



**Southwest Oral History Association
2020 Procedures Manual**

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Introduction The *2020 SOHA Procedures Manual* represents the understanding of recent and current SOHA Board Members and Committee Members. We undertook this documentation after many years of passing procedures by word-of-mouth, from one generation of volunteers to the next. The purpose of the *Manual* is to facilitate the activities of SOHA and to orient new volunteers. We intend the *Manual* as a living document, which the immediate Past President will update every summer. SOHA welcomes new initiatives and innovations.

Please refer to the [SOHA Constitution & Bylaws 2014](#) for board and member approved articles.

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Governance

Board of Directors — Election and Terms

The Board of Directors consists of the SOHA President, Past President, First-Vice President (Conference Chair), Second Vice-President (Membership Chair), Secretary, Treasurer, four State Representatives, and a Student Representative. The President serves a one-year term, then serves another year on the Board as Past President. The First Vice-President becomes President the next year, unless a majority of the Board of Directors objects and the Nominating Committee (see below) presents new candidates for election at the Annual Business Meeting (see below). All officers serve for one year. The State Representatives are from Arizona, California, New Mexico, and Nevada, serving for two years. All positions are renewable. If a member of the Board resigns, a replacement will be recruited by the Board of Directors to finish the term. New members are given an orientation by the President.

Upon election, Directors read the SOHA Constitution, Bylaws, Procedures Manual, and Timeline. Directors attend three Board Meetings each year and the Annual Business Meeting, barring emergencies. The Summer and Winter Board Meetings are typically located so as to minimize travel expenses and to share the burden of travel among Directors. The Spring Board Meeting and the Business Meeting are held at the SOHA conference. SOHA reimburses Board of Directors members for basic travel expenses for

the Summer and Winter meetings, but not the conference except in exceptional circumstances. Airfares are reimbursed at the rate of two-week advance tickets. Local Directors customarily lodge visiting Directors for the Summer and Winter meetings, when overnight stays are warranted. The Board of Directors may invite a chairperson of a SOHA committee (see below) to attend a Board Meeting, in which case SOHA offers travel expenses as for Directors.

At this time SOHA has no provisions for Directors who are unable to travel, to correspond by e- mail, or to communicate by telephone. SOHA invites practical solutions to these limitations.

An active list of board members with a headshot and bio is listed on the website, <http://www.southwestoralhistory.org/officers.html>.

Nominating Committee

The President recruits a Nominating Committee chair to serve a one-year term. The chair is a Past President, typically the immediate Past President, selected by the Board of Directors at the Spring Board Meeting. The Nominating Committee chair recruits two more members, to make a three- person committee.

In the Summer and Winter newsletters, the Nominating Committee seeks candidates for Board positions that will be vacated at the Annual Business Meeting in the Spring. The Nominating Committee may also seek additional candidates and, indeed, must seek candidates if none come forward. No member of the Nominating Committee member shall be proposed as a candidate. The Nominating Committee regularly confers with the SOHA President on their progress, reporting to the President once a month starting in January.

The President introduces the candidates at the Annual Business Meeting and gives each an opportunity to speak. Members vote on the slate of candidates by show of hands.

Board of Directors — Duties

In addition to specific duties listed below, SOHA Directors assist as needed during Board Meetings and the Conference. For example, it is customary for a Director to host a Board of Directors Meeting in his or her city, and other local Directors often contribute to the lunch. Conference committee members may reasonably request a Director to attend a session with a small audience, count money following the auction, seat late-comers in a nearly full lecture room, substitute for an absent moderator, or join an under-attended tour workshop, if there is no great inconvenience to the Director. Directors seek opportunities to welcome newcomers and develop professional relationships among SOHA members, for example, by dispersing themselves among tables at SOHA conference meals. In the questions-and-answer period following a conference presentation, if other audience members do not come forward,

Directors in attendance initiate the conversation with the presenter.

President

The President holds SOHA to its mission, oversees the business of the organization, preserves valuable SOHA traditions, and proposes or evaluates initiatives to adapt SOHA to professional developments and cultural changes. Inasmuch as the Board of Directors is comprised of volunteers and functions largely as a consensus group, the President always seeks counsel of other Directors for significant decisions. Courtesy and fair-mindedness are paramount in conducting SOHA business. The President's oversight responsibilities include timely review of: the SOHA on-line bank statement, at least quarterly; drafts of minutes of meetings, promptly after submission by the Secretary; newsletter articles, for range and content, prior to publication; the conference program, for scope and balance. The President insures that automobile insurance is held by those who are transporting SOHA members during SOHA events or delegates this to the Conference Chair. The President is also responsible for giving an orientation to new board members. The President is an ex-officio member of all committees, except the Nominating Committee. Unless the President requests to be excluded, copies of all SOHA committee correspondence, including e-mails, are sent to the president. The President may also pass ex-officio status for a particular committee to the First Vice-President in the President's stead.

The President contributes a column to every newsletter, usually officiates at the Awards Banquet, greets conference visitors of note, and sends thank you notes for large donations or favors to SOHA.

Past

President

The immediate Past President serves as an advisor to the President and Vice-President, chairs the Mink Award Committee, and often chairs the Nominating Committee. The Past President contributes a summary of his or her term of office to the Summer Newsletter. At the Summer Board Meeting, the Past President reviews and updates the SOHA Procedures Manual, in consultation with the other Directors. He or she is urged to continue unfinished projects that do not interfere with the prerogatives of new officers.

First Vice-President / Conference

Chair

The annual conference is the primary responsibility of the First Vice-President. (See Annual Conference below.) The First Vice-President also serves as emergency substitute for the President in all duties and as a regular consultant for the President.

