

Standard Operating Procedure (SOP)

Onboarding New Members – Sons of the American Revolution (SAR)

1. Purpose

This Standard Operating Procedure (SOP) establishes a consistent, transparent, and supportive process for onboarding prospective members into the Sons of the American Revolution (SAR). It ensures that all applicants receive accurate information, appropriate guidance, and timely communication from initial inquiry through full integration into chapter activities.

2. Scope

This procedure applies to all chapter officers, registrars, committee members, and volunteers involved in membership recruitment, application preparation, and new-member engagement. It covers the period from first contact with a prospective member through their first 60 days as an approved member.

3. Roles and Responsibilities

3.1 Chapter Registrar

- Serves as the primary point of contact for application preparation.
- Reviews genealogical documentation for accuracy and completeness.
- Submits applications to the state society registrar and monitors progress.

3.2 Chapter President

- Provides official welcome and introduction at chapter meetings.
- Ensures new members are added to chapter communications and rosters.

3.3 Mentor / Sponsor (if assigned)

- Guides the applicant through genealogical research and SAR expectations.
- Maintains regular communication to support the applicant's progress.
- Assists with outreach, follow-up, and new-member integration activities.

4. Procedure

4.1 Initial Inquiry and Information Sharing

1. Respond to inquiries within five business days.
2. Provide an overview of SAR's mission, membership requirements, and application process.
3. Offer to assign a mentor or registrar to support the applicant.
4. Record the applicant's contact information in the chapter's prospective-member log.

4.2 Eligibility Confirmation

1. Explain the requirement of direct lineal descent from an American Revolutionary patriot.
2. Ask whether the applicant has existing genealogical research or needs assistance.
3. Provide SAR's documentation standards and examples of acceptable records.
4. Determine whether the applicant is likely eligible before proceeding to application preparation.

4.3 Genealogical Research and Documentation

1. Assist the applicant in identifying required birth, marriage, and death records.
2. Provide guidance on obtaining missing documents from archives, vital records offices, or online databases.
3. Review all submitted documents for clarity, consistency, and lineage support.
4. Maintain a secure file for each applicant until the application is approved.

4.4 Application Preparation

1. Work with the applicant to complete the SAR membership application accurately.

2. Ensure each generational link is supported by documentation.
3. Conduct a pre-submission review to verify:
 - o All fields are complete
 - o All documents are attached
 - o Fees are included
4. Obtain required signatures from the applicant and sponsoring members.

4.5 Submission and Tracking

1. Submit the completed application packet and fees to the state society registrar.
2. Log the submission date and provide the applicant with confirmation.
3. Monitor the application's progress and respond promptly to any requests for clarification from state or national reviewers.
4. Update the applicant at least once per month until a decision is issued.

4.6 Approval and Welcome

1. Notify the applicant immediately upon approval by the National Society.
2. Provide a welcome packet containing:
 - o Chapter leadership contact information
 - o Meeting schedule
 - o Volunteer and committee opportunities
 - o Instructions for accessing SAR communications
3. Add the new member to chapter email lists, rosters, and distribution groups.
4. Present the new member at the next chapter meeting and offer an opportunity for brief remarks.

4.7 Orientation and Integration

1. Assign a mentor (if not already assigned) to support the member's first 60 days.
2. Encourage participation in chapter committees, color guard, youth programs, historical preservation, and community outreach.
3. Conduct a follow-up check-in at 30 and 60 days to ensure the member feels welcomed and engaged.
4. Document any feedback to improve future onboarding processes.

5. Records Management

- Maintain digital or physical files for all applicants until their membership is approved.
- Retain approved applications and supporting documents according to state and national SAR guidelines.
- Secure all personal information in compliance with privacy and data-handling standards.

6. Review and Revision

This SOP should be reviewed annually by the chapter leadership or membership committee. Revisions should be approved by the Chapter President and communicated to all officers involved in the onboarding process.