DEI work during heritage months celebrations
- Relying on one person or committee to carry the load
- Avoiding feedback out of fear of discomfort
- Celebrating a small win and stopping there instead of building on momentum

### How to Stay in Motion

- **Consider and collaborate.** Look for ways to integrate inclusion across the organization. Also, plan for outreach, ongoing communication, and follow-up with people or groups you would like to see actively engaged with or in your organization.
- **Embed inclusion in your calendar.** Add checkpoints to annual planning meetings, program reviews, and board agendas.
- **Share progress.** Update your members or patrons on what's changed and what's next. Transparency builds trust.
- **Keep learning.** Host “lunch and learn” sessions, invite guest speakers, or assign a shared reading.
- **Don't wait for perfect.** It's better to keep going imperfectly than to pause until you “have it all figured out.”
- **Pass the baton.** Include training during your leadership transitions so the work doesn't disappear with one champion.

**Success requires building a culture of inclusion. Your work should be continuous.**

### Try This

Before you wrap up any initiative, ask, “What's the next step we should take?”

# J. Progress Tracking and Evaluation

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Tracking your progress doesn't have to be complicated. It's about paying attention to what's working, what's changing, and where you need to adjust.

## Why Track?

- Stay accountable to your SMART goals and show the impact
- Celebrate wins, even small ones
- Learn what needs more attention

## Easy Tracking Tools

- Yearly self-assessment
- Post-event surveys with inclusion questions
- A simple spreadsheet to log changes and ideas
- Feedback box (digital or physical) for anonymous suggestions

**What gets measured gets better.**

## Programs & Events

- How many were designed with inclusion and diversity in mind?
- Who attended and who didn't?
- What feedback did you receive?

## Participants & Leadership

- Has the makeup of your leadership, membership, and patrons changed over time?
- Are you hearing new voices in meetings, events, or planning?

## Policies & Practices

- What has been updated and what still needs review?

## Community Engagement

- Have you formed new partnerships?
- Are more community members interacting with your work?

## K. Self-Reflection and Surveys

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Surveys and self-reflection tools help you understand how people experience your organization and where you can grow. Use these questions in post-event forms, annual check-ins, or private reflection. You can use things like this to track any changes over time.

### Individual Self-Reflection Prompts

- How comfortable am I discussing race, identity, and inclusion?
- How often do I see people who look like me in genealogical spaces?
- When was the last time I reconsidered how I use a term or label in my research?
- How has my own family story shaped how I see others' histories?

### Member and Participant Experience Surveys

Use these statements with an option to agree or disagree in anonymous surveys, evaluations, or group discussions.

#### **Belonging & Representation**

- I feel welcomed and respected in this organization.
- I see a range of family types and cultural histories reflected in programming.
- Our organization highlights a wide range of lived experiences.

#### **Access & Inclusion**

- Events and resources are physically and digitally accessible.
- Accommodations are clearly communicated and easy to request.
- I feel comfortable giving feedback if I notice exclusion or bias.

#### **Culture & Leadership**

- Our leadership reflects the diversity of our community.
- Inclusion and equity are part of our mission and planning.
- I trust that this organization is working toward a more inclusive future.

### Try This

Include a comment box with one open-ended question: “What’s one thing we could do to make this organization more welcoming?”

# L. Recognize and Celebrate Progress

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Celebrating success keeps people motivated. It builds community, reinforces values, and shows that change is happening.

## Ways to Celebrate Milestones

- Highlight a member doing inclusive work in your newsletter
- Share your organization's success at events, not just in boardrooms
- Feature partner organizations on your social media
- Make time at a meeting or event to acknowledge new collaborations, updated policies, or brave conversations
- Send a personal thank-you to a speaker, facilitator, or member who made a difference

**Progress deserves applause, even the quiet kind.**

## Expand Your Recognition Programs

Options for new awards could include:

- Community Connector Award
- Inclusion Innovator Award and/or Inclusive Programming Award
- Community Partnership Award
- Emerging Leader Award
- Member Spotlight for Inclusive Research

Create simple nomination forms, inclusive review processes, and honor recipients at events, in a newsletter, and on social media.

## Try This

As each initiative ends, ask, "Who helped make this happen and how can we thank them?"

## M. Funding and Support

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Meaningful work deserves meaningful support. Whether you're launching a new initiative, inviting a guest speaker, or partnering with another organization, there are ways to find funding and share the load.