Second Vice-President / Membership Chair

The Membership Chair is responsible for maintaining up-to-date records on membership status, and for producing and distributing the annual membership directory. The membership records are kept on the Membership Chair's computer in a Microsoft Word or Excel document, so they can easily be passed on to the next Membership Chair. Significantly updated records are also sent to the President for safe storage at the SOHA electronic back-up site.

In late January or early February, the Membership Chair sends out letters advising members of the expiration of their membership. In both these communications, the Membership Chair inquires whether the member wishes to participate in any of the SOHA committees or activities (listing them by name) *and follows up on any positive responses* within two weeks. Non-paying members are carried for a year before they are dropped from the membership directory. New members are sent a letter of acknowledgement of their membership.

Members receive discounts on the conference registration fee. For institutional memberships, up to four receives the conference member discount. The Membership Chair coordinates with the conference Registrar in membership status. The Graduate Assistant deposits online payments via Square into the checking account which is managed by the Treasurer. They provide the board financial reports.

The Membership Chair compiles the annual Membership Directory. The SOHA Constitution, Bylaws, Past Presidents, Board of Directors, past award winners, and lifetime members are all listed in the Membership Directory. The Chair sends a draft of the directory to least two other members for proofreading. The Chair makes necessary corrections, supervises the printing of the directory, affixes labels, and distributes copies. Most are sent electronically, except to members without e-mail.

At the annual Business Meeting, the Membership Chair advises on any changes in membership dues.

Treasurer

The Treasurer is responsible for the financial aspects of SOHA. He/she is a signer on the on-line bank account (now moved to Wells Fargo) with the President and First Vice President. The bank account is updated when new officers are elected. The new President, First Vice President and Treasurer all go to their closest Wells Fargo branch with minutes, signed by the Secretary, showing their new status. If the newsletter shows their new position, they can take that as well. Each has her/his own login and secret password so that the bank can track who removes or deposits money. Although the Treasurer is normally the

one to write checks and make deposits, the President and First VP are responsible for viewing the on-line account at least quarterly. The treasurer also needs to be added to the investment institution by the President.

The Treasurer prepares a budget, which is discussed and voted on at the Board of Directors' meeting at the beginning of the Fiscal Year. The Fiscal Year was changed to July 1 – June 30 at the April 2007 annual meeting. To facilitate making the budget, the Treasurer will keep Excel spreadsheets that follow the line items of the budget. He/she also prepares quarterly reports for the Board of Directors' meetings.

The Treasurer accepts check requests that are submitted on the approved form showing the line of the budget and board member or Committee chair's agreement along with original receipts. If the treasurer feels there is not sufficient justification, he/she will poll the officers or the board for approval. He/she will then write a check on the on-line bank account. He/she also makes deposits. There is also a travel reimbursement form for board members who have attended out of town board meetings. Other forms may be created to produce good accounting records.

The Treasurer is responsible for overseeing funds collected at registration at the conference and for counting the money raised at the silent auction and the raffle. [The Graduate Assistant will receive the funds at the registration table and track overall conference registration numbers.](#) The Treasurer will accept accounting of conference expenses and receipts from the Conference Chair. Either the President, who was the Conference Chair before the election, or the Treasurer will present a report on the conference finances at the first meeting after the conference.

[An overall conference budget will be maintained year-to-year. See the 2020 Budget here:](#)

https://docs.google.com/spreadsheets/d/1C_03NhX5DJ0cCJhjEQquRjJIApq7zzS9iF0HmXGk5CM/edit?usp=sharing

The Treasurer is also responsible for updating the filing statement with the California Secretary of State biannually before the due date in October. It will be due in October, 2008, 2010, etc. He/she is also responsible for filing annual tax returns by the 15th day of the 5th month after the fiscal year ends (November 15th) both in California with the Franchise Tax Board and with the IRS.

The treasurer changes the address of the organization to the treasurer's address with the IRS Non- Profit Office, the IRS Electronic Federal Tax Payment System, the CA

Secretary of State and the CA Franchise Board. Institutions that write checks to SOHA, for the conference and advertisements, for example, will need an update to the W-9 forms. Recent institutions include Arizona State University, California State University, Fullerton, and Arizona State Library and Archives.

The Treasurer renews liability insurance, due at the end of September.

The Treasurer bills advertisers in the newsletter.

Secretary

In general, the Secretary takes the minutes for regularly scheduled Board Meetings, any emergency Board Meetings by teleconference, and the annual Business Meeting. The Secretary submits the minutes to the Directors for correction, and provides the corrected Minutes for the subsequent meeting. The Secretary holds a supply of SOHA letterhead, printing more as needed, and distributes letterhead to Directors as requested. Thank you notes and miscellaneous correspondence are the responsibility of the Secretary.

A rough chronology of tasks follows: **February and March.** The Secretary is on the alert for requests for letters from the Conference Committee.

April Annual conference and meeting usually take place in April (or late March or early May). The Spring meeting of the Board of Directors is usually held on the Thursday evening before the Friday – Sunday conference. Copies of minutes from the last meeting are distributed to Directors. The Secretary checks on progress on the action items from the prior meeting and reports the outcome in the current minutes. If a majority of the Directors has not voted on the minutes via e-mail, the minutes must be approved at the meeting.

Copies of the minutes from the previous Annual Business Meeting are distributed to SOHA members at the current Business Meeting. The members are given five to ten minutes to read the minutes. Then the minutes are accepted or amended. New Directors are elected at the Annual Business Meeting. Both the outgoing and the incoming (candidate) Secretary take notes and combine their notes to create the minutes of the Business Meeting. The incoming Secretary is responsible for the official version of the minutes. The incoming Secretary sends the minutes to the Directors, within two weeks, if possible. E-mail communications are used for corrections and Board approval of the minutes.

May, June. This period is almost a hiatus for the secretary. The Conference Chair may ask the Secretary's help in sending post-conference thank you notes.

