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## History Seminar

### *Collections and Community*

### *Trove and NSW Historical Societies*

11 November 2025: 10.30 am to 3.30 pm

History House  
133 Macquarie Street, Sydney  
Or join us Online

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## HANDOUTS

Topic	Prepared by
YouTube for History Societies	Leonie Bell, Botany Bay Family History Society
RAHS Affiliated Societies – Survey	Suzanne Holohan, RAHS General Manager   Company Secretary
Advertising with the RAHS	Phillip Jaworski, RAHS Digital Media   Membership Services
Directors/Officers Insurance: Deciding if your organisation needs insurance for its officers/management committee <i>[NB: this is general advice – each society will need to decide what meets its unique needs]</i>	Suzanne Holohan, RAHS General Manager   Company Secretary
Tap and Pay Systems – Example of set up	Lorraine Neate, Illawarra Historical Society   RAHS Affiliated Societies Committee (ASC)
What to think about when getting a mobile phone for your Historical Society	This is a summary of discussion points and comments made during session B.

### LINKS RELATED TO DISCUSSION ON CATALOGUING COLLECTIONS

**Museums & Galleries of NSW (MGNSW)** provides **free cataloguing resources** on its website, including practical worksheets and templates for documenting objects and images. MGNSW also offers guidance on **how to choose a collection management system**, which is helpful for societies currently using spreadsheets or Word documents and considering moving to cataloguing software.

<https://mgnsw.org.au/sector/resources/online-resources/collection-management/cataloguing/>

<https://mgnsw.org.au/sector/resources/online-resources/collection-management/collection-management-systems/>

**The Australian Museums & Galleries Association Victoria (AMaGA Vic)** *Small Museums Cataloguing Manual (5th Edition)* is for small, volunteer-run organisations, and includes guidance on computer-based documentation and digitisation. MGNSW recommends this manual.

# YouTube for history societies

## Why YouTube?

- Increase public exposure to club
- Interest new membership
- Increase local historical knowledge of members and visitors to the site

## My top tips.

### 1. It's easier than you think.

You don't need to be a History Channel documentary film maker to make a YouTube. There are a number of formats you can choose from.

- Text and photos with music background – a good place to start
- Live Action Use your phone camera for an explanatory video by recording yourself or a member.
- Screencasting: Record your screen for a demo showing people how to use a computer program.
- Animated: Make an animation using [www.https://powtoon.com](https://powtoon.com) – Don't suppose that animation is just a kid's cartoon, although that's a great idea for introducing children to history. Animation is a great educational tool for explaining concepts.
- Mixed Media: Make a mix of filmed live segments with still photos and maybe even some animations or diagrams.

## Online video making tools make it easy

- There are lots of simple to use video creation tools online. Many video making tools have free versions. If you like their functioning and want access to more resources and tools you can take out a subscription. Some have educational institution rates or charity rates for registered charities.
- Clipchamp: Use Microsoft's free tool to put together photos and short video clips from your phone camera
- PowerPoint: Probably a tool you already know how to use, but did you know you can make a PowerPoint and save it as an mp4 video? – you need to animate the text, objects and photos and add a transition with automated timings. No static slides please. PowerPoint has sophisticated animation possibilities with practice, but when you add a music soundtrack it often glitches in the playback. If you want to learn more about animating PowerPoint I recommend the *Presentation Process* YouTube channel. <https://www.youtube.com/@PresentationProcess>
- Canva: [www.https://canva.com](https://canva.com) – Canva is essentially working with a series of animated slides which are saved as an mp4 video file. The advantage of Canva is they have lots of templates, stock photos, stock video clips and stop music tracks to insert into your video. Some are available on a free subscription, but I recommend paying for it if you like the program. The slide and object animation pre-sets are easy to apply, with many built into the templates. The animation is not as versatile as PowerPoint, however, there are no sound glitches with Canva. To me that's more important which is one of the reasons why I use Canva rather than PowerPoint.

## 2. KISS

Keep it simple. A video is not an in-depth article such as you might prepare for your society journal. It is highly simplified. Before starting the video creation, write your script and note ideas for the type of images you want to include. For videos created as a series of slides you should keep the text to a single sentence per slide. If you are planning a voiceover, 135 words equates to one minute of video. Use a two-column table to plan this. E.g. write the text on the left and what kind of visual you want in the right.

Video Title:	
Text or voiceover	Image
1.	
2.	
3.	
4.	

## 3. Keep it short

If you have a few million dollars to spare, a professional director and a sophisticated cinematic camera (not to mention lots of industry contacts) you can keep people entertained with a 30 minute or one hour documentary on TV. For YouTube the key is to keep it short- maybe 3-5 minutes. A really long YouTube might be 15-20 minutes, but I don't recommend this. Make lots of short info bites. You could also go really short and do a Facebook, Instagram or TikTok clip. Facebook format is square and Canva have a format for each type of video. Facebook video of a minute or two length is great to highlight objects in your museum collection.

