

Guild-hosted web sites and preservation of registered study web sites - revised proposal

The objectives of the Guild are:

- a) To advance the education of the public in one-name studies, this being defined for purpose of this Constitution as research into the genealogy and family history of all persons with the same surname and its variants.
- b) To promote the preservation and publication of the resultant data, and to maximize its accessibility to interested members of the public.

The Guild Vision

The Guild will strengthen its position as the centre of excellence for surname studies by educating the worldwide genealogical community in one-name studies and empowering members to share their knowledge and expertise.

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The proposal

1. The Guild should set up a service for hosting one-name study web sites of members that relate to their registered surname(s). A major purpose of the service is to enable the one-name web site of each participating member to continue indefinitely as a live web site after the member has died or ceased to be a member of the Guild. The proposed service would also allow participants, while they remain members of the Guild, to maintain and edit their web sites as if they were on a commercial hosting facility. (See Appendix 1, Note 1.)
2. The implementation of this proposal would be specifically aimed at a key objective of the Guild: the “preservation and publication of the resultant [one-name research] data, and to maximise its accessibility to interested members of the public.” It would also fulfil the *Guild Vision* that the Guild should “strengthen its position as the centre of excellence for surname studies.” It is also expected to encourage new members to join the Guild and current members to make effective use of current technology.
3. The proposed service would support each member who joins it in creating a one-name study web site or continuing to develop an existing web site while they are in membership of the Guild. (See Appendix 1, 2.)
4. If, after the member ceases membership of the Guild, another Guild member wishes to take over the registration of the surname and develop the one-name study and web site, they may join the scheme. The Guild will supply a copy of the web site of the departed member as the basis of a new web site for that surname, but the Guild would also retain the “legacy” site as left by the original owner as a live web site. (See Appendix 1, Note 3.)
5. Guild Members submitting this proposal are volunteering to lead the implementation of the proposed service. Volunteers are available to take the lead in conducting trial, setting up and managing the proposed scheme and supporting participants, in collaboration with the Web team, other Guild office-bearers and members. (See Appendix 1, Note 4.)
6. In addition we propose the development of an enhanced website offering that would use TNG (The Next Generation) software. This could coordinate all sites that use it into a master database that could be used for multiple research purposes without affecting the individual sites in any way. Volunteers are willing to develop and manage this enhancement. (See Appendix 1, Note 5.)

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Management Summary

The Guild has a history of providing its members with a means to archive their one-name studies, from its archived paper-based studies to the Members' On-line Archive and the Guild Online Library. These are valuable services as far as they go. However today the dynamics have changed. Not only are more studies now published on a web site of some sort, but members want to be assured that their research continues to be available on-line after their deaths, even if no successor has stepped forward to continue the surname registration. A concern exists that no suitable scheme exists to retain deceased members' web sites as live sites.

Further, it is recognised in the *Guild Vision* that the Guild should “strengthen its position as the centre of excellence for surname studies.” Thus its web site should include “centre of excellence” content that will drive the public to the web site to learn more about the Guild.

This proposal is based on a belief that both challenges can be met by creating a service under Guild auspices to allow members, while living, to host their one-name study web sites on Guild server space. After their death, when no immediate successor to the study is named, the sites would continue to be maintained by the Guild as live archived web sites, and a later successor would be given a copy of the site for their continuing research.

This cost of this service to the Guild would be minimal and volunteers are available to manage the service under the general direction of the Web Manager.

In our researching for this proposal, we identified three distinct classes of supportable web site:

1. Basic web sites: These are sites where the content consists of static pages created using HTML, CSS and Javascript. They can contain media and files, both displayed and available for download.
2. CMS web sites created using Content Management Systems. These sites require software such as WordPress or MediaWiki that dynamically creates the pages being displayed. In general, they are easy to use. They can include blogs and other interactive features.
3. Enhanced web sites: These consist of dynamic web pages created by an on-line database. The data is uploaded to the database as a Gedcom file with any associated media and files using software such as TNG (The Next Generation). The software displays the study data by generating pages from the database.