July The first Board Meeting after the election is usually in July, when the new

officers begin their terms. The secretary takes notes and transcribes them to be disseminated to other Board Members by e-mail, hopefully within two weeks. Corrections from the members can come in by e-mail and approval also can take place by e-mail. Action items are specially noted in the minutes, either at the end or in bold type. By e-mail, ask two weeks ahead of the Board Meeting whether Directors need SOHA stationery and distribute the stationery as needed.

August. The Secretary distributes minutes from both the Spring Board Meeting and the Annual Business Meeting to Directors at the Summer Board Meeting, for amendment and approval if not previously approved by e-mail. The Secretary prepares minutes for the Summer Board Meeting and submits them to the Directors for correction and amendment, hopefully within two weeks.

September, October, and December. The Secretary responds to requests from the Directors for special correspondence, such as thank you notes and sympathy cards.

November. This board meeting will be used to go over the conference. Changing the fiscal year means changes to the dates of the board meetings, which are still flexible at this time.

State Delegates/ Representative

The State Representative chairs a local committee to sponsor or co-sponsor at least one local oral history activity, such as a workshop, lecture, tea, or book signing. For outreach, the State Representative contacts local colleges to inquire about oral history programs and research in such departments as History, Anthropology, Ethnic Studies, Women's Studies, and Gerontology; contacts local historical societies and local cultural institutions; requests articles for the SOHA Newsletter on local oral history projects; seeks panel submissions for the SOHA conference; and promotes the SOHA conference.

In addition, the State Representative serves on one SOHA committee. (See below).

Student Representative

This position requires the candidate to be enrolled as a graduate or undergraduate student at a university, college, community college or technical school at the time of appointment to the Board and for at least one of the two academic semesters in which he or she serves on the Board. The candidate must demonstrate prior knowledge of oral history practice. Usually, the Student Representative attends school in the area where the conference will be held.

The primary responsibilities of the Student Representative are advocacy of student

needs at meetings of the Board of Directors and the Annual Business Meeting, recruitment of student members to SOHA, and encouragement of student participation in the annual conference. To these ends, the Student Representative has a nonvoting, advisory position on the Grants-in-Aid and Scholarship Committee and assists the Conference Chair.

The Student Representative contributes a student-oriented column to each issue of the SOHA Newsletter.

For the Student Representative who fulfills the primary responsibilities above, SOHA provides waiver of conference fees.

Native American Representative

This position was introduced in 2017 during a member meeting to include in the SOHA board. The Native American Representative serves as a SOHA liaison with Native American Nations and Communities, encouraging participation of Native American scholars and oral historians in SOHA as well as addressing their specific needs. This representative also assures that SOHA adheres to proper ethics, respect, acknowledgement, and relationship protocol with tribal nations and communities especially in the areas where conferences and meetings are held. As a liaison, this position invites Native American leaders and community members to the conference to participate and helps to organize conference sessions and SOHA events relevant to and focused on Native American oral histories.

Graduate Assistant

UNLV serves as the institutional home of SOHA. We maintain a physical office on campus and are assigned an annual Graduate Assistant who works with the oral history center. The assistant is usually a graduate student in the History Department of the university that works 10 hours per week for SOHA and 10 hours per week with the Oral History Research Center based on an arrangement with the University of Nevada, Las Vegas.

Finances

The fiscal year runs from July 1 through June 30. Requests for funding are submitted to the Treasurer on the SOHA Check Request Form, accompanied by original invoices. The form may be submitted by e-mail first and followed up by invoices. The Treasurer is responsible for contacting (by telephone or e-mail) the SOHA officers within two business days to obtain approval for unbudgeted amounts over \$250.

SOHA officers and committee members shall not advance more than \$250 in

personal funds or guarantee such payments without prior approval from the Board of Directors.

Bank signing authority. The Treasurer is to be the only signer when he/she is able to do it. However, the President and First Vice President may sign if the Treasurer is unable to. The President and First Vice-President have access to the on-line banking account, for oversight. The President and First Vice-President each review the on-line bank statement at least once a quarter.

Out-of-pocket expenses. SOHA Directors and committee members ordinarily cover small out-of-pocket expenses, such as bills for SOHA telephone calls, postage for a few letters, occasional office supplies, copies of documents for Board Meetings, and small gifts, lunch for Board Meetings, for a total contribution of under \$100 for the year. (The Treasurer cannot reasonably monitor and recompense many small expenditures.) SOHA reimburses modest travel expenses for the Summer and Winter Board of Directors Meetings and special project costs when necessary. Directors on limited budgets may report burdensome out-of-pocket expenses to the President, in consultation with the Treasurer, for probable compensation.

Credit Card: The Board of Directors discussed the pros and cons of having a credit card at the Nov. 8, 2008 board meeting. While it would be convenient to have a credit card for the conference hotel and some other occasions, there was a concern about inappropriate use of a line of credit. The board voted not to have a credit card. However, a debit card comes with the Wells Fargo on-line banking and it can be used by the treasurer when necessary.

Clerical Assistance

There is a budgeted amount for clerical assistance, primarily for conference help. The President may also authorize other clerical assistance.

Communications

E-mail: The subject line in all e-mail correspondence begins with "SOHA" to facilitate identification and/or filing. In e-mail exchanges, when the topic of correspondence changes, the subject line changes to indicate the contents. All committees copy all e-mail correspondence to the President unless the President requests exclusion. Conference Committee members copy all e-mail correspondence to the Conference Chair unless the Chair requests exclusion. Members of the same committee copy committee correspondence to all committee members unless they request exclusion.

Post: SOHA officers keep on hand a small stock of SOHA stationery for formal letters and thank you notes. The secretary re-supplies the officers and provides SOHA stationery

to committee members for committee business upon request.

Telephone: The President and First Vice-President may request a telephone conference call for an emergency decision by the Board of Directors.

