



**California Society Sons of the American Revolution**

**State and Chapter Officer Handbook**

**January 1, 2026**

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## **INTRODUCTION**

This Handbook was developed to be a convenient high-level guide for state and chapter officers and committee chairs of the California Society Sons of the American Revolution (hereinafter referred to as CASSAR). Discussions have been held over several years with many CASSAR compatriots, other state societies and past General Officers to help identify the needs of state/chapter officers and Compatriots.

The chapters within the CASSAR, while functioning under the Constitution and Bylaws of the National and State Society, are very diverse – due to size, location, membership and interests that vary among chapters in California. Large chapters may require seven or more officers and committee chairs, while small ones may only need three or four. Participation in activities will also vary, depending on the size and interests of the chapter members. Nonetheless, they all exist to support the mission and goals of the National Society.

In order for this resource to be useful, all officers, committee chairs and Compatriots of the CASSAR should be made aware of its existence. While this is intended as a general high-level discussion, any Compatriots wishing to assume leadership positions in the SAR at the chapter, State or National levels are encouraged to become familiar with the National Handbook, which can be found at <https://www.sar.org/nssar-handbook/>. The National Handbook (currently at 8 volumes) is updated periodically, so it is recommended that the reader check the Handbook occasionally to ensure the latest information is used.

Because of the volume of information available and periodic changes being made to rules, regulations and bylaws, it is not possible to include all information in detail in this document. Links are provided where appropriate to allow viewing or downloading of the most recent information from active web pages. The latest information will reside on the CASSAR web page at [www.CaliforniaSAR.org](http://www.CaliforniaSAR.org) or on the NSSAR web page at [www.sar.org](http://www.sar.org), so the reader of this handbook is encouraged to check the referenced websites for the latest revision of the document rather than relying on a potentially outdated copy of this manual. Much of the information contained herein is copied directly from the source documents, but this manual serves to pull all information into one document.

The California Society's newsletter (the *California Compatriot*) is also a valuable tool for keeping abreast of current events as is the *SAR Magazine*. The *California Compatriot* is posted online at <https://www.californiasar.org/compatriot/>, while the *SAR Magazine* is mailed to Compatriots via US Mail; past issues of the *SAR Magazine* and *California Compatriot* are also available online. Many chapter newsletters can also be found online on chapter web pages.

**All chapters and State societies are encouraged to use the various social media platforms that are available. Given that, it is expected that ANY social media sites used by chapters and State societies be maintained to ensure the latest information is always available.**

Those individuals wishing to advance to leadership positions within the chapter or State Society should also become familiar with the California Attorney General's Guide for Charities, especially those sections addressing officer/director responsibilities. Refer to [Attorney General's Guide for Charities \(ca.gov\)](http://Attorney%20General's%20Guide%20for%20Charities%20(ca.gov)). Failure to abide by these requirements CAN result in revocation of the

organization's tax-exempt status and/or subject the officers and directors to additional penalties. In addition, training modules have been developed and added to the SAR web page; all members are encouraged to avail themselves of the training within SAR University.

Compatriots are reminded that the SAR is a non-partisan organization. State Societies and Chapters must never endorse or recommend any candidate for public office, nor may meetings include the discussion of merits or demerits of such candidates. See Vol 3 of the NSSAR Handbook for additional information.

All Compatriots are expected to comply with applicable federal, state, and local laws and regulations and with NSSAR and CASSAR bylaws and policies, including those dealing with ethics or conduct. These updated disciplinary procedures have been developed and approved at the National and State Society levels and have been incorporated into the CASSAR bylaws. Also remember that the SAR is a society of gentlemen. It is expected that ALL compatriots and members of the Society act in a gentlemanly manner, both within the Society and to groups and individuals not part of the Society.

It should be recognized that the work done on this project could not have been accomplished had it not been for the contributions of and proofreading by many compatriots – too many to acknowledge individually. I extend my thanks to you.

Your comments and suggestions are appreciated and will serve to enhance the communications among all California compatriots.

