

SPECIAL OPERATIONS ASSOCIATION

STANDARD OPERATING PROCEDURE

ANNEX P

ARCHIVIST

I. GENERAL

- A. **PURPOSE.** This Standard Operating Procedure (SOP) Annex is to standardize routine recurring operational and administrative procedures required of the Archivist.
- B. **CONFORMITY.** This annex and all actions taken to implement its directives will conform with the bylaws of the SOA (as amended or dated later) and the Article of Incorporation in the State of Texas, Charter Number 120709501, as amended by Certificate dated 2 January 2003 (or amended by Certificate at a later date).
- C. **DUPLICATION.** Except where necessary for clarity, this annex, to include its enclosures and attachments, will not duplicate the information and directives provided in the documents mentioned in paragraph B above.

II. EXPLANATION

- A. Archives are the non-current records of the association that contain information of enduring value and the artifacts that have been collected over the years. Archival records are also the products of everyday activity of the Association.
- B. Formats represented in the modern archival repository include photographs, films, video and sound recordings, computer tapes, and video and optical disks, as well as the more traditional unpublished and published letters and other documents. Also included are memorabilia collected over the years.
- C. Archival records are the products of everyday activity of the Association as well as memorabilia collected over the years.

III. DUTIES OF THE ARCHIVIST

- A. Establish and maintain control, both physical and intellectual, over records of enduring value.
- B. Arrange and describe the records, in accordance with accepted standards and practices, ensuring the long-term preservation of collections.
- C. Assist researchers from within the association and as directed by the Board of Directors and enlist support for archival programs.
- D. Understand and apply the principles of archival management.
- E. Identify and preserve records and hold them accessible for use.
- F. Collect the existing compact disks with old membership files and transfer all of the images to an appropriate directory on the computer hard drive. Place the CDs in storage.
- G. Make periodic backups during the development effort and continually into the future by backing up data to an outboard hard drive, a DVD or a flash drive. Frequency of backing up items under development frequency is determined by tolerance for reentering data. Completed items should be backed up immediately.
- H. Important emails, as determined by the President, Vice President (VP), Secretary and/or Treasurer should be copied to the archivist for the historical file.
- I. Periodic backups should employ the distribution rule of sending one offsite; i.e., safe deposit box, Secretary's home, or a member's fireproof safe (outside of a flood or hurricane zone).
- J. Maintain a journal documenting requests for information and corresponding responses.
- K. At a minimum, the following shall be archived. This is not intended to be an all inclusive list and may be modified. All of the below are to be kept ad infinitum from the original date of this SOP, and as far back as is possible to resurrect.

1. Annual balance sheets and income statements.
2. IRS documentation to include tax status documents and tax return documents.
3. Texas Articles of Incorporation documents.
4. Nevada Articles of Incorporation documents.
5. Colorado Articles of Incorporation documents.
6. Minutes of all Board of Directors meetings.
7. Minutes of General Membership Meetings.
8. SOA Annual BOD Election results and all midterm appointments to the BOD.
9. SOAR After Action Reports.
10. SOAR Pre-Registration Packets.
11. SOA Membership Application forms past and present.
12. SOA Membership Criteria past and present.
13. SOA Fact Sheets, past and current.
 1. Current and Past SOA George C. Morton Memorial Scholarship Program Fact Sheets.
14. Scholarship reports (if not contained within meeting minutes).
15. SOA Operation “Brightlight” Program reports (if not contained within meeting minutes). Names of recipients will not be copied.
16. Any specific membership action taken by the Board of Directors or General Membership for or against any member (e.g., expulsions).
17. SOA By-Laws.
18. SOA Standard Operating Procedures (SOP)

19. Operating Instruction Manuals
20. Artifacts collected over the years by the Association.
21. Copies of all Copyright Licensing Associates, LLC (CLA) contracts and correspondence.
22. Retention of interviews created under the SOA Video History Project.
23. Any other records designated by the SOA BOD to be of archival value.
24. Maintain any books donated to the SOA and record them in a log.
25. Anything of historic importance that may not be covered by the above list.

IV. REMOVAL OF ITEMS FROM SOA ARCHIVES

A. Once an item is logged into the SOA Archives by the Archivist, nothing may be removed from the Las Vegas Storage Unit without Board of Directors (BOD) approval.

B. Items claimed to be the personal property of a claimant will be investigated by the Archivist. Based on the Archivist's report, the BOD will approve or disapprove of removal from the Archives.

C. Researchers who request access to archived items will conduct their examination in the Las Vegas Storage Unit, if at all possible. Removal of an archived item for research purposes will require the specific approval of the BOD.

IV. EFFECTIVE DATE. This annex becomes effective upon approval of the BOD as evidenced by the dated signature of the Vice President.



Michael Taylor
Vice President

Date: November 19, 2020