[Awards, Grants, and Scholarships](#)

Presentation of Awards

Most awards are presented at a conference Awards Ceremony, typically after a meal whose price is included in the conference registration or during a plenary session. History Day Awards are typically presented at local ceremonies. The Conference Committee may include the local winner of the History Day Award in the conferences Awards Ceremony.

[Mink Award](#)

The Mink Award is named for James V. Mink, an early oral history pioneer. It recognizes an important body of oral history work done in or about the Southwest.

The Past President is Chair of the Mink Award Committee. The Chair recruits two other members, and they seek an oral historian worthy of the honor who is not a previous recipient. In the Summer or Winter newsletters, SOHA members are invited to nominate a Mink Awardee.

The Chair notifies the winner by December or January and invites the winner to the next conference. The winner's registration fee is waived and, if there is financial hardship, SOHA funds may be allocated to defray travel expenses.

SOHA presents the winner with an [engraved award](#), previously a certificate, of the Mink Award and the same token gift presented to the Service Award recipient. These items are expensed by the SOHA office.

Service Award

The Service Award is given for long-term or extraordinary service to SOHA. Often it is given to a Past President. Normally, up to three SOHA members may receive the Service Award. Current members of the Board of Directors are excluded. Past recipients are listed in the back of the membership directory. After an interval of three years, a past recipient may again receive a Service Award.

The President recruits a Service Award Chair. The Chair may choose two additional committee members or request the President to recruit them. The Service Awards Chair

contacts and seeks recommendations from Directors and others active in the organization over a period of time.

The Chair notifies the winner(s) ahead of time, in hopes they will be present at the conference. At the Conference Awards Ceremony the winner receives a certificate and a gift chosen by the Chair.

K-12 Teacher Classroom Achievement in Oral History

These annual awards will honor the individuals and/or projects in the states of Arizona, California, Nevada and New Mexico that best represent the exemplary use of oral history as an educational methodology at elementary and secondary levels. Two outstanding educators/projects will be picked for special recognition for outstanding achievement: one from the elementary level (K-6) and one from secondary (7-12). Winners will receive: An honorific award - SOHA Oral History Educator of the Year (Elementary or Secondary), one year complimentary membership in SOHA, an invitation to the annual SOHA meeting (registration fee waived), and an invitation to present the project/program at the annual meeting. Teachers attending the conference will receive certificates of professional development hours for recertification for all sessions attended. The Scholarships and Awards Committee will decide on nominations and recipients. The President selects a chair of this committee, and then the chair recruits two or three members of the committee to serve for the year.

National History Day Awards

Every state in the SOHA region has a National History Day program for middle and high school students. This program is independent of SOHA or any other oral history group, but SOHA rewards these youths' accomplishments with a \$100 prize for best use of oral history in a National History Day project. The award is given to one individual or group project in each of the four SOHA states.

It is the duty of the State Representatives to contact the State Coordinator of National History Day in their state. They pledge to sponsor the \$100.00 award and make arrangements with the Coordinator to send payment.

The selection of the winner is done at the state competition by a special award judge. The winners are announced at the awards ceremony following the competition. The State Representative should contact the National History Day Coordinator within a month to gather information on the winning student. The State Representative then writes a short article about the winner in his/her state to be published in the next issue of the SOHA newsletter.

Institutional Home

The University of Nevada, Las Vegas has been SOHA's institutional home since 2013 based on a Memorandum of Understanding between the organization and the university. In effect for four years, it was renewed in 2017. The next renewal process is in 2021. Funding for the organization typically is provided via a stipend for the Graduate Assistant from UNLV Libraries; office space in the History Department and some support with printing as requested; and an annual grant from a donor to the College of Liberal Arts. An Annual Report on SOHA's activities is due in June of each year. Written by the current President, it is sent to the Dean of UNLV Libraries, the Dean of the College of Liberal Arts, and the Chair of the History Department. We receive support from the Department of History. They have often covered our costs of the program printing when the request is made in advance by Past-President, Caryll Dziedziak, caryll.dziedziak@unlv.edu.

SOHA Grants

We receive outside funding to support our organization. This has included the HL Boyer Fund. Additional funding, in 2020 for example, was requested and secured by conference co-chair Ryan Morini ryan.s.morini@gmail.com. This requires an overall conference budget and an outline of the program asking for support. We requested support for our Native American artists.

Award, Grants, and Scholarships

SOHA Directors and Committee Chairs are *not* eligible for grants or scholarships. By majority vote of the Officers and Past President, exceptions may be made for conference scholarships for the Student Representative and State Representatives. The same recipients are not eligible to win grants or scholarships two years in a row. The names of the winners will be placed on the website so they are available to the scholarships committees.

Scholarships & Grants

We typically distribute \$3,300 in awards based on past-president and treasurer's historical information.

For several years, the Ak-Chin Indian Community has supported Native American scholars. Our organization submits a donation letter in winter, which has been prepared by Past-President Sarah Moorhead. Sarah Moorhead, sarahemoorhead@fastmail.fm, in recent years requested \$2,000. These funds were created by money two people had

donated to bring Mrs. Watt to the OHA conference, then the SOHA conference. When she was not well enough to come, they asked to bring Native Americans to our conference.

The Graduate Assistant receives the award applications via email or mail. They create a cloud based folder for the awards with either Dropbox/GoogleDrive. They then notify the awards committee that all submissions have been received by the given deadline. The Committee Chair determines the review period and notification date. They work with the Treasurer to issue checks and notify the awardees based on a committee determined deadline. The Graduate Assistant registers and confirms those who receive complimentary registration as part of the award.

In 2020, the Scholarship and Awards Committee Chair was Summer Cherland with the following Committee members: Caryll Batt Dziedziak, Marcia Gallo, Monserrath Hernandez, Sara Long, Cindy Keil, Kristine Navarro-McElhaney.