## 4. Add a soundtrack

Voiceover: only if you have a member with a clear well-produced voice and excellent enunciation. Quality voice over is harder than you might think and requires practice. Tools such as Canva and PowerPoint have the capacity to record your voiceover directly onto the slides.

AI voiceover: not my favourite. The voices often lack inflection (the rise and fall of natural speech) and become very monotonous even within a 5-minute video. Also, you can't control the speed of the AI narration and often it mispronounces words really badly. Many online tools such as Canva include the ability to create a simple AI voiceover.

Music: The simplest method is to add a music track in mp3 format when using Canva. You can also download free soundtracks from websites such as Pixabay. <https://pixabay.com/music/>

Alternatively use the free open-source Audacity app which you install on your PC to record and mix audio. <https://www.audacityteam.org/>

## 5. Creating a YouTube channel isn't scary

It sounds difficult but it's really easy. A channel is required to upload videos and is the way an organisation groups and promotes their YouTube videos. You will need a society email (don't use your personal one). If your society doesn't have a club one, it's easy to create a free gmail address e.g. yourclubnameadmin@gmail.com. You then use that to log in to Google Chrome

and your club's YouTube account. Don't use your own Google Chrome login or your personal YouTube account. If someone else takes over from you they can use the same account. You don't want to mix your personal YouTube subscription data with the club's one.

I recommend watching *Kevin Stratvert's* excellent video on how to set up a YouTube channel and upload your videos.

*How to Make a YouTube Channel (17:41 minutes)*

<https://www.youtube.com/watch?v=zRZpmkln5Ac>

## **6. Copyright**

Be VERY, VERY careful of copyright. If you breach copyright both you and your society risks being sued. We are talking hundreds of thousands of dollars.

Photos taken pre-1 January 1955 are out of copyright, but a scan of that photo is copyright to the person or organisation that scanned it. Copyright exists for 70 years after the death of the creator and clearly there are no scans that meet that criteria.

Many Australian organisations are pretty good in allowing permission if you ask them first and credit them, but often overseas organisations are not so helpful and want payment.

Don't assume that because you found the photo on the internet and used the Usage Rights tool that Google has correctly interpreted the information. If you use a Wikimedia Commons photo, don't just insert the picture without attribution. Go to the usage rights section for that photo and get the correct citation to add to your video slide.

If in doubt email them to ask permission and explain you are making a non-profit video for your club's YouTube channel. Save their reply to your personal records and club records as a pdf in case of questions later.

Birth Death and Marriage documents and many other official records are copyright so don't put in photos of birth certificates etc.

If you use Canva there are thousands of stock templates, photos videos and music tracks. However, note that your subscription grants you a one download licence. I give my President a public link to view a video before I download it. Once it's approved I then download it to my PC once only, then upload it to YouTube.

When you click the Share button on Canva it gives you the option to link your Canva account to the club's YouTube channel. Do this before downloading the video. This should remove most of the problems.

In general, remember I am not a copyright specialist and it's up to you to accurately determine whether you can include something without infringing copyright. Better to be cautious than be sued!

## **7. The internet is forever**

Remember that even if you later delete something, anything placed on the internet is there forever, as someone will have downloaded it, saved it or shared it. Don't put up anything sensitive, personal or potentially discriminatory.

## **8. Some potential topics**

- Family stories
- Local history titbits
- History of an interesting building, monument or local place
- How a town or place got its name
- Biography of a local historical identity
- Information on your society's resources
- How to videos: e.g. How to research a particular topic, How to use a computer program for your history research, How to research local history
- Summary of a society member's local history research project or journal story
- Portrait of a local history museum, local history library or research resource
- Interesting stories from the graves in your local cemetery
- Museum collection objects

## **9. Upload regularly**

I make one video per month and schedule it to release on a specific date each month. Of course, you could do more if you are keen.

## **10. Share**

Ask members to subscribe to your channel and share the videos on their other social media platforms. Monitor how many likes and subscribers you have. You won't make any money from this, but that is not really the goal. It takes a minimum of 1,000 subscribers watching 4,000 hours of videos before you start to gain income. Advertise each video in your journal or e-newsletter to encourage members to view, like and share the videos. It will take time to build an audience.