***Derek J. Brown, PE***

*Chair, Membership Committee NSSAR (2021-2025)*

*Vice-Chair, Genealogy Committee NSSAR (2024-2025)*

*Vice-Chair GWEF Fundraising Committee (West) NSSAR*

*Vice-President General International District 2023-2024 Vice-President General Western District 2022-2023*

*Past President CASSAR 2018-2019 Trustee (CA) NSSAR 2019-2021*

*Trustee (Int'l Society) NSSAR 2024-2025*

*Registrar, Thomas Jefferson Chapter CASSAR*



## **HISTORY OF THE NSSAR**

The Sons of the American Revolution was incorporated in Connecticut on January 17, 1890 and later chartered by the United States Congress on June 6, 1906. Prior to 1890 a number of state societies were formed. These were led by the Sons of Revolutionary Sires, which was organized July 4, 1876 in San Francisco, California. Acting on a resolution by the New Jersey Society, delegates from thirteen state societies met at Fraunces Tavern in New York City on April 30, 1889 in celebration of the one hundredth anniversary of the inauguration of George Washington. It was on this date that the National Society of the Sons of the American Revolution was organized.

There are currently about 590 chapters spread throughout the world.

## **HISTORY OF THE CASSAR**

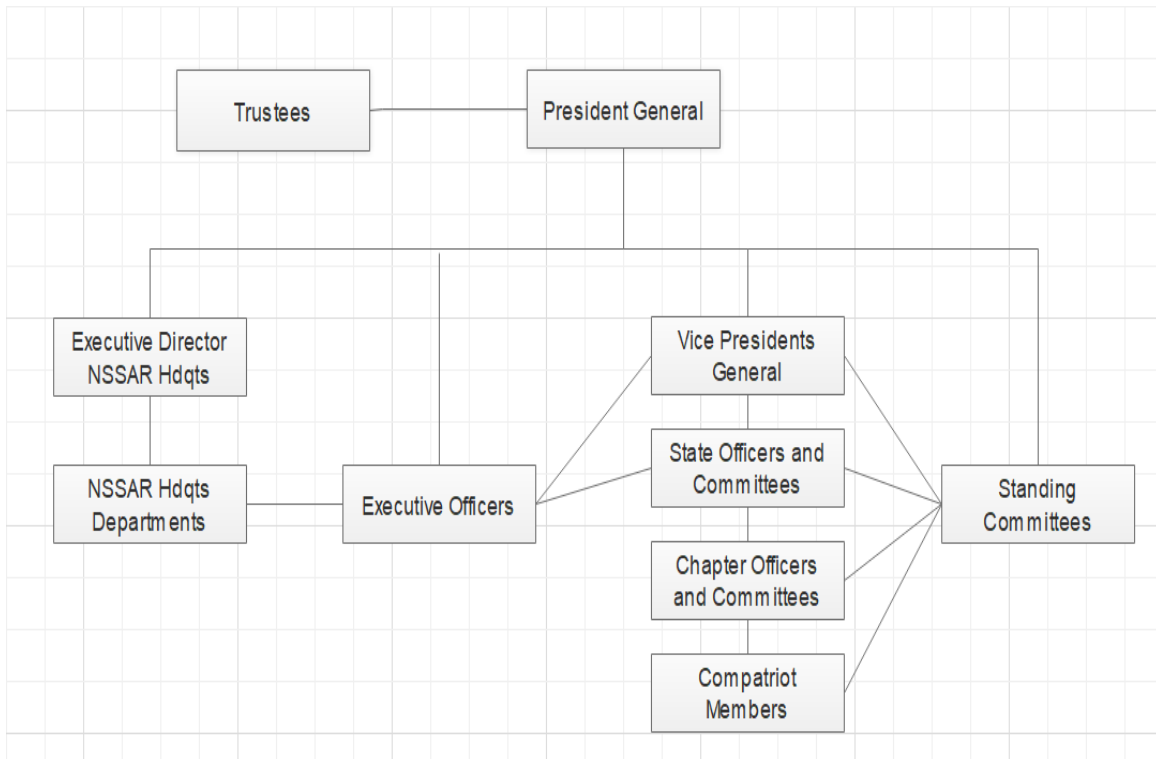
The California Society of the Sons of the American Revolution was instituted October 22<sup>nd</sup>, 1875. It was the first body in inception, institution and organization, to unite the descendants of Revolutionary patriots and perpetuate the memory of all those who took part in the American Revolution and maintained the Independence of the United States of America. It was fully and completely organized on the 4<sup>th</sup> of July, 1876, under the name of "Sons of Revolutionary Sires." On the 30<sup>th</sup> of April, 1889, a number of similar co-equal Societies of different States formed a general Society under the name of "The National Society of the Sons of the American Revolution," in which movement this Society heartily co-operated and changed its name to The California Society of the Sons of the American Revolution, under which latter name it has been since known. The acronyms SAR, NSSAR and CASSAR have been used to identify ourselves for over 100 years.