Eva Tulene Watt Scholarship for Native American Scholars:

Named in honor of Apache author and oral historian Eva Tulene Watt, who shared the story of her family and her people's past through recounted events, biographical sketches, and cultural descriptions (*Don't Let the Sun Step Over You: A White Mountain Apache Family Life, 1860-1975*, with Keith Basso, University of Arizona, 2004), this SOHA scholarship enables indigenous oral history practitioners to attend and participate in the Annual SOHA Conference. As part of the award, the SOHA conference registration fee is waived and travel and hotel expenses are reimbursed up to an amount of \$500. Recipients are not eligible for the Eva Tulene Watt scholarship two years in a row. A one-year SOHA membership will be included in the scholarship award. [2020 Application](#)

General Scholarship:

SOHA awards two General Scholarships to oral historians and practitioners to attend and participate in the Annual SOHA Conference. Students, teachers, independent oral historians and individuals associated with nonprofit organizations in the general SOHA region are encouraged to apply. Funding includes one cash award of \$300 per recipient and should be applied toward travel and hotel expenses. The SOHA conference registration fee is waived. Recipients are not eligible for the General Scholarship two years in a row. A one-year SOHA membership will be included in the scholarship award. [2020 Application](#)

Mini-Grants

SOHA awards up to three mini-grants each year totaling up to \$1500. Funds may be used for interviewing, equipment, transcription, editing, publishing, and other oral history related expenses. Students, teachers, and independent researchers, historical societies, archives, museums, and non-profits in the general SOHA region are encouraged to apply to conduct research on the Southwest. Recipients may be invited to present their work at a SOHA conference within two years of receiving the Award. We also ask that recipients prepare a written report on their work for inclusion in SOHA's newsletter within six months of receiving the award. [2020 Application](#)

THE SAME RECIPIENTS OF SCHOLARSHIPS CANNOT BE AWARDED TWO YEARS IN A ROW

Emergency Program Scholarships

Some presidents have chosen to bring participants to the conference, who otherwise would not have the financial resources. This is frequently discovered after the general scholarships have been allocated. This can come from the President's discretionary fund.

SOHA News and Publicity

Newslett er

The SOHA Newsletter is published three times a year. The Winter issue is distributed in October or November; the Spring issue in March; and the Summer issue in June or July. Newsletters are distributed to all members electronically who have given their e-mail addresses. Others receive it by postal service. The basic newsletter team consists of the editor, the graphic designer, review editor and the producer. Four Regional Reporters, various members of the Board of Directors, and SOHA committee chairs are also responsible for contributions at various times.

The **Editor** solicits and edits articles by requesting them from likely SOHA members and sending a reminder request to the President to e-mail the board and members to send in articles. Members are particularly solicited for announcements of books and events on oral history. The editor sends the complete collection to the President for review and proofreading.

The **graphic designer** is responsible for the layout of the newsletter. The formatter receives a free membership in thanks for his or her work. This may become a paid position.

Production: Claytee White and Joyce Marshall Moore at University of Nevada Las Vegas have volunteered to print newsletters and directories on two-sided, colored paper for members who do not have e-mail. UNLV will also mail the newsletters.

The four **Regional Reporters**, one from each SOHA state, contribute feature articles on state projects and compile announcements.

Customary content categories
follow:

Every Issue SOHA mission statement Membership form SOHA web site address President's column Newsletter due dates and contact information Editorial, layout, and production credits Listings (Board of Directors list, Committee Chair and newsletter list) Call for articles Book announcements and reviews Website reviews Welcome to new members Meet the Board of Directors biographical statements (until all are introduced) General articles Article by Conference Program Chair, either about the past or upcoming conference. Block advertisements

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Winter Issue Promotion of annual conference (call for papers/presentations, info about the site, hotel reservations)
Mini-grant winners
Regional news articles

Spring Issue Promotion of SOHA annual conference Call for raffle/silent auction items Nominating committee call for positions Mink Award committee call for nominations Announcement of mini-grant award winners (if selected)

Summer Issue Call for papers/presentations Report on SOHA annual meeting/conference Thank you to auction donors Mink awardee speech

SOHA Website

The website coordinator is an hourly, paid position. The coordinator designs the website, subject to approval by the Board of Directors, and updates the website at least once per quarter.

As of 2020, Linda Ittenbach, ittenbach@gmail.com, receives site request updates via

email. She logs her hours and submits to the Treasurer.

Social Media

We established a blog and social media accounts ([Instagram](#) | [Facebook](#) | [Twitter](#) | [Pinterest](#)) with @sworalhistory. We create #SOHA2020 and other years to create a digital archive. We use this media in our newsletter.

Annual Conference

Conference

Overview

Date and location of conference. Traditionally the conference is held in the period from late March to early May. When possible, the conference dates are chosen so as not to overlap with conference dates of related associations, Easter, or Passover. (Members with other religious observances in the Spring are invited to notify the SOHA First Vice-President.) Traditionally, the conference location alternates between Southern California, where the majority of members reside, and the other three SOHA states, rotating among Arizona, New Mexico, and Nevada. However, special occasions and the availability of conference sites may also influence the choice.

Outline of conference schedule. The conference usually runs through a weekend from Friday morning to midday on Sunday. Here is a typical schedule:

Thursday after dinner: Board of Directors Meeting
Friday morning and afternoon: workshops and tours
Friday evening: reception and possibly a special event
Friday afternoon and Saturday: raffle and auction
Saturday morning and afternoon: panel and roundtable presentations
Saturday luncheon or dinner: Awards Ceremony
Sunday morning, 8:00 a.m. - 9:00 a.m., Annual Business Meeting (often after a continental or full breakfast)
Sunday morning later: panel presentations
Sunday afternoon: adjourn, or possibly a special event

Size of conference: approximately 80-100 conference attendees who pay either full or all day Sat. registration fees.

