



Boost Your Productivity with an Accountability Group

by Shannon Green, CG

Have you found that you need more focus and motivation in your genealogy pursuits? Are you feeling isolated in an industry where research is typically conducted independently? These feelings of isolation and lack of focus and motivation can impede your ability to succeed. To help boost your productivity, consider joining or starting an accountability group.

An accountability group is formed when like-minded individuals come together around a specific personal or professional focus. It creates a supportive and motivational environment where members set and pursue goals and are held accountable by peers. Typically, they consist of a small group of colleagues who meet regularly. Accountability groups are not a new concept—people have understood the power of peers for decades.

There are many different types of accountability groups for genealogy, regardless of whether they are specifically called by that name. Groups might focus on topics such as building a business, seeking certification, improving writing skills, or solving complex cases. Members establish regular check-ins, either in person or virtually. The group acts as a source of motivation and offers a sense of community that might otherwise not be present in daily work.

What are the Benefits of an Accountability Group?

By participating in an accountability group, you can benefit in the following ways:

- **Develop clear goals.** Accountability groups encourage members to set clear goals. Articulating your goals to others will help you determine more precisely what you want to accomplish so you can create short-term and long-term objectives and identify the tasks required to achieve those

goals. By sharing your goals with your peers, you become more committed to them, increasing your likelihood of success.

- **Boost motivation.** One of the key advantages of joining an accountability group is increased motivation. Participants are committed to fulfilling the group's purpose and supporting each member's goals. This positive peer pressure can be inspiring and help you maintain your drive and determination.
- **Increase self-discipline and accountability.** The main purpose of accountability groups is to hold people accountable. You are more likely to avoid procrastination and prioritize your goals if you are accountable to your peers and don't want to disappoint them. You will have increased self-discipline to comply with the expectations of your group. Well-defined deliverables and periodic updates encourage members to remain committed to their project or plan.
- **Share knowledge.** Every person in an accountability group brings their own perspective, background, education, expertise, and knowledge. This diversity can help members learn alternative ways to approach projects, use methodologies, overcome obstacles, or implement previously unused strategies. Collaboration can lead to more successful outcomes. Sharing your expertise with others can provide personal satisfaction.
- **Receive support and encouragement.** A support system is important when focusing on difficult goals. If you feel discouraged or daunted, being part of an accountability group can be uplifting and help increase your resiliency. Similarly, an accountability group can celebrate your achievements when you meet your goals.

- **Connect through networking.** Besides support and encouragement, networking is an important part of accountability groups for the genealogy industry. Research can be isolating; colleagues can provide networking opportunities. Additionally, your group members can help connect and introduce you to others in the industry.

Clear goals, enhanced motivation, increased self-discipline, and being part of a supportive community will boost your productivity. Consider what type of accountability group might help you meet your goals.

Example of a Successful Group

I am a part of an accountability group that I affectionately call “The Three Musketeers.” This is the story of how our group began, how it has evolved, and how we view our successes.

How It Started

In 2014, I enrolled in Boston University’s certificate in genealogical research program. The course was entirely asynchronous. Students submitted assignments and interacted with instructors and peers on discussion boards. Two of my classmates were Jan Joyce and Ann Raymont. After the class ended, Jan contacted me and Ann to see if we would be interested in keeping in touch. Jan said she targeted us because she liked our contributions to the discussion boards. At the time, we were all intermediate genealogists. Jan was interested in teaching, Ann was interested in genetic genealogy, and I was interested in launching a business as a professional genealogist. Our individual goals and skill sets were diverse and complemented each other.

At first, we would send sporadic emails about something we learned, a question we had, or to connect. We decided to meet in person at the 2015 National Genealogical Society conference in St. Charles, Missouri. We also met at the 2016 Association of Professional Genealogists Professional Management Conference in Fort Wayne, Indiana, where Jan spoke at her first national genealogy conference. We have subsequently joined each other for research trips in Washington, DC, and Salt Lake City, and attended several institutes together.