**Check out Botany Bay Family History society's channel**

<https://www.youtube.com/@BotanyBayFHS-1>



**SESSION B: November 11, 2025, 1.30 pm – 3.30 pm**

**Connecting Community:**

**Supporting and Sustaining Historical Societies**

## **RAHS Affiliated Societies – Presentation Handout**

**Presenter:** Suzanne Holohan, RAHS General Manager and Company Secretary

# **RAHS AFFILIATED SOCIETIES SURVEY 2025**

## **About the Survey**

The 2025 RAHS Membership Survey received responses from 165 affiliated societies, representing 45% of our network. The survey explored four key areas:

1. About Your Organisation
2. Your Activities and Challenges
3. Your Relationship with the RAHS
4. Looking Ahead

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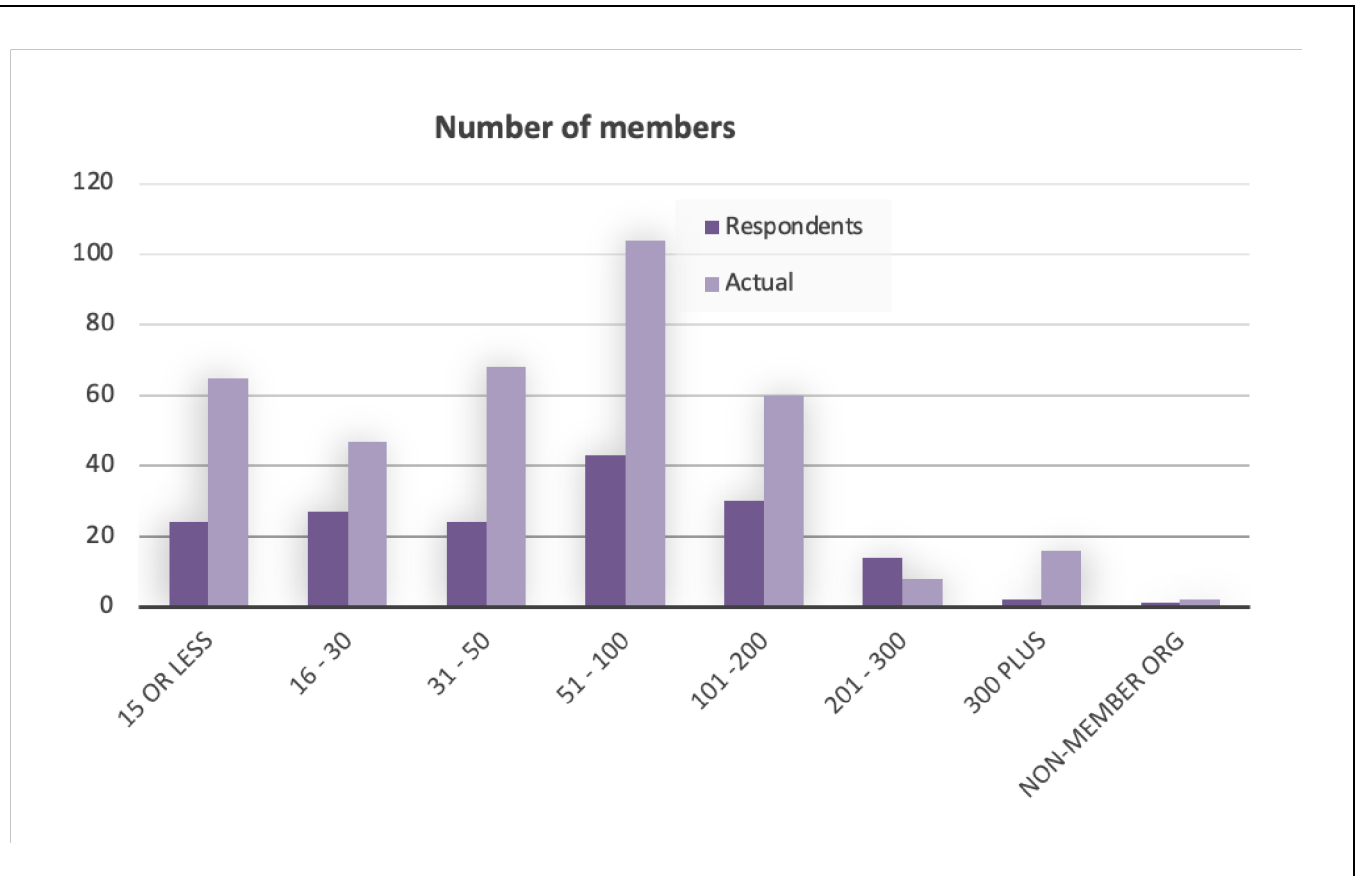
## **Who Are Our Affiliated Societies?**