### Simple Ideas to Fund Your Efforts

- Add a small line item to your annual budget for specific inclusion efforts
- Apply for local or regional community grants
- Ask a board member or leader in your community to sponsor a specific initiative (e.g. youth scholarships or accessibility services) or connect you with a sponsor
- Add an option for donations to registrations or other items asking people to consider supporting efforts for ensuring more people feel welcome and included
- Seek in-kind support from partners: venues, interpreters, food, printing, etc.

**You don't have to do this alone or on your own dime.**

### Get Creative with Support

- Ask for volunteers with lived experience to review programs or outreach
- Collaborate with universities or student groups looking for service opportunities
- Apply for speaker stipends from statewide genealogy or humanities councils
- Share the costs of inclusive programming with a partner organization
- Pool resources with nearby societies for shared accessibility tools or training

### Try This

When applying for a grant or community partnership, include a note about how your organization is working to increase inclusion and access. There are funders who want to support values in action.

# N. Sample Scenario: A Transformation Story

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## Organization: Silver County Genealogical Society (SCGS)\*

*\*Fictionalized for illustration — inspired by real stories*

### Starting Point

SCGS had a passionate but aging membership, mostly drawn from one demographic. Events were traditional and attendance was declining. The board had not discussed inclusion and diversity as a growth strategy.

A new board member raised the idea of holding a program on researching African American families in their county. It sparked conversation, and some hesitation, but they gave it a try. They then decided to grow their efforts.

### What They Did Over Two Years

- Hosted three inclusive guest lectures
- Partnered with Historically Black Colleges and Universities, known as HBCUs, in the region to co-create a Black genealogy workshop
- Updated their bylaws to use more inclusive language where appropriate
- Began offering scholarships for young researchers
- Added closed captions and large-print handouts at all events
- Created a subcommittee for inclusion and added a community liaison to the board

### Results

- Membership grew, including more young adults and people of color
- Newsletter readership increased
- An inclusive event series was recognized by their state humanities council
- New relationships led to fresh programming ideas and more shared resources

### Takeaway

Transformation doesn't happen overnight. But it does happen one conversation, one program, and one commitment at a time.

# O. 30 Days of Action

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As you begin your journey towards inclusion, here is how to keep moving, whether your organization is starting fresh or continuing efforts. Choose a track that fits your organization, its current energy, and the capacity of the people involved. These simple steps can be achieved in 30 days.

### Just Getting Started

- Read your current mission statement and ask if it reflects inclusion and belonging
- Share one of the reflection questions with your board or team
- Choose one program topic that centers on an underrepresented history
- Post your first event invitation with inclusive language

**No pressure. Just momentum.**

### Building on Momentum

- Ensure inclusion and diversity are a standing part of your board agendas
- Reach out to a new community group for a potential partnership
- Review and update your speaker recruitment list
- Host a Coffee and Conversation meetup with other organizations

### Ready to Go Deeper

- Launch a short member survey
- Plan a Table Talk series
- Create or update inclusive language for your website
- Write a progress update and incorporate it into an annual report

### Try This

Pick one item from the lists above and add it to this month's plan. That's how change starts.

# NGS's Commitment to You

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**We're building the future of genealogy together.**

The work of cultivating inclusion and belonging is ongoing. It's layered. It's sometimes uncomfortable. But it's also hopeful, powerful, and deeply aligned with why we do genealogy in the first place:

- to uncover truthful information,
- to honor every story, and
- to build a connection across time and space.

This toolkit is not the end of the conversation; it's a beginning, or a next chapter. Your efforts matter, no matter how small they may seem. When one organization becomes more inclusive, more people feel they belong, and our entire community becomes stronger.

**The National Genealogical Society is committed to supporting inclusive practices in every part of family history work. Through our leadership, staff, committees, programming, partnerships, and this toolkit, we are here to walk alongside you as you take action, reflect, and grow. We welcome your feedback and your success. *Together, let's make family history more inclusive and create a community where everyone can experience belonging.***

This toolkit is a living document. This is the first version. We are excited to update it down the road with your stories and ideas as we all learn and grow.

Have a success story to share? Want to offer feedback on this guide? Email us at [inclusion@ngsgenealogy.org](mailto:inclusion@ngsgenealogy.org).





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