There are currently 24 chapters within California, with sizes ranging from ~15 to over 200 members. Eleven chapters are located in Northern California and 13 chapters are located in Southern California.

A current list of all past presidents of the CASSAR can be found on the CASSAR web page at <https://www.californiasar.org/wp-content/uploads/California-Society-Presidents-Book-2021.pdf>

## ORGANIZATION

The Sons of the American Revolution is (at a high level) organized as shown in the following chart:



General Officers of the NSSAR and trustees are elected at the National Congress each year, and are sworn in that time. Brief discussions of the national officers and positions are covered later and in the National Handbook, Volume 1.

The NSSAR holds three meetings each year; two Leadership meetings (spring and fall) which are generally held in Louisville KY, and the annual Congress which is typically held in July of each year. All compatriots are welcome to attend the leadership meetings and the Congress; State Society officers are encouraged to attend.

Most of the National Society's business is handled during the leadership meetings in Louisville, and includes meetings of the trustees and the various committees.

The National Congress is held in July at various locations throughout the country. While some of the Society's business is conducted at this time, the primary focus is recognition of the Compatriots from the previous year, elections of General Officers and youth awards presented to national winners.

## **NATIONAL OFFICERS**

A brief description of the National Officer's duties is included below; more comprehensive descriptions of each officer's duties can be found in Volume 2 of the National Handbook. See [SAR Handbook – National Society Sons of the American Revolution](#). Each of the officers below is elected at the annual National Congress.

**President General** – The Chief Executive Officer of the National Society.

**Secretary General** – The Secretary of all National Society meetings, including those of the Executive Committee, the Board of Trustees and such other meetings of the National Society as may be required in the conduct of the Society's business.

**Treasurer General** – The Chief Financial Officer of the National Society.

**Chancellor General** – The legal advisor to the National Society.

**Genealogist General** – He examines all applications for membership in the Society and approves those applications found to be in accordance with the policies, criteria and procedures established by the NSSAR. The duties of this position may actually be performed by the genealogist staff at NSSAR Headquarters.

**Registrar General** – The custodian of the membership data of the National Society, and maintains a roster of members and related data.

**Historian General** – He, working with the Education Director, oversees the history programs of the National Society.

**Librarian General** – The custodian of the books, manuscripts, maps, microfilm, pamphlets, magazines and all other such printed material in the National Society's Library.

**Surgeon General** – He advises the Executive Committee and the Board of Trustees of any health matter(s) which may be of concern to the National Society's membership.

**Chaplain General** – As a regularly ordained minister, he opens and closes meetings of the National Society with such services as are appropriate on such occasions. The Chaplain General is usually responsible for the memorial services held at Congress and the two leadership meetings.

**Vice President General** – There is one (1) Vice-President General elected from each of the 15 Districts of the National Society. The Vice-President General (VPG) is a General Officer, just below the President General. Additional information about the VPG’s duties can be found on the NSSAR website at [Helpful Notes for VPGs \(sar.org\)](https://www.nssar.org/helpful-notes-for-vpgs). The VPG position within a District is usually rotated among the states that comprise the District. It should be noted that the VPG position is not just a ceremonial or honorary position, but the Compatriot holding that position is encouraged to actively participate in activities within his district; additionally, he should be encouraged to maintain communications within the VPGs in adjoining districts. The VPG is a member of the Council of Vice-Presidents General, which provides the following:

- a platform from which to advise the President General and Executive Committee,
- a structured means of transmitting information, data and concerns between the National Society and the leadership of the State Societies,
- a forum from which practices, programs and issues can be shared between leadership from different Districts, and
- orientation, including review of responsibilities, duties and protocol, to incoming Vice Presidents General prior to their installation.

Thirteen of the 15 Districts within the National Society cover the United States; the remaining two Districts are the European District (covering all of Europe) and the International District, which includes the remainder of the membership not within the US or the European District (ie, the UK, Canada, South America, Africa, Asia, the Pacific region and Canada).

The California Society is within the Western District, which also includes the Nevada Society and the Hawai’i Society. The Western District website and related information (including bylaws) can be found at [www.wdsar.org](http://www.wdsar.org).