### **The "Average" Affiliated Society Profile:**

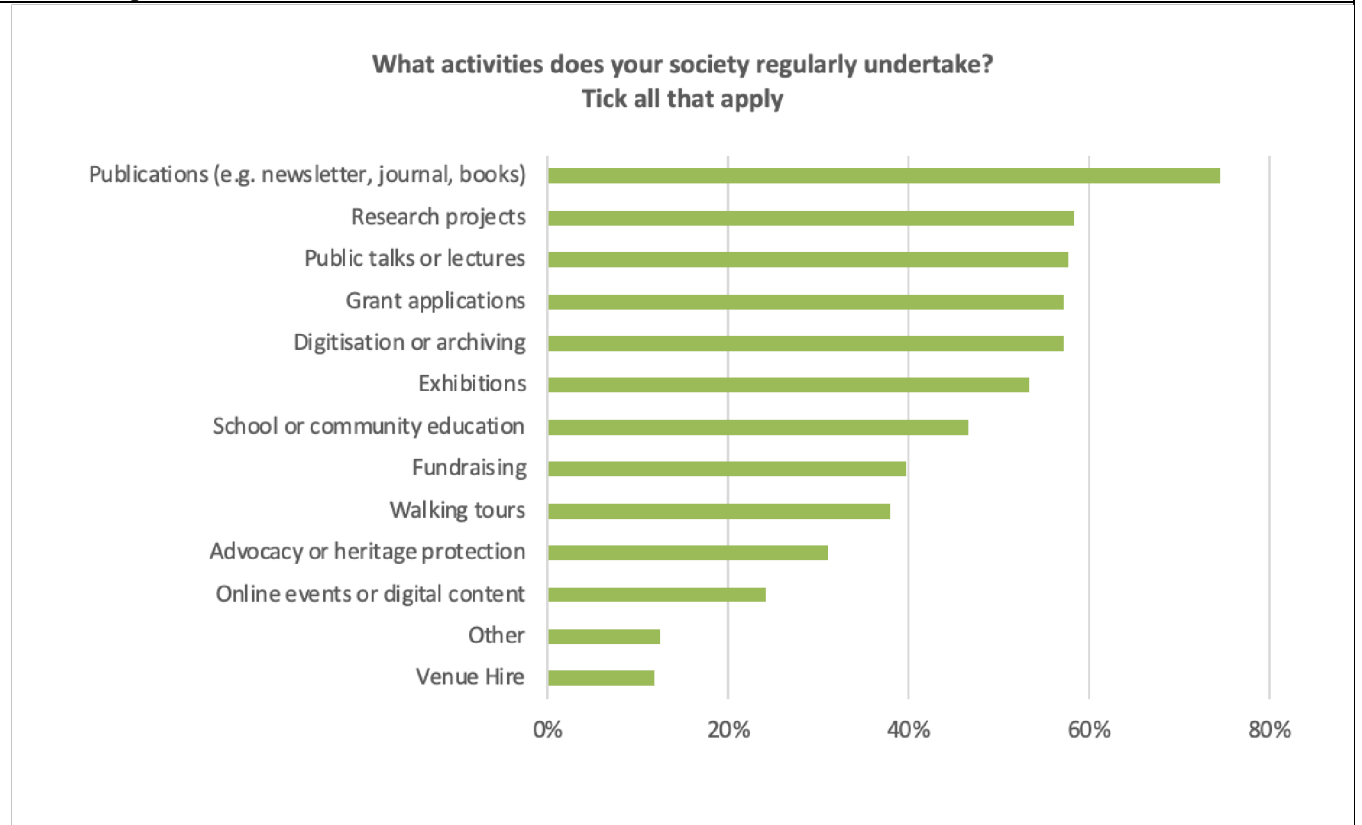
- ✓ Volunteer-run organisation
- ✓ Conducts all three core activities: Publications, Research Projects, and Talks
- ✓ Based in Regional NSW (68% regional, 18% Sydney, 17% Western Sydney)
- ✓ Has 100 members or fewer
- ✓ Is a registered charity
- ✓ Does NOT have DGR status
- ✓ Is incorporated under NSW Associations Incorporation Act 2009 (93%)
- ✓ Focuses on history of a place (42% local/place-based history)

### **Key Statistics:**

- **97%** are based in NSW
- **93%** are incorporated associations
- **50%** are registered charities with ACNC
- **24%** hold DGR (Deductible Gift Recipient) status
- **~3,000** active volunteers across the network
- **50%** have been affiliated with RAHS for over 20 years



The survey received responses from 165 affiliated organisations, representing about 45% of the total RAHS affiliate network. Most responses came from small and medium-sized societies, which make up most RAHS affiliates. Societies engage in a diverse range of activities – publications, research and talks are the top three.