How It Evolved

We began by sharing our education plans and providing input and suggestions on each other’s plans. In 2016, Ann suggested we start writing our monthly goals and sharing them as they relate to genealogy. On the first of each month, we send each other emails assessing how we did on our prior month’s goals and laying out the goals for the current month. According to Ann:

At first, I got the most value out of the extra effort I’d put in, to be able to change an “In-Progress” task

status to the bright green “Done!” before sharing my monthly report. Over time, I’ve come to really appreciate the perspective we offer each other. If I have a goal that seems to stagnate, I know Shannon and Jan will challenge me: perhaps there’s an article, tool, or course they’ll suggest that might help me push it forward. Or maybe they’ll ask if that objective is really still important to me. Should I move my priorities around? Or they might ask what I could take off my plate to free up more time. Our group helps me move forward and find balance.

My monthly goals are usually a mix of objectives and tasks. I divide my list into the following regular sections:

- Researching
- Writing
- Continuing education
- Teaching
- Volunteering

Long ago I decided that taking research clients was no longer a goal of mine. Instead, each of these sections represents my current goals. I want to continue researching different parts of my tree and new-to-me geographies. I want to write articles and submit them for publication in genealogy journals and magazines. I value education, so I am always trying to incorporate learning. Giving back to the genealogy community by teaching, mentoring, and volunteering is also important to me.

During the pandemic, we added a ninety-minute, mid-month Zoom meeting to our monthly emails. This meeting allows us to share more than just our goals. Examples include demonstrating a new tool and how we use it, getting input on a research problem, practicing a presentation, or providing a more in-depth project update.

In addition to sharing our monthly goals and our mid-month Zoom meeting, we also meet in December to share our annual goals for the upcoming year. These annual goals are what drive our monthly goals and objectives. Inevitably, there are many emails throughout the month, such as requests for feedback on articles we are writing or help deciphering handwriting.

Successful Outcomes

I have always found the first and last weeks of the month to be the most productive. After I articulate my goals and send them to the group, I am excited and energized to start the work. The last week of the month is also very productive because I want to report success, and I am motivated to complete as much as possible before sending out the monthly update email.

The Three Musketeers accountability group has benefited all of us tremendously. We encourage each other and celebrate each other's successes. In the eight years since we established our group, we have all become certified genealogists and published complex case studies in the *National Genealogical Society Quarterly*. Aside from encouraging each other professionally, we have become great friends. Without this accountability group, I would not have accomplished many of the goals I set for myself. Jan agreed: "Our journeys have evolved and our group with it. We have each articulated that we don't think we would be as successful as we are if we hadn't had each other along the way. We eagerly anticipate being together in person at a conference or institute. And we are planning our ten-year anniversary next year as our own writer's retreat."

Other Genealogy Accountability Groups

There are many other examples of accountability groups for genealogists. Here are some other models that are structured differently than The Three Musketeers.

DNA PiPs (Projects in Progress)

Dana Leeds recently began an accountability group focused on members presenting and getting feedback on DNA projects. Some projects are just getting started; others are almost complete. The group has thirteen members, and two present their projects at each meeting. The group provides feedback on these ongoing projects, and members provide updates as the projects progress. Regarding the impetus for starting the group, Leeds said: "I started DNA PiPs (Projects in Progress) mainly to create accountability for myself—and the members—on our projects. It's a lot easier to get work done when working for a client, but it's often hard for us to find the time to work on our projects. The other primary reason for the group is for us to be both teachers and learners. As we share the procedures and methodology we're using, others are learning and getting ideas for how they can implement the same methods in their research."

This group was modeled after a "DNA & the GPS" accountability group that Leeds co-led with Mary Kircher Roddy in 2020. That group held regular meetings that included instruction and roundtable discussions. Members partnered up, and those two-person teams met separately to share their projects more fully. They focused on having DNA projects that met the Genealogical Proof Standard (GPS). That group was scheduled for a limited number of weeks.

Certification Discussion Group Accountability Group

Another example of an accountability group is part of the Certification Discussion Group (CDG) program sponsored by the

Sample Monthly Goals

Researching

- DNA PiP project research on identifying the parents of Margaret Smith: I am presenting my project this month
- 1880 DC census: figure out a way to get copies of the original census to capture missing pages
- Barnwell County folks: consider if Easterling family could be an article and which publication

Writing

- APGQ article: hope to send you guys a draft in next week
- NGS article: finish editing
- OnBoard article: coming out this month

Continuing Education

- NGS conference in VA. Can't wait to see you guys!
- Attend day-long seminar with Judy Russell (in person!)