**National Trustee** – The Board of Trustees is the legal custodian of all National Society property, both real and personal. Each State Society nominates one Trustee and one Alternate Trustee, who are then elected at the end of the National Congress to serve until their replacement is elected – generally, one year. In other words, the Trustee serves for a year, starting at the end of the Congress at which he was elected/sworn in and serving until the end of the following year’s Congress when the new Trustee is elected and sworn in. Additional information on the trustee’s duties follows later in this document, since they are nominated by their State Society.



## **NATIONAL STAFF**

There are six divisions within the National Staff organization, as follows:

**Administration** – This includes the office of the Executive Director who oversees the operations of the NSSAR Headquarters, while collaborating with the SAR General Officers and other officers of the organization.

**Education, Museum and Library** – This includes the functions of educational outreach, the genealogical research library and the museum collection.

**Finance** – This includes all financial accounting functions associated with operation of the National Society and necessarily coordinates with the Treasurer General and the various finance-related committees.

**Merchandise** – This group is responsible for all Merchandise operations, including the purchasing and stocking of materials as well as the processing of orders from SAR state-level societies, chapters, and individual SAR members.

**Operations** – This group includes the following functions – Registrar, Genealogy, Information Technology and Special Events functions of the SAR Headquarters. This group is also responsible for management and maintenance of the SAR facilities and databases and related systems associated with membership.

**SAR Foundation** – This group is essentially the fundraising arm of the National Society staff. They seek to support the mission of the NSSAR through fundraising events and programs, grant seeking, and donor stewardship.

More information on the National Staff can be found at [SAR Staff – National Society Sons of the American Revolution.](#)

More information on the SAR Foundation can be found at [Sons of the American Revolution Foundation \(sarfoundation.org\).](#)

Information of interest to compatriots and officers of the NSSAR, CASSAR and chapters is published periodically in the *SAR Magazine*; some information that may need more timely distribution is e-mailed via [SAR-Officer@googlegroups.com](mailto:SAR-Officer@googlegroups.com). Compatriots can request to be placed on the Google group distribution list.

## **NATIONAL COMMITTEES**

The list of National Committees can be found on the NSSAR web page at [Committees – National Society Sons of the American Revolution \(sar.org\)](http://Committees – National Society Sons of the American Revolution (sar.org)) and is reprinted below. Volunteers who serve on boards and committees are the lifeblood of the National Society. They assist the SAR in policy making, assure the success of programming, reduce costs through their work, and help to provide services to our members and the community. The SAR values each and every member, but those who show their passion and commitment to the SAR through their volunteering efforts stand out among the crowd. If you would like to serve on a national committee, please look for your area of interest and contact the chairman of that committee.

The committees are reorganized periodically to better coordinate efforts of related groups (incorporating some committees as subcommittees of other parent committees). Nonetheless, the activities and efforts spearheaded by the various committees and subcommittees generally remain the same.

COMMITTEE NAME	CLICK BELOW:
American 250 <sup>th</sup> SAR Committee	<a href="#">WEB PAGE</a>
American History Teacher Award Committee	<a href="#">WEB PAGE</a>
Americanism Committee	<a href="#">WEB PAGE</a>
Audit Committee	<a href="#">WEB PAGE</a>
Branding and Engagement Committee	<a href="#">WEB PAGE</a>
Budget Committee	<a href="#">WEB PAGE</a>
Bylaws, Rules, and Resolutions Committee	<a href="#">WEB PAGE</a>
CAR Liaison Committee	<a href="#">WEB PAGE</a>
Chaplains Committee	<a href="#">WEB PAGE</a>
Color Guard Committee	<a href="#">WEB PAGE</a>
Congress Planning Committee	<a href="#">WEB PAGE</a>
Congress Review Committee	<a href="#">WEB PAGE</a>
Council of Presidents General	<a href="#">WEB PAGE</a>
Council of State Presidents	<a href="#">WEB PAGE</a>
Council of Vice Presidents General	<a href="#">WEB PAGE</a>
Council of Youth Awards	<a href="#">WEB PAGE</a>
DAR Liaison Committee	<a href="#">WEB PAGE</a>
Eagle Scout Committee (Arthur King)	<a href="#">WEB PAGE</a>
Education Committee	<a href="#">WEB PAGE</a>
Ethics Committee	<a href="#">WEB PAGE</a>
Executive Committee	<a href="#">WEB PAGE</a>