## What We Share: Joys and Challenges

Top Joys: Rewarding part of your work	Major Challenges: Rated 4.0 or higher out of 5.0:	
<ul style="list-style-type: none"> <li><b>30%:</b> Preserving collections and local heritage</li> <li><b>22%:</b> Running museums and exhibitions</li> <li><b>19%:</b> Research and publications</li> <li><b>6%:</b> Community engagement and events</li> <li><b>6%:</b> Education and lifelong learning</li> <li><b>4%:</b> Advocacy</li> </ul>	Recruiting new members	4.65
	Keeping existing members engaged	4.53
	Attracting or retaining volunteers	4.53
	Succession planning	4.40
	Raising public awareness	4.38
	Maintaining website/digital presence	4.20
	Insurance and legal obligations	4.10
	Managing, preserving or digitising collections	4.03

### Moderate Challenges (Rated 3.5–3.99 out of 5)

- Balancing administrative workload (3.99)
- Access to funding or grants (3.94)
- Managing or maintaining premises (3.36)

### Other Challenges

Ten open-ended responses gave more insight into the pressures societies face. These mentioned:

- reliance on local councils or state agencies for building access or maintenance.
- the time needed to build partnerships with libraries, museums and community groups.
- the challenge of funding even part-time staff to keep venues open.
- extra responsibilities for societies managing Crown Land or heritage-listed sites.
- uncertainty about tools and skills for online engagement.
- the need to keep heritage issues visible within local government priorities.

## RAHS Membership – What You Value Most

A total of 157 affiliated societies responded to this question about their use of Royal Australian Historical Society (RAHS) services. Most societies reported using at least one of the services listed, showing strong engagement with RAHS programs and resources.

RAHS Service	%	Comments / Observations
Insurance Program	90%	The most widely used service. Nine in ten societies participate, confirming that insurance remains a major area of engagement across the affiliate network.
RAHS Publications	68%	More than two-thirds read the <i>JRAHS</i> and <i>History</i> magazine, showing strong awareness of RAHS print and digital communication channels.
RAHS-administered Grants Program	38%	Over one-third of societies have received or applied for an RAHS grant, demonstrating broad participation in this support program.



Promotion and Advice	20– 25%	Around one-quarter of respondents use RAHS promotion channels (25%) or seek advice on managing a historical society (20%).
RAHS Service	%	Comments / Observations
RAHS Events (Conference or Workshop)	15– 17%	Seventeen per cent had attended a Conference and 15% a Workshop. Distance is a barrier for some regional affiliates. One respondent noted, “We are regionally based, 900 kilometres from Sydney and find it impossible to attend events offered close to or within the metropolitan area.”
Research and Library Services	10– 14%	Fourteen per cent have used RAHS research support and 10% have accessed the RAHS Library.
Hosting or Co-hosting Events	10%	Ten per cent have hosted or co-hosted an RAHS event.
Other	4%	Several societies mentioned the value of Zoom and digital presentations, particularly for those located hundreds of kilometres from Sydney. Others noted that their use of services occurred several years ago or that committee changes had affected awareness of current programs.

### Overall Rating of RAHS Affiliation:

- **46.5%** rated it "Excellent"
- **46.5%** rated it "Good"
- **6.4%** rated it "Fair"
- **0%** rated it "Poor"

## Better Support – What You Told Us

### Top Requests (over 5% of responses):

- **22%:** Regional workshops and online options
- **21%:** Happy with current support
- **15%:** Updates and clearer information on how RAHS can help
- **10%:** Provide or help source speakers
- **8%:** Guidance on identifying and applying for grants
- **7%:** Increase promotion and visibility of affiliate work
- **6%:** Advocacy

## What We Are Going to Do – Short-term

Based on your feedback, RAHS will:

- Launch new column in eNewsletter – 'Agony Aunt' for member questions
- Plan another affiliated societies event focusing on your priority areas
- Promote your societies – send us something we can share!
- Prioritise grants information in eNewsletter
- Hold workshop before relaunch of new Cultural Grants program
- Have a lot to think about – so working on new strategy to launch at April AGM

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# ADVERTISING YOUR EVENTS WITH THE RAHS

## **RAHS eNewsletter – Who subscribes to it:**

- Individual members of the RAHS
- Affiliates and their members
- General public, who share an interest in Australian history

## **What we need:**

- A nice, high-resolution image (with copyright permission), e.g. historic image/book cover
- Text about your event or news (150–200 words)
- Event details: Where, When, Admission
- RSVP and/or booking information
- Please note: We do have limited space, so it's 'first in, best dressed', but we try to feature societies who have not been included previously or recently.

**Please note:** We do have limited space, so it's 'first in, best dressed', but we try to feature societies who have not been included previously or recently.