Teaching

- Reisinger lecture: need to start
- SLIG assemblage lecture: finish syllabus
- GenProof mentoring: 2 more weeks

Volunteering

- DAR volunteer genealogist
- BCG trustee
- BCG Ed Fund trustee
- BCG Conference Committee co-chair
- BCG assistant treasurer: new role

Seattle Genealogical Society. It offers groups for its alums who desire extra motivation and accountability to complete their portfolio for the Board for Certification of Genealogists (BCG) to become certified genealogists. Their groups consist of three to five members and meet monthly to support each other in working on their portfolios, with the understanding that they cannot specifically discuss the content of their portfolios following BCG requirements. These are completely peer-led groups without instruction. Participants feel a sense of community and camaraderie, which helps motivate them to move forward with their portfolio.

Start Your Own Accountability Group

Given the benefits of being a part of an accountability group, consider starting one to help boost your productivity. The examples above demonstrate how genealogy accountability groups can work. To help you create a group, consider the following.

Set a Focus

Accountability groups need a purpose to which all members agree. Will your group focus on tackling brick walls? Advancing individual goals? Launching a new business? Improving presentation skills? You pick the topic, which can be time-limited or ongoing. For example, if your group's focus is ICAPGen's Level 1 exam, you may disband once all members have submitted their projects. On the other hand, if a group is focused on submitting articles to genealogy journals, the group might continue to meet until it is no longer relevant or helpful to the members.

Choose Members

Choosing the right members is key to the success of your group. Consider the number of participants you want in your group. It could be as small as two, or significantly larger. A smaller group makes members feel a higher sense of commitment as everyone's presence (or absence) is felt. However, a larger group means that you have more expertise and knowledge. Typically, successful accountability groups have three to seven members.

To leverage the knowledge base of all the members, select people who bring diverse perspectives and experience. This diversity fosters a rich learning environment where discussions, brainstorming sessions, and feedback allow group members to gain fresh insights and discover new strategies.

Ideally, members should be at similar levels. Everyone should have something valuable to contribute. If there is one person who is significantly more experienced, then the group could be imbalanced. It might become more of a mentorship group where other members are reluctant to share their ideas if they don't have as much expertise to offer. If the group is made up of people at a similar level, then everyone can grow and learn together. Select people who actively motivate, encourage, and participate rather than sit on the sidelines.

Pick a Format

The structure of an accountability group provides the framework for success. Groups can meet in person or virtually. If virtual, groups can connect asynchronously via email or synchronously over a video platform such as Zoom. The ability to see members (even on a video screen) strengthens the connection, leading to higher commitment and accountability. Many people are comfortable with platforms such as Zoom, and these types of programs allow participants to share their screens, which can help

facilitate virtual meetings. It might be helpful to include at least one member who is competent at managing the different technologies your group chooses to use.

Deciding on the frequency of regular check-ins is important. Meetings could be held weekly, biweekly, or monthly. The schedule should allow members enough time to move forward on their projects between sessions and not be held so frequently that completing action items is unrealistic. Groups that meet on an as-needed basis are generally less successful. Establishing mutually convenient and consistent meeting times is vital for maximum participation.

The agenda for an accountability group can vary. Will there be a roundtable discussion where everyone participates, or will some people be assigned to speak at certain meetings while others provide feedback? The agenda will depend on the group's purpose.

What to Do If a Group Stalls

What do you do if your accountability group loses steam or is no longer working? You have three choices: (1) continue in an ineffective group, (2) try to evolve the group to be more effective, or (3) disband. It is common for groups such as this to run their course. Consider whether you need to add or remove a member. Change the format or the frequency of your meetings. Before deciding to disband, contemplate taking a pause. Members' interests and commitments can ebb and flow based on outside pressures and obligations to work and family.

Conclusion

An accountability group might be the answer to increasing your performance. Embrace the opportunity to collaborate with peers in the supportive environment provided by one of these groups. The examples of different genealogy-related accountability groups demonstrate diverse approaches to aid participants in reaching their goals. Consider starting an accountability group to boost your productivity.



Shannon Green, CG, is a genealogy researcher, writer, and educator. She started looking into her ancestry in 2010 and has been debunking family lore, overturning family traditions, and wrecking the idealized version of her family history ever since. Her research is primarily focused on extending her female lines. She earned the certified genealogist credential in 2017 and renewed her credential in 2022. Shannon serves as a trustee for the Board for Certification of Genealogists and as a trustee for the BCG Education Fund. Shannon lives with her husband and three children in Greenwood Village, Colorado.