



## CHULA VISTA GENEALOGICAL SOCIETY

### Standard Operating Procedure

#### SECOND VICE-PRESIDENT, MEMBERSHIP CHAIR

As defined in the Bylaws of the Chula Vista Genealogical Society, the Second Vice-President shall serve as Chair of the Membership Committee. The Chair shall maintain accurate membership records and encourage member participation in Society activities.

The purpose of this Standard Operating Procedure guideline is to further define the responsibilities of this office.

**Responsibility I: The Membership Chair is directly responsible for collecting membership applications and dues as stated in the Standing Rules. Dues collected are to be given to the Treasurer. Dues are refundable only at the discretion of the Board of Directors.**

**Responsibility II: The Membership Chair is responsible for maintaining and keeping accurate and current membership records by:**

- A. Updating the Membership Directory as new members join and issue a new directory to the Board of Directors in January and October, more often if needed.
- B. Keeping an accurate record of new members, renewing and non-renewing members and presenting a full report to the Board of Directors at the end of each year.
- C. Following-up on any non-renewing members and invite them to rejoin.
- D. Keeping a record of individual members' volunteer activities and attendance at Society functions through sign-in sheets.

**Responsibility III: The Membership Chair shall pass the Pedigree charts collected with membership applications to the Research Chair.**

**Responsibility IV: The Membership Chair shall issue name tags with member's name, Society logo and office if a Board member.**

**Responsibility V: The Membership Chair shall encourage new members by:**

- A. Greeting or providing volunteers to greet members and guests at all Society functions.
- B. Providing a guest sign-in sheet at all Society functions.

- C. Introducing and welcoming guests at General Membership meetings and other Society functions.
- D. Maintaining a supply of membership brochures and application forms, ensuring their availability at meetings.
- E. Sending a follow-up letter to guests and include information regarding Society activities and research opportunities available to them, along with an application to join the Society.

**Responsibility VI: The Membership Chair shall oversee the tasks of the membership sub-committees and recruit volunteers when needed by:**

- A. Providing a current roster and talking points to the Telephone Tree for monthly calls to members.
- B. Providing appropriate information to the committee member who sends cards of concern.
- C. Ensuring that a committee member is available to assist at sign-in table and greet attendees at all Society functions.

**Responsibility VII: The Membership Chair shall prepare an annual report for February's Board and Society Annual Membership Meetings.**

**Responsibility VIII: The Membership Chair shall provide a membership survey when requested by the President or the Board.**

**Responsibility IX: The Membership Chair shall apprise the President of any member welfare issues, such as, lack of transportation, illness or death of member or member's family.**

**Responsibility X: The Membership Chair shall notify membership of deaths by the Telephone Tree or e-mail.**

**Responsibility XI: As The Second Vice-President, the Membership Chair shall be prepared to assume the position of President.**

- A. The Second Vice President must always be prepared to assume the responsibilities of the office of President if the President is unable to perform his/her responsibilities. Should the Second Vice President be required to assume the duties as acting President, he/she may appoint another member as acting Membership Chair.
- B. The Second Vice-President shall preside at General Membership meetings and Board of Directors meetings in the absence of the President and the First Vice President and is bound by the same responsibilities.
- C. The Second Vice-President shall familiarize him/herself with all of the business of the organization, its finances, its Bylaws and Standing Rules, policies, objectives and programs.

**Responsibility XII: The Membership Chair shall support Society activities by:**

- A. Making every effort to attend every CVGS Board of Directors and General Membership meetings and fully report on the Society's growth.
- B. Authorizing the purchase of the necessary materials to adequately carry out the requirements of the position. All requests for reimbursement must be accompanied by receipts that clearly delineate the expenses for which reimbursement is requested.

- C. Regularly updating the Second Vice-President's notebook containing the current Society Bylaws, Standing Rules, respective SOP and membership listings. This notebook shall be passed to the succeeding Second Vice-President.

## **ADDENDUM:**

### **Execution of Duties:**

#### **I: Membership Brochure/Application Forms:**

The Chula Vista Genealogical Society has combined membership application forms with the Society brochure.

The Membership Chair is responsible for the master copy.

The Membership Chair shall make any alterations, corrections or revisions to this form, as directed by the Board, with a revision date included to indicate a superseded edition.

#### **II: Membership Directory:**

The Membership Directory is a listing of the active membership, compiled alphabetically by surname.

It must be updated with every change of membership to provide for an accurate reference. A revision date must be included to indicate a superseded edition.

Master Membership Directory should include member's name, address, telephone number and e-mail address.

A member's personal information is considered confidential and may not be released for any non-Society purposes.

To ensure some degree of confidentiality, a separate Directory of only e-mail addresses shall be kept.

#### **III: Membership Attendance:**

Provide sign-in sheets for each Society function.

Maintain separate sheets for active members and for guests; allow space on active member sign-in sheets for any contact changes.

Solicit addresses, telephone numbers and e-mail address of guests for future contact and seek information as to how they heard of activity.

Sheets may be used to identify trends in attendance as well as frequency of individual attendance and could help in programming and scheduling.

Sign-in sheets are to be kept a minimum of three years and then shredded.

#### **IV: New Member Procedures:**

Acknowledge new members at first Society meeting attended.

Upon receipt of membership dues and application form, the new member shall be given a beginning packet which shall consist of the following:

A volunteer participation form.

A five-generations chart.

A family history sheet.

A research checklist.

A research journal page.