



CHULA VISTA GENEALOGICAL SOCIETY

Standard Operating Procedure

RESEARCH/QUERIES CHAIR

As defined in the Bylaws and Standing Rules of the Chula Vista Genealogical Society, the Research/Queries Chair shall answer queries and assist members with research.

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

Responsibility I: Receive and answer research queries submitted to the Society.

- A. Receive and catalog research queries received through the postal mail, via email, via telephone, or through the Society website and/or blog.
- B. Contact the requester so that they know the query has been received. Tell the requester that the Society would appreciate a \$10 donation for the research work, plus any other expenses (copy fees, certificate fees, etc.).
- C. Perform research on query subject using online resources, resources at the Chula Vista Public Library, or resources at another local repository. Make photocopies or digital images of paper or microfilm pages, or capture digital images of online material.
- D. Compose and send a response to the requester describing the actions taken and the results obtained, including copies or images of material found. Postal mail or email (with attachments) is preferred.
- E. Enter appropriate information into the Query catalog.
- F. If a donation to CVGS is received by check or cash, provide the check or cash to the Treasurer and ensure that the correct amount is entered under Research/Queries on the budget sheet.
- G. Report the number of queries received and completed to the Board of directors each month.

Responsibility II: Arrange for, host and report on the monthly Research Group meeting of the Society.

- A. The Research Group meeting is usually the second Wednesday of each month at 12 noon in the Conference Room at the Chula Vista Civic Center Branch Library (365 F Street, Chula Vista, Calif.).
- B. Request the Librarian to reserve the Conference Room or another suitable venue for each monthly Research Group meeting.
- A. At the start of the meeting, call the meeting to order, have attendee introductions, and describe the meeting agenda.
- B. Encourage attendees to share about their genealogical research problems, research questions, research successes, etc.
- C. Note the topics and issues discussed, and prepare an article for the CVGS Blog and Newsletter each month.
- D. Report the date of the next Research Group meeting to the Board of Directors and at the General Meeting.

Responsibility III: Arrange for, host and execute research trips to repositories

- A. Plan and execute three to five research trips to genealogical repositories during the calendar year.
- B. Contact the repository before the trip to ensure they will be open and are aware that the group is coming. Some repositories will provide a short briefing of their holdings.
- C. Provide information about the research trip, at least one month before the event, at the Society General Meeting, in the newsletter, and to the email membership list. Request that attendees notify the Chair so that adequate space is available in the car pool.
- D. Keep a car pool list of volunteer drivers and the riders attending the research trip. The car pool usually leaves from the Chula Vista downtown parking structure and returns to the structure.
- E. Note topics and issues discussed, solicit attendee experiences and successes, and write a report for the Newsletter after the research trip.

Responsibility IV: Receive, catalog, and digitize the information on Society member pedigree charts.

- A. Request each member to provide a five-generation pedigree chart when they join the Society, or on an occasional basis. These charts can be used to help find other Society members who may share the same surnames and ancestral localities.
- B. Place the submitted five-generation pedigree charts in Society notebooks kept at the Chula Vista Civic Center Branch Library.
- C. Digitize the information on the submitted five-generation chart, subject to agreement in writing by the submitting member, using a family tree computer program. Submitting members can also provide a GEDCOM file of their research.
- D. Use a family tree computer program to create an ancestor name list from the submitted material.
- E. Provide the ancestor name lists to the Webmaster for inclusion on the Society website, with surnames entered into the surname index.
- F. The Research/Queries Chair shall anonymize the pedigree chart information so that names of living persons are not exposed on the Society website.
- G. Solicit new or updated pedigree charts or GEDCOM files from members occasionally.

Responsibility V: The Research/Queries Chair shall support Society activities.

- A. Make every effort to attend every General Meeting and meeting of the CVGS Board of Directors to report on research and query activities.
- B. Shall be authorized to purchase 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. Shall keep and update the Research/Queries Chair's notebook containing the current Society Bylaws, Standing Rules, respective SOP and other pertinent data. This notebook shall be given to the succeeding Research/Queries Chair.