## **Benefits of advertising through the RAHS eNewsletter:**

- More exposure for your events and society
- Potentially reach new people who have an interest in history
- You can get ideas about what other societies are doing, i.e. research/grant projects
- You can get ideas for potential speakers for your events

## **What to do next:**

- Check you are subscribed to the eNewsletter
- Share the eNewsletter with your members
- Send us something we can promote!

# DIRECTORS & OFFICERS INSURANCE

## Directors & Officers (D&O) Insurance – Simple Explanation

"Protects committee members personally if they're sued for decisions made while running the organisation."

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## What D&O Insurance Covers: People and Decisions

### Who is protected:

- Committee members
- Office bearers (president, treasurer, secretary)
- Your society as an organisation
- May extend to volunteers or members acting on behalf of the organisation

### "Wrongful acts" covered include:

- Errors of judgement or mismanagement
- Breach of duty or trust
- Negligent advice or misleading statements (e.g., providing incorrect information to members)
- Governance disputes
- Failure to meet legal obligations

**Goal:** Protect people acting in good faith from personal financial liability

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## What D&O Insurance Does NOT Cover

- X Deliberate, fraudulent or criminal acts
  - X Accidents or injuries → Public Liability or Volunteer Accident policy
  - X Property or collection damage → separate policy
  - X Individual defamation or personal social media posts by your members or the general public
- 

## Do You Need to Take Out D&O Insurance?

**It isn't mandatory – it's a personal and organisational decision**

### When deciding if it's right for your Society, consider:

- How complicated is managing your organisation?
- What are the risks?
- What is the cost of this insurance?
- Is someone likely to join your management committee if you don't have it?

## Cost Guide:

- Typically ranges from **\$500–\$1,000** for small volunteer groups
- **Several thousand dollars** for larger organisations
- Price depends on: number of committee members, assets/revenue, claims history, and activities

**RAHS Example:** RAHS has D&O coverage because we have:

- Employees
- Total \$21 Million in assets, including a heritage-listed building
- Manage a share portfolio, significant donations and manage \$200K+ in grant programs
- Hold multiple contracts, including the NSW Government
- Have a wide audience reach and multiple social media channels.

**Smaller societies** may rely only on good policies and practices to ensure they meet all their obligations.

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## What You Can Do Now – With or Without Insurance

- ✓ Maintain clear governance policies (financial delegations, conflicts of interest, minutes)
- ✓ Ensure compliance - can include ACNC, WHS, Fair Trading, your local Council and your constitution
- ✓ Have handover documents, including roles and responsibilities for your committee members
- ✓ Ask for help - including the RAHS Affiliated Societies Committee and forums
- ✓ Keep clear minutes showing the reasoning behind committee decisions
- ✓ Review insurance annually and ensure all areas of activity are covered, or if your circumstances have changed
- ✓ Send us an email if you want to talk about D&O insurance with Marsh (contact details below)

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## SPECIFIC QUESTION: D&O Insurance and Social Media Defamation

**Question:** Would D&O insurance cover us if someone accused our society of defamation based on a Facebook post/comment?

**Context:** Under Australian law, your society can be held responsible for defamatory comments made on your Facebook or other social media platforms.

**Answer:** It depends on who posted and in what capacity.

**The Key Test:** Was the person acting in their official director/officer role when making the statement?

✓ **Likely Covered (but check your policy):**

- Official posts on the Society's Facebook page or social media accounts
- Statements made by committee members acting in their official capacity

## **X NOT Covered:**

- Facebook posts by committee members made on their personal accounts (even about society matters)
  - Individual members' opinions on their own social media accounts
  - Comments by members not acting in an official role
  - Random comments left by the general public on your social media
- 

## **Best Practice Policies for Social Media Protection**

### **Don't rely on insurance alone – good governance is your first line of defence:**

- ✓ Develop a clear social media policy for your society
  - ✓ Define who can post on official accounts and keep records of who has access
  - ✓ Monitor and moderate your social media pages regularly
  - ✓ Remove defamatory comments quickly once you're aware of them
  - ✓ Consider turning off comments on sensitive posts
  - ✓ Document your moderation efforts
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## **IMPORTANT: Changes in Australian Defamation Law (2024)**

### **New Protections for Organisations (NSW, ACT, Victoria from mid-2024):**

You can now defend yourself against liability for third-party comments IF you:

1. **Have a complaints process** in place
2. **Remove alleged defamatory content within 7 days** of being notified
3. **Document your moderation efforts**

### **Background:**

- The 2021 High Court case *Fairfax Media v Voller* held organisations liable for third-party comments on their pages
- New reforms introduced July-September 2024 provide a defence called "innocent dissemination"
- Applies to "mums and dads who host community Facebook pages" – including historical societies