All three classes of site have common issues with respect to server space, access provisions, copyright, succession planning, etc. and each has unique issues. Many current members will be interested in moving their existing sites to Guild servers to take advantage of the long term retention; more members will consider using a web site knowing that its contents will be preserved; many non-members will be encouraged to join the Guild to take advantage of this service which is not currently offered elsewhere. (See Note 5.)

Alternatives such as those offered by RootsWeb, FamilySearch, Tribal Pages and other suppliers have also been considered but fall short of meeting the objectives of this proposed scheme. (See Note 5: “Other types...”)

Entry to the proposed service would be the subject of a formal agreement between each participant and the Guild. Each member's site would continue to be accessible to public viewing in perpetuity as long as the Guild exists. The cost of the proposed service would be low and would be outweighed by the benefits, including the financial benefit of the increased membership that the service is expected to attract. There would be a licensing charge payable by the participants for use of software for the “enhanced” type of web site. (See Appendix 1, Note 2.)

Appendix 1 - Proposal Details

Note 1: Aims of the proposed service

The driving logic for this proposal is that many Guild members are embracing the philosophy behind the phrase “the paperless office” by digitising more and more of their data and making more of it available on their web sites. This idea is encapsulated in the phrase *The web site is the one-name study* - also the title of a [draft] Journal article (<http://www.cree.name/home/website.htm>).

When we consider to whom we might entrust the indefinite preservation of our one-name study web sites after our deaths, the Guild of One-name Studies is the front runner by a long way. We have great faith in the Guild as being more likely to preserve our one-name study web sites than any commercial organisation, family member, family trust or whatever. Since the Guild has the legal status of an Educational Charity it would be almost impossible for its objectives to be changed. Once this proposed service is agreed by the Guild and in operation, any member participating in it would be reasonably assured that it will ensure the survival of their web site indefinitely.

Note 2: Operation of the proposed service

The service as proposed would allow for Guild volunteers/mentors to help members who do not have a web site but wish to have one. There could be a progression from a Guild Profile page, through a web site with an easy-to-use interface such as MediaWiki or WordPress, to an enhanced web site.

A deliverable of this project would be the creation of a web-site-specific support infrastructure, including email list, wiki pages, etc. All of this would be accessible through the home page of the proposed service.

A formal agreement between each participant and the Guild would specify *inter alia* that, on the member’s death or discontinuation of Guild membership, or on their agreement to changing their site to “retired” status, the ownership of the site and the member’s intellectual property rights (copyright) to its content would pass to the Guild. The agreement would make the member responsible for abiding by privacy and data protection laws and the for excluding inappropriate or illegal material from their web site.

We do *not* propose that a domain name be provided with each user space. There would be one domain for the whole service, such as **one-name.net** (which is already registered to the Guild but unused), with sub-domains for each user; or it could be addressed under the main Guild domain **one-name.org**. For example the Cree One-Name Study might be addressed at **<http://cree.one-name.net>**.

A participant would be free to register (and pay for) a domain and point it to their sub-domain in the scheme while they are Guild members. The Guild cannot however take on the indefinite renewal of their domain when they die or cease membership of the Guild.

Note 3: Succession membership

Paragraph 4 of the Proposal is designed to safeguard against a new participant deleting or substantially altering an existing "legacy" web site. It could mean that there are two sites on-line simultaneously relating to the same surname. But this does not breach the Guild's "one name - one registration" rule since the legacy site would no longer relate to a current registration. Sites would be labelled according to their status as “active” or “legacy” sites and could either have slightly different subdomain names, e.g. **<http://cree.one-name.net>** and **<http://cree2.one-name.net>**.

Members may pass their sites along with the relevant surname registration to other members. They may also “retire” their web sites to “legacy” status without resigning their membership.

Note 4: Volunteers

Proposers of similar schemes for HTML sites, CMS (Content Management System) site and TNG sites have worked together to produce this revised proposal. Volunteers are available to manage all three types (Mike Spathaky, Chris Gray, Jim Benedict and John Lisle).