Conference

Committee

The First Vice-President is the Chair of the Conference Committee, unless opposed by

the majority of the Board of Directors. In that case, the Board of Directors must recruit, and approve by majority vote, a Conference Committee Chair. The Chair recruits other members to serve on the Committee, seeking diversity insofar as possible. If volunteers come forward, their information is forwarded to the Chair. The period of service is limited to the year leading up to the conference. The Conference Committee consists of: First Vice-President/**Conference Chair, Local Arrangements Chair, Program Chair** (for Panels, Workshops and Tours), **Auction and Raffle Chair, Student Representative** (position held by a local student), **and Registrar**. The Program Chair assembles a Program Committee. Conference Committee members may work on more than one conference committee. The Student Representative duties may encompass a variety of tasks according to the desires of the committee and student. A different student is often a member of the Program Committee. This student may make suggestions, give advice, plan sessions or events, or perform duties on an as-needed basis. For coordination of the various conference activities, the Conference Chair should be copied on all e-mail communications concerning the conference.

The Program Committee stays in close communication with the First Vice-President/Conference Chair. The First Vice-President/Conference Chair telephones the President at least once a month and forwards to the President significant e-mail messages.

The President may assign the Conference Chair to ascertain that volunteers who drive SOHA members at the conference have automobile insurance, to fulfill the requirement of SOHA's liability insurance.

The Program Chair/Co-Chairs create a committee of members who create a Call for Proposals (2020 [Call for Proposals](#)), review submissions, and notify presenters. The GA may assist in receiving the proposals and create a Dropbox/GoogleDrive or the chair may assign an email to collect all proposal materials such as soha2020conf@gmail.com. Applications were notified by January 6, 2020. They meet regularly to create a draft program. See the 2020 draft here:

<http://www.southwestoralhistory.org/SOHA%202020%20Program%20Draft.pdf>

Committee meetings have been held with Zoom video conferencing and distributed to the members with an agenda.

Site Selection and Local Arrangements

The Conference Chair oversees the Local Arrangements Committee (often with the identical people as the Program Committee). Members serve for one year; the committees are dissolved after the conference. Local arrangements include negotiating hotel and meeting room rates, setting up tours and the reception, choosing menus, and scouting

ground transportation from nearby airports.

Site. The Board of Directors chooses a city and state for the conference. Because the majority of SOHA members live in California, the conference has traditionally been held in Southern California every other year, and, in alternate years, the site rotates among Arizona, Nevada and New Mexico. However, site availability and special occasions may affect this schedule. It may help in recruiting members from other states to increase the number of conferences in their states, as well.

The Local Arrangements Committee proposes specific dates, local conference sites, and hotel accommodations for approval by the Board of Directors. When the First Vice-President/Conference Chair resides outside of the conference area, the initiative lies almost entirely with the Site Committee. In such cases, the Local Arrangements Committee communicates frequently with the First Vice-President/Conference Chair, who relays the information to the Board of Directors.

A conference hotel is chosen based on cost (\$85 in 2010 in Nevada, \$170 in LA in 2009, \$175 in 2020 in Las Vegas), quality of sleeping rooms, grounds, facilities for sessions, accessibility, activities around the site, location for reception, airport and public transportation, and parking fees at the hotel. An affordable historic hotel is desirable, or a hotel close to a historical society, university, or other venue where the conference events take place. Accessibility for the handicapped should also be strongly considered. SOHA provides a roommate service through advanced conference registration.

Meals and snacks. Hotels often require a hefty minimum catering budget as part of the conference deal. The Local Arrangements Committee weighs this as part of the total conference budget, including registration fees for conference attendees.

The Awards Banquet may be held at lunch or dinner, but lunch is much less expensive. In the past, the Awards Banquet has been included in the registration, but this decision is examined every year based on cost. The awards may also be given at a special breakfast.

Discussion-topic tables may be established and led by oral history experts either as a special event or at the banquet. For example, Mink awardees may talk about their work, joined by table members who want to discuss that area. At a minimum, members of the Board of Directors sit at different tables to provide a welcoming touch and mix with the members at the awards luncheon.

SOHA used to provide regular and decaffeinated coffee, snacks for mid-morning breaks between workshops, and sometimes snacks on Saturday. A continental breakfast or full breakfast has usually been offered on Sunday morning. Costs continue to be an issue, so in 2008 snacks were not served, although beverages were, on Friday and Saturday morning.

If the conference is held on a university campus, the policy may state that campus approved catering is only available. Ask about alcohol policy and financial liability to use the facilities. Claytee White, Past-President, negotiated the use of the UNLV Lied Libraries as our host site for the 2020 meeting for March 27-29, 2020 at no cost to SOHA (but this was postponed due to the COVID-19 pandemic).

Conference Budget and Financial Procedures

The Conference Committee submits a preliminary budget at the summer meeting of the Board of Directors and a final budget at the winter meeting. In 2008, a realistic estimate of conference income presumed 80 attendees paying an average of \$95 each. This averages some students, some Saturday- only registrations, some full conference registrations and workshop fees. Registration fees have stayed at \$95 for several years.

Expense reimbursement requests. Any expenditure over \$250 must be approved in advance by the officers. Therefore, all annual meeting expenses over \$250, including publicity, site fees, room rentals, equipment rentals, meals & refreshments, and speaker/performer honoraria, must be submitted to the Board of Directors for prior approval. Neither the Chair of the Conference Committee nor any member may obligate the association to any expenses over \$250 without prior approval from the Board of Directors. This may be done in the form of an approved budget.

Expense requests are submitted in writing on the SOHA Check Request Form to the Treasurer and are accompanied by original invoices. For expediency, the form may be sent first by e-mail, and then the hard copy and accompanying invoices posted by mail or Federal Express. The Treasurer shall contact the Board of Directors by the most efficient means available to obtain approval and relay the committee's decision to the chair for non-budgeted items. To the extent practicable, expense requests are submitted by the Chair. Any other Conference Committee member submitting an expense request shall simultaneously send a copy to the Chair.