**Action Required:** Don't just hope for the best – implement content moderation policies

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# ADDITIONAL INFORMATION: UNDERSTANDING INSURANCE TERMINOLOGY

## Quick Reference Table: Types of Insurance at a Glance

Insurance Type	What It Protects	Common Claims Examples	Do You Need It?
<b>Public Liability</b>	Injury or property damage caused to third parties by your organisation's negligence	Visitor trips, Damage to hired venue, Injury during walking tour	Essential for any society with public events, visitors, or activities
<b>Personal Accident (Volunteer)</b>	Volunteers injured while performing duties for your organisation	Volunteer injured moving equipment, Accident during setup/pack down, Injury at research trips	Important if you have active volunteers doing physical tasks
<b>Property &amp; Contents</b>	Physical damage or loss to buildings, collections, equipment	Fire damage to archives, Theft of equipment, Flood damage to collection	Essential if you own premises or valuable collections
<b>Directors &amp; Officers (D&amp;O) / Management Liability</b>	Committee members sued for decisions made while managing the organisation	Alleged breach of duties, Misleading information to members	Consider if complex operations, employees, significant assets, contracts with government
<b>Cyber Liability</b>	Data breaches, cyber-attacks, online incidents	Member data breach, Website hacked, Email scam affecting finances	Growing importance - consider if you hold member data, take online payments, or have significant digital presence
<b>Professional Indemnity</b>	Errors in professional advice or services you provide	Incorrect research information provided, Errors in paid consultancy work	Only if you provide paid professional services or consultancy

## Understanding the Terminology: What's the Difference?

### Directors & Officers (D&O) Insurance vs Management Liability vs Association Liability

These terms are often used interchangeably, but here's what they typically mean:

#### Directors & Officers (D&O) Insurance:

- Core coverage that protects individual directors, officers, and committee members personally
- Covers legal costs and damages if they're sued for decisions made in their official capacity
- Can be purchased as standalone coverage

#### Management Liability Insurance:

- Usually a package policy that includes D&O coverage PLUS additional protections such as:
  - Employment Practices Liability (wrongful termination, discrimination claims)
  - Crime/Fidelity cover (employee theft, fraud)
- Essentially "D&O Plus" - a bundled solution. Mostly used by not-for-profits with employees.

#### Association Liability Insurance:

- Marketing term some insurers use for packages designed specifically for incorporated associations
- Usually includes similar coverage to Management Liability packages

**Key Takeaway:** Don't get hung up on the name – focus on what's actually included in the policy. Ask your broker.

## Cyber Liability Insurance – Growing Importance

As historical societies increasingly use digital platforms, hold member databases, and process online payments, cyber risks are growing:

### What Cyber Liability covers:

- **Data breach response:** Costs of notifying members, credit monitoring, PR management
- **Cyber extortion/ransomware:** Ransom payments and negotiation costs
- **Business interruption:** Loss of income if systems are down
- **Legal costs:** Defence against privacy breach claims
- **Data restoration:** Costs to recover lost or corrupted data

### Common cyber risks for historical societies:

- Member email lists stolen or compromised
- Website defacement or hacking
- Phishing scams targeting committee members
- Ransomware locking access to digital archives
- Payment processing fraud

### Do you need it? Consider cyber insurance if you:

- Hold member contact details or donor information
- Process payments online (memberships, donations, bookings)
- Have digitised collections or databases
- Use email regularly for organisational business
- Have a website or social media presence

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## LEARN MORE – USEFUL RESOURCES

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### Social Media & Defamation

**Not for Profit Law have a handout, prepared in 2023, that outlines the main concepts, good policies and how it all works in plain English.**

<https://content.nfplaw.org.au/wp-content/uploads/2024/12/Defamation-laws.pdf>

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### Understanding Insurance for Not-for-Profits

#### Justice Connect - Not-for-profit Law: Insurance

- Website: <https://www.nfplaw.org.au/insurance>
- Comprehensive free legal information specifically for Australian not-for-profits
- Covers different types of insurance, legal obligations, and practical guidance
- Includes specific information about D&O insurance, public liability, and other key coverages

## NSW Fair Trading - Associations Insurance Guide

- Website: <https://www.fairtrading.nsw.gov.au/associations-and-co-operatives/incorporated-associations/running-an-incorporated-association/insurance-for-incorporated-associations>
  - Official NSW government resource
  - Explains insurance requirements and recommendations for incorporated associations
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## CONTACT US

### Royal Australian Historical Society

- Email: [history@rahs.org.au](mailto:history@rahs.org.au)
- Phone 02 9247 8001
- Website: <https://rahs.org.au>

For questions about D&O insurance specifically, contact us to arrange a conversation with Marsh Insurance brokers. We recommend that you source other quotes.