These volunteers will manage the initial phase of this project, developing the infrastructure of the web site domain that will hold the member web sites and, along with the Guild Web manager, developing the infrastructure linking the web sites to the main Guild web site, including the method for a members to join the proposed service. They will develop the support infrastructure to support Guild members using this service or interested in using the service and the actual transfer of members’ existing web sites to this service.

This proposal is a team effort and many members need to be acknowledged for their thoughts and input. All of us care about the Guild and want to see it thrive and to support members going forward in this Internet technology age.

In particular, this proposal has been moulded by the thoughts of: Jim Benedict, Doug Burgum, Marie Byatt, Corrinne Curtis, Paul Featherstone, Christopher Gray, Barbara Griffiths, Debbie Kennett, Tessa Keough, Elizabeth Kipp, John Lisle, Scott Shenton, Mike Spathaky.

Note 5: Types of web site

HTML web sites: These are sites where the content consists of pages authored using the languages of the web - HTML, CSS and Javascript*. They could be “hand-crafted HTML pages” or they could consist of HTML, CSS and Javascript code created by genealogy programs, such as Second Site, Legacy, and others. These pages could contain media (sound and video files) and other files (spreadsheets, Gedcoms and PDF files) either displayed or available for download. Such sites are common among existing members. The proposed service would provide for their transfer to a Guild web site so that they will be preserved after those members die or cease membership. (*Hypertext Markup Language is the computer language used for creating web sites, along with Javascript and Cascading Style Sheets)

CMS sites: These are sites which members have created using one of the many free Content Management Systems, such as WordPress or MediaWiki. These sites require software that dynamically creates the pages being displayed. In general, they are easier to use to create content. They could include personal blogs which many members have to further their studies. CMS sites are a growth area. Managing those sites after a member dies or ceases membership does not present problems as they can be handled more or less like HTML sites. Volunteers will at present support CMS sites using WordPress or MediaWiki.

TNG web sites: These are web sites that are created by uploading a Gedcom file and any associated media and other files using TNG (The Next Generation) application that displays the study data as dynamically generated web pages.

It seems likely that significant value will come to the Guild from promoting TNG sites to Guild members. Full details are given in Appendix 2.

Hybrid web sites: We expect that many members’ web sites will be hybrid sites including elements of two or all three of these classes of site; e.g. TNG sites with an associated WordPress blog.

Other types of web site: It has been pointed out that commercial providers such as RootsWeb, FamilySearch, offer free services enabling anyone to upload a Gedcom in order to publish a tree; the provider takes ownership of the data. However, those services do not allow upload of anything except a Gedcom. As the sites are not within Guild space, they are not adding content to the Guild. The only value the Guild can add to those sites might be to preserve their ID and password in a Guild "Password Vault" for a successor to access to copy the content for their successor study. The Gedcom files could be archived with the Guild based on currently available services.

Some members use services like Tribal Pages for their genealogies. It is unclear what will happen to those sites after a members passes away. We see no way that the Guild can preserve those sites.

Some members use Ancestry trees. Ancestry retains trees after a member's subscription to Ancestry expires. However, it is possible for another member with proper sign-in credentials and an Ancestry account to access the site to archive the genealogy and media. The Guild could document this procedure and archive it in the "Password Vault" so that a member's site could be passed on to a successor.

Members should always be aware that a site hosted with a commercial hosting company is at risk if the company folds. If the Guild's hosting company were to fold, the sites would be transferred to another hosting company and all web sites hosted, both "live" and "legacy" sites, would survive.

Note 6 : Options for financing the proposed service

The goal of the proposed service is to be self-funding for active sites. The Guild will wish to consider various options for charging participants. We suggest that the charge be a combination of an entry fee and a recurrent annual fee payable while the participant is in membership. It has been suggested that the entry fee be set sufficiently high to guard against people joining for a short period just to gain perpetuity for their web sites.

Details of funding might be based on the negotiated cost with a hosting company such that the service can grow as needed by the membership. The service costs should be somewhat less than members would be paying on a commercial site. The Guild could buy hosting services and TNG licences at wholesale prices and sell them at or slightly below retail. A surplus here could be used to build up an interest-bearing account under the direction of the Guild Treasurer in order to fund the costs of "legacy" sites. The Guild currently provides archiving of one-name studies on physical media such as CDs/DVDs and paper files at no charge to members. The benefits of attracting "centre of excellence" material to its site would be a factor in the consideration of charges.