Registration fees for the conference and related workshops, programs, tours, and events shall be approved by the Board of Directors before the registration form is published and distributed.

Before ordering **promotional items**, such as totes, banners, and table favors, the Conference Committee considers the value of these items in promoting the mission of SOHA. For example, their cost may be weighed against scholarships for additional attendees.

The purpose of these procedures and recommendations is to support the work of the

Conference Committee and to guarantee that the association's funds are handled in a responsible and open manner.

Conference Program

Board and committee recruitment from prospective board members to serve as chairs and committees outlined below. Committee members should be active members of SOHA. Ask [Past-presidents](#) who are previous conference chairs for guidance and recommendations. Create an [annual conference planning document](#) and break each committee into separate planning documents with assigned chairs to check in with committee members.

Recruitment of conference presenters. The Program Chair announces the call for papers/presentations/proposals on the SOHA website, on the Oral History Association listserv (H-Net), and website, in the SOHA Newsletter, in letters sent to the SOHA membership list, and in notices to history and anthropology departments. To fulfill SOHA's mission, the Program Committee may also recruit presentations from the less populated SOHA states of New Mexico and Nevada, from among journalists, teachers, or playwrights working from interview material, who would not ordinarily present at an oral history conference; from underrepresented ethnic, racial, or socioeconomic groups; and from Native American groups because of their indigenous tradition of oral history.

Notification of presenters. The Program Committee makes decisions on which proposals have been chosen by Thanksgiving and notifies applicants within a week – 10 days after that. Program presenters are requested to attend the entire program, or at the very least one entire day. In this way presenters remain available to conference attendees, show courtesy to fellow presenters, and develop the oral history community. Closer to the conference, the Program Committee assigns to each presenter a time slot, and the Program Chair notifies presenters at least one month prior to the conference. (Usually there is some filling of gaps before the program is complete.) This can be done by e-mail, but participants must confirm receiving the e-mail. If they do not confirm, the Program Committee must follow up with telephone calls to make sure the information was received.

Moderators. If a group submits a panel proposal, they often suggest a moderator. If not, Program Committee recruits a moderator—one with some expertise on the subject, if possible. This requires thoughtful overview on the part of the Program Committee and knowledge of experts in various oral history areas. Past Presidents and past Mink Award recipients are often suitable as moderators. The duties of the moderator need to be explained both to the presenters and the moderator and the definition goes on the website. The moderator is not a commentator – that is, does not read papers or comment on them before the conference. He/she introduces the presenters, keeps the panel to prearranged time, and may make brief comments at the end to weave the themes together. The moderator may also be prepared with one question for each presenter. It has been proposed

to change the name of moderator to “chair”. An explanation of the duties should be on the website in either case. The Program Chair may want to use the website as much as possible to give directions and communicate with presenters and moderators.

Many oral historians cannot obtain institutional funding to attend the conference unless they participate. Moderating a panel suffices, so careful distribution of the moderator positions enables more people to attend. Also, the prestige of moderators brings registrants who respect their level of critical thinking.

The Program Chair sends by e-mail copies of panel submissions and participant contact information to the moderators and copies the presenters so they all have their contact information. Ideally, the moderators receive copies of the paper presentations a week before the conference, but in SOHA this may or may not happen. **The presenters and moderators need to be informed that they need to pay registration fees, even if they are invited to speak.**

It is SOHA tradition to not give the academic degrees of the panelists in the program. An exception is made for the workshop presenters and keynote speaker.

President’s session. The SOHA president may choose to organize a special session, according to his or her interests. If so, the Program Committee assigns a time slot for this session.

Workshops run from two to seven hours. The Program Committee decides which workshops to offer and recruits leaders. SOHA offers an introductory workshop and two or three full or half-day advanced workshops. Two half-day introductory workshops are also an option. Sometimes there is a Saturday morning workshop for teachers, which is included in their registration fee. All day workshop leaders are offered an honorarium (\$150 in 2009), (half day, \$100), but often they choose to support SOHA by declining payment.

Tours. If interesting sites are nearby and logistics prove favorable, the Program Committee and Site Committee together choose arrange tours. The profitability of tours varies greatly, and sometimes they lose money. So tours are offered at the conference committee’s discretion.

Scheduling of sessions. Sessions usually run ninety minutes. Panels on similar topics are spread throughout the conference schedule instead of opposing each other in the same time period. Efficient use of expensive equipment required by some presenters may also dictate schedule. In 2008 two person sessions ran 60 minutes.

The conference may well begin and end with plenary sessions on provocative topics that stimulate discourse and networking. Scheduling many presenters for Sunday helps keep attendees at the conference to the end. Consult with the previous Conference Chair about costs and benefits of scheduling various numbers of simultaneous sessions. Consult the facilities contract to be sure times match.

Silent Auction and Raffle

Funds raised at the silent auction and raffle are dedicated to scholarships and mini-grants, as disbursed by the Grants-in-Aid and Scholarships Committee.

The Auction and Raffle Chair

Requests donations from SOHA members in February newsletter
Seeks through the Local Arrangements Committee an address to which donations can be sent in advance of the conference
Requests donations from businesses at least six weeks before conference
Recruits volunteers/committee members to sell raffle tickets and staff tables between sessions
Sets up tables on the morning of the auction and raffle
Collects money from high bidders and counts it with the treasurer or other SOHA board member
Writes thank you letters to donors after auction

The Auction and Raffle Chair might request donations from local restaurants or museums for meals or tickets that raffle winners can redeem while in the conference city.

Brown paper lunch bags or boxes can be used to hold raffle tickets for each item. The bag is numbered, and the same number is written on a slip of paper that describes the item and the donor. Each donor puts his or her name on the back of each paper describing the item and his or her address on one, so a thank you note can be written.