COMMITTEE NAME	CLICK BELOW:
Finance Committee	<a href="#">WEB PAGE</a>
Flag Committee	<a href="#">WEB PAGE</a>
Fundraising Committee	<a href="#">WEB PAGE</a>
Genealogical Research System Committee	<a href="#">WEB PAGE</a>
Genealogy Committee	<a href="#">WEB PAGE</a>
George Washington Endowment Fund Board	<a href="#">WEB PAGE</a>
George Washington Endowment Fund Distribution Committee	<a href="#">WEB PAGE</a>
George Washington Endowment Fund Fundraising Committee	<a href="#">WEB PAGE</a>
Governance and Organization Committee	<a href="#">WEB PAGE</a>
Handbook Committee	<a href="#">WEB PAGE</a>
Headquarters Building Management Committee	<a href="#">WEB PAGE</a>
Historic Sites and Celebrations Committee	<a href="#">WEB PAGE</a>
History Committee	<a href="#">WEB PAGE</a>
Hospitality and Music Committee	<a href="#">WEB PAGE</a>
Human Resource Committee	<a href="#">WEB PAGE</a>
Information Technology Committee	<a href="#">WEB PAGE</a>
Insurance and Risk Management Committee	<a href="#">WEB PAGE</a>
Investment Committee	<a href="#">WEB PAGE</a>
King's College London Partnership Committee	<a href="#">WEB PAGE</a>
Knight Essay Contest Committee	<a href="#">WEB PAGE</a>
Ladies' Auxiliary Liaison Committee	<a href="#">WEB PAGE</a>
Legal Advisory Committee	<a href="#">WEB PAGE</a>
Library and Archives Committee	<a href="#">WEB PAGE</a>
Magazine Committee	<a href="#">WEB PAGE</a>
Master of Ceremonies Committee	<a href="#">WEB PAGE</a>
Medals and Awards Committee	<a href="#">WEB PAGE</a>
Medical Committee	<a href="#">WEB PAGE</a>
Membership Committee	<a href="#">WEB PAGE</a>
Merchandise Committee	<a href="#">WEB PAGE</a>
Minuteman Award Committee	<a href="#">WEB PAGE</a>
Museum Board	<a href="#">WEB PAGE</a>
Newsletters and Publications Committee	<a href="#">WEB PAGE</a>
Nominating Committee	<a href="#">WEB PAGE</a>
Officer Training Committee	<a href="#">WEB PAGE</a>

COMMITTEE NAME	CLICK BELOW:
Operation Ancestor Search Committee	<a href="#">WEB PAGE</a>
Patriot Records Committee	<a href="#">WEB PAGE</a>
Patriotic Outreach Committee	<a href="#">WEB PAGE</a>
Premium Member Medals Program	<a href="#">WEB PAGE</a>
Protocol Committee	<a href="#">WEB PAGE</a>
Public Relations Committee	<a href="#">WEB PAGE</a>
Public Service and Heroism Committee	<a href="#">WEB PAGE</a>
Records Digitization Committee	<a href="#">WEB PAGE</a>
Reenactor and Living History Liaison Committee	<a href="#">WEB PAGE</a>
ROTC, JROTC, and Service Academies Committee	<a href="#">WEB PAGE</a>
Rumbaugh Orations Contest Committee	<a href="#">WEB PAGE</a>
SAR Annual Conference on the American Revolution Committee	<a href="#">WEB PAGE</a>
SAR Education Center & Museum Committee	<a href="#">WEB PAGE</a>
SAR Implementation Committee	<a href="#">WEB PAGE</a>
Social Media Committee	<a href="#">WEB PAGE</a>
Social Media Committee	<a href="#">WEB PAGE</a>
Strategic Planning Committee	<a href="#">WEB PAGE</a>
Veterans Committee	<a href="#">WEB PAGE</a>
Veterans Recognition Committee	<a href="#">WEB PAGE</a>
Younger Members Committee	<a href="#">WEB PAGE</a>
Youth Exchange Program	<a href="#">WEB PAGE</a>

In addition to the above web links, the various committees will generally post their documents (meeting agendas, etc...) on the SAR ShareFile system. Sharefile allows every member, officer and committee to remain current on the organization's initiatives by allowing sharing of resources such as video, reports, documents and other digital assets. If you are getting ShareFile notifications, it means your email address has been added to the system. Feel free to login and explore the various reports, minutes and other materials placed in the Member's folder.