Additional payments of a one-off licensing fee and update fees would be payable by each member using TNG software. The deal struck between the supplier of TNG and Alberta FHS provides a discount which accrues to the Society and discussions with the author of TNG have suggested that the Guild would receive the same discount and would not be charged for the updates in relation to "legacy" sites.

Appendix 2 - The Next Generation (TNG)

I. The Next Generation (TNG)

The Next Generation (<http://lythgoes.net/genealogy/software.php>) is both a fully-featured web-based genealogy application, similar in function and capabilities to desktop applications like Family Tree Maker and Legacy, and a state of the art tool for publishing a genealogy on-line. TNG has been on the market for about 12 years and has over 15,000 licences sold. Many Guild members currently use TNG. It is the only product of its kind that has significant penetration among current Guild members.

It is strongly believed that giving prospective members the ability to host and retain a TNG based study on a Guild server would attract many new members to the Guild.

TNG is a low-cost commercial product with a strong support network in place. Although TNG is a commercial product, it is shipped with the complete source code. So the risk to members should the developer discontinue support is minimal. Many Guild members have the skills required both to support members' sites within the Guild network and to maintain TNG long term, should it ever be necessary, as it was developed using well-known technologies.

It seems likely that significant value will come to the Guild from promoting TNG sites to Guild members. Recent surveys show that many Guild members use this application, and the numbers are increasing steadily.

As an Internet tool, it also includes controls on user login, security, privacy and customised appearance. Users of TNG have a broad range of security and privacy settings, from wide open viewing down to total blockage. Guild web sites are expected to be mostly open to both members and visitors to achieve the objectives discussed at the outset. The Guild will be expected to guide members in responsible access settings.

No practical limits exist within TNG (or its underlying MySQL database) on the number of surnames, individuals, or families that can be managed. Any database and total file size limitations will depend on the contract with the web host provider.

We expect that, on the Guild servers, TNG will be mostly used as a web publisher with the members' master files being on a desktop system. The member will periodically upload a Gedcom file and new media files from their desktop to TNG to update their published study. Once a member's Gedcom file is loaded into their sub-domain, the main database can include the key data in a master index file. Key information would be an individual's surname, given name(s), birth/marriage/death dates and locations and maiden names for females.

The web service provider should be expected to include daily backups of the databases.

II. Extended Web Site TNG

Guild member Jim Benedict has developed a tool to make TNG easier to use and maintain. This tool is currently being used to publish and to archive the genealogies of members of the Alberta Family History Society (AFHS). He currently supports about twenty of those members and is willing to share this tool with the Guild and act as the support person for Guild members who choose this TNG users.

A member who is registered with the proposed service will have one instance of the TNG application created and configured as an empty template, ready to receive an uploaded GEDCOM from their home computer files. All of the members using this tool will be using a single MySQL database.

Once some TNG sites are established with a common database, exciting possibilities can be envisaged, such

as a Master Person Index. This may be the most compelling reason for the Guild to go ahead with this project.

Even for one surname study, this is of value. But as more surname studies are added to the site, the Master Person Index takes on the power of cross-indexing all the individuals in all the members' data tables. As more and more members use this service, the system will help identify surname research that is available in another member's family tree.

Collaboration over surname studies, sources and connections will now be very possible. This is truly one of the keystones of the Guild - assisting others with their one-name studies. As for the Master Person Index, the Guild will have the opportunity to match TNG records to its recently established World-wide marriage index, alerting members to possible matches.

Other future enhancements are being planned for the AFHS site that would also be available to the Guild. The AFHS web site is intended to be a master database repository for research in southern Alberta, and will eventually be able to cross-reference:

- Cemetery records and images
- Obituaries
- Birth, marriage and death indexes
- Census of Canada, for southern Alberta
- Military service
- City property assessment records
- City directories

The Guild web site could offer similar services as data resources become available.

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