The auction and raffle close Saturday after the last afternoon session, before the evening event. The Auction and Raffle Chair collects money then. If the high bidder has left already, and failed to arrange for someone else to pay and take the prize, the second highest bidder wins and pays for the item. Consult contract with facilities to be sure times match.

Money is collected at a separate table, ideally with one person for the raffle and two for the auction. The raffle money is kept separate from the auction money, to minimize confusion. If no other change is available, bills may be taken out of the raffle money, but a note of the amount must be deposited with the raffle money. The Treasurer and another SOHA Director count the money at the end of each day. The money is then passed to the Treasurer as soon as practicable.

Items that nobody bids on are returned to the donor. Donors must return before conference is over to pick them up. Items are not mailed due to the cost and time involved in mailing them. If not wanted by the donors and not sold, they may be kept for the following

year's auction.

The Auction and Raffle Director writes a thank you letter to each donor of a raffle and silent auction item. Often one person gives several items, so there are many fewer letters than items.

Although a personal note is nice, a form letter is adequate. Donors can use the letters as evidence of their donations for tax purposes, as SOHA is a 501© 3 nonprofit corporation.

The Auction and Raffle Chair may call upon SOHA officers and other members for assistance.

Conference Publicity and Registration

The conference is promoted through the web, program mailings, newsletter, and listservs. Ideally, press releases are sent out to local newspapers. On-line, mail-in, and on-site registration payments are supervised by the Treasurer.

The Program Chair is responsible for the program layout, printing, and mailing to registrants. At least twenty programs are sent out to each major oral history program in the SOHA region. The program is also posted on the SOHA website. Any changes in schedule between the preliminary mailing and the conference are made in a finalized version of the program, which is included in registration packets at the conference. A participant list is also included in the packet.

The Conference Committee may choose conference colors, depending on the state and theme of conference. The hard-copy call for proposals/papers and the program are printed in the same color. Cover art is often based on the conference location utilizing archival materials and/or a custom design from a regional artist.

Registration. The Treasurer sets up registration tables in coordination with the Conference Chair. Two clerks staff the registration table at all times—one handling the money, the other distributing registration packets. The Second Vice-President/Membership Chair provides a current membership list, so that registration clerks can check membership status when they collect registrants' fees. Often the registration fee is reduced for members to equal the price of a membership. If attendees register as non-members, they should be encouraged to become members. The Treasurer provides a list of those who need to pay additional registration fees and includes a copy of the registration form in the packet for attendees to use as a receipt. Money paid at the registration table should be marked on the forms as cash or check. Our organization has used Eventbrite and Square to process CC payments. These systems offer advance registration options. See <https://squareup.com/store/southwest-oral-history-association> for current information.

Attendees may pay SOHA membership fees on-site and register as members. New

members may be given name tabs that identify them so SOHA members make them feel welcome.

Options. These are recommended procedures. There is discretion involved. If the Program Chair and/or Conference Chair wish/wishes to make major changes, first the Conference Chair should be consulted, then the President notified of the reasons, as a courtesy. For example, in 2008 the Program Chair felt strongly that moderators should be able to have their registration fees waived, if they only attended their sessions, so this was done.

CONFERENCE TIMELINE

18 months-1 yr. Prior to
conference

Select Program Chair and Local Arrangements
committee Select site

9 months prior to
conference

Send out Call for
Papers/Proposals/Presentations Mid-Late October
Program committee meets to decide on workshops,
reception, etc. Nov. 1-7

Proposals due (may be sent either e-mail or
hard copy) Before Thanksgiving

Decisions made on which presentations
are accepted First week to 10 days in December

All potential presenter s
notified

Look for other presenters to fill in
program Early January
Finish contacting others to fill in program Create list
of institutions to receive printed program Mid to end
of January
Type and format preliminary program, registration form
Print preliminary program, put on website Silent

auction/raffle items requested Mid Jan to Feb. 1
Send out preliminary program and registration form
Set up on-line payment system Feb.1

Mink and Service award committees meet to
select winners 6 weeks prior to conference

Set menus with facilities, table set-up, registration
desk etc. 2.5 –3 weeks prior to conference

Advanced price for registration (postmark due date)

Schedule registration desk coverage Obtain award
certificates and gifts 10 days before conference

Take final program to
printer 1 week before conference

Late fee for registration (received date) Membership chair creates list of
current members for registration desk Type participant list Assemble folders
with participant list, final program, maps, etc. for attendees 2 days before
conference

Assemble box with registration table supplies: extra paper, pencils, pens, check-in lists,
membership forms, registration forms, etc., luncheon program Assemble folders
alphabetically by name of conference attendees in box or boxes: include registration form
as receipt, map or maps of meeting rooms and events, final program, list of restaurants
and sights, nametag and holder, etc. Obtain checks for award winners Obtain change for
registration desk, silent auction and raffle Prepare list of those who have paid up for
workshops to give to workshop presenters. Devise method to ensure everyone who
attends workshops has paid. At conference

Place awards luncheon program at tables Remove evaluation forms
before hotel discards them Be prepared for the hotel to have you
sign invoices right after the meals, etc.

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The SOHA Procedures Manual was prepared by Teresa Bergen on January 3, 2007 under  
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Arrigo and Sarah Moorhead during the June 3, 2010 revision. It was formatted by Emilee  
Hunter. Input for the manual was additionally provided by Karen Harper, Sherna Gluck, Tracy  
Smith Falk, Joyce Marshall, Mary Melcher, Melanie Sturgeon, Claytee White, Ruth Levor,  
and Susan Uyemura.

It was revised by executive board members Jennifer Keil, Farina King, and Summer Cherland starting on March 4, 2020 to be reviewed and voted on by board members on the March 27, 2020 board meeting.