If you have not received a ShareFile notification and you would like to, send a note with your **name, National Number and email address asking to be added to the system**. If you do not wish to be involved with ShareFile, send a note with your **name, National Number and email address asking to be removed**.

## **CASSAR STATE OFFICERS AND COMMITTEES**

A current list of the California State SAR officers and committee chairs can be found online at [SAR California Officers & Program Administrators \(californiasar.org\)](http://SARCaliforniaOfficers&ProgramAdministrators(californiasar.org)), with position descriptions listed in the CASSAR Bylaws – see [About California SAR – SAR California](#). In general, the term of office is one year, except for the Vice President – Membership (2 years) and the Investment Fund Trustees (staggered 3-year terms). The term “Board of Managers” is used periodically in this section, and includes the state officers and chapter presidents.

Compliance with the bylaws is mandatory, as they form the foundation of how the entire organization functions. Failing to follow them puts the board and the nonprofit at legal risk and may also put each officer at individual risk, which D&O insurance will not cover. It is therefore absolutely necessary that all Compatriots adhere to and comply with the bylaws.

Compatriots MUST be aware of their roles, especially if they hold concurrent state AND chapter officer positions. Those compatriots MUST keep their roles separate and endeavor to not let one position interfere with the other to the detriment of either position/office.

Following is a general description of their duties (refer to the CASSAR Bylaws for specific requirements and details):

**State President** – In addition to the duties identified in CASSAR Bylaw No. 4 Sec 2, he also represents the CASSAR at the National Congress during his term of office and should attend the National Leadership and Trustee meetings, and the Council of State Presidents (CoSP) meetings. He continues as a member of the CoSP as immediate past president of the CASSAR and also represents the State Society at State Meetings of the DAR and CAR and should attend as many SAR Chapter meetings as possible during his term of office. A list of the tasks and duties is provided on pages 43-45 of this document.

**State Vice-President** – The CASSAR has four vice-presidents; an Executive Vice-President (President-Elect), two regional vice presidents (Vice-President North and Vice President South) and Vice President Membership. All are encouraged to visit chapters within their sphere of responsibility. The vice-presidents also have the following duties, in addition to those duties specified in CASSAR Bylaw No. 4, Sec 3:

The State Executive Vice-President supervises arrangements for State meetings, and works with the Presidents of the respective host Chapters for said meetings. He arranges for such items as hotel selection, menu items, meeting rooms, invitations to DAR, CAR, any speakers, and SAR dignitaries. He may also arrange for a special Officers Dinner to honor dignitaries representing the NSSAR (President General, Vice-Presidents General, General Officers, and others) who attend the State Meetings.

He is usually the editor of the California Compatriot and may solicit articles for the publication.

The regional State Vice Presidents (North and South), in their respective parts of the state, have oversight responsibility for the operation and management of the chapters. They should maintain open communication with each other and the Executive Vice President so as to facilitate harmony within the Society.

The regional Vice Presidents also act as the state flag committee co-chairs for all flag-related efforts; and collect flag ceremony-related information for forwarding to the NSSAR Flag Committee chair in a timely manner. They should also encourage chapter participation in the various NSSAR programs.

The Vice President - Membership assists the chapters in recruiting, retention and reinstatement and is generally the primary point of contact for those interested in becoming members of the Society. He should routinely obtain a list of dropped members from the State Secretary and should work with the regional Vice-Presidents and chapters to correspond with those dropped members to encourage their reinstatement.

The Executive Vice President and the regional Vice-Presidents should attend the National Leadership/Trustee meetings and the National Congress, to familiarize themselves with the procedures and responsibilities.

**State Treasurer** – He is the Chief Financial Officer of the State Society and serves as a member of the Budget and Planning Committee. He collects and keeps the general operating funds and the investment funds of the Society except for the Permanent Fund and the corpus of the CASSAR Education Fund. The State Treasurer maintains all funds in accounts that provide the best return on investment without taking any unnecessary risks of loss.

In addition to those duties identified in the Bylaws, he is also responsible for the following:

Preparation of the preliminary proposed budget for the coming year for presentation to the Budget and Planning Committee at each Fall meeting of the Society; preparation of the proposed budget for the coming year for presentation to the Budget and Planning Committee at each Spring meeting of the Society.

Preparation of a detailed financial report by budget category for income and expenses to the Budget