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### End of Handout



# SETTING UP A “TAP AND PAY” SYSTEM

## Before you begin

To set up and use your Square Reader you need the following:

- A Compatible mobile phone with Bluetooth
- A Square Reader (charged)
- Secure internet connection

## Check the battery level and charge your Square Reader

1. Firmly press the button on the reader and observe the lights.

Four green lights: Battery is 100% charged

Three green lights: Battery is 75% charged

Two green lights: Battery is 50% charged

One solid red light: Battery is 25% charged

One blinking red light: Battery is low – charge immediately.

2. It takes around two hours for a reader with a low battery to charge completely.

## Step 1: Check that BLUETOOTH is “ON”

1. Tap on settings
2. Ensure BLUETOOTH is on

## Step 2 : Install the Square App

1. Go to Play Store
2. Search for Square
3. Install Square Point of Sale for Android
4. Open Square

### Step 3: Create an Account

1. Add email address
2. Enter your Password
3. You will be prompted to enter a verification code
4. Create receipt categories (bottom right three parallel lines)

### Step 4: Pairing the Square device with your phone

1. Scroll down on the following screen to find “Settings”
  2. Select Hardware
  3. Select Square Readers
  4. Connect a Card Reader
- Ensure “Reader” has a tick at the top of the screen

### Step 5: Test Example

Items – will show the categories of payments already created

Test Example – Donation

Add Amount - \$1.00

Review sale

Add customer – tap on Charge

Next screen prompts “Tap or insert into card reader”

Lights on Square device will flash

The following screen requires input for type of receipt (if required)

Finally, Thanks!

## **GETTING A PHONE FOR YOUR NSW HISTORICAL SOCIETY: DISCUSSION POINTS DURING SESSION B**

Having a dedicated phone number can help with payments, enquiries, and secure access to online systems. This guide provides simple options suitable for volunteer-run historical societies across NSW.

### **WHY YOUR HISTORICAL SOCIETY MIGHT NEED A PHONE**

Some points raised during Session B:

- Tap & Pay systems at stalls, events, and museum open days.
- Logins for software and social media (Facebook/Instagram, Canva, Mailchimp, Xero, Microsoft 365).
- Membership and visitor enquiries without using personal phone numbers.
- Committee handovers — if you have a historical society mobile, the number stays with the society, not the individual committee member.

### **DOCUMENTATION YOU MAY NEED**

You will need to identify your organisation when getting a plan/SIM card. Below is information that may be requested:

- Association's ABN.
- Certificate of Incorporation (if incorporated).
- Details of an authorised office bearer (e.g. President or Treasurer).
- Proof of address for the association.

### **If you don't have an ABN:**

You can still get a phone, but it may need to be in an individual committee member's name. Good handover procedures are important in this case.

## PERSONAL VS BUSINESS PLAN

There is no legal requirement for your society to get a 'business plan'. Most smaller groups get a personal plan in their society's/association's name (depends on the company).

### Personal Plans

- Often suitable and cost-effective for small associations.
- No legal requirement to have a business plan.

### Business Plans (Telstra, Optus, Vodafone)

- Useful if your society plans to have more than one phone.
- Enable simpler account transfer when committee members change.
- Generate monthly invoices which assist with financial record-keeping.

## PHONES, PLANS AND DATA

### Choosing the Phone

If using Tap & Pay you will need a:

- Smartphone (iPhone or Android).
- Reliable battery life for event days.
- 4G or better connectivity.
- Minimum 64GB storage (for apps).
- Mid-range phones (\$200-\$500) are perfect.

### How Much Data Do You Need?

- Tap & Pay systems uses very little data.
- 2-5GB/month is enough for most societies.
- More data needed if managing social media from the phone.
- Check coverage in your region before choosing a provider.

## DIFFERENT APPROACHES USED BY NSW HISTORICAL SOCIETIES

One historical society shared that they use an ALDI \$15-a-month mobile prepaid plan to keep their costs low. They generally switch mobile data off and rely on Wi-Fi when available. This meets their needs for a phone to use with Tap & Pay system, without ongoing contract costs.

This is just one model.

Other historical societies said that they choose not to maintain a separate phone and instead have committee members use their personal phones for Tap & Pay applications and two-factor verification. This can work well when responsibilities are shared and there is a clear agreement on who manages each login and device.

The key point is to document the arrangement, so access does not get lost when roles change.

### Practical Tips

- Use the association email to set up Tap & Pay application accounts where possible.
- If you have a phone in the society's name, keep a handover sheet with the password and SIM details.
- Choose prepaid if you are concerned about cost control.
- Check that mobile provider provides good coverage for your location.
- When picking a phone, prioritise reliability and battery life over new features that your society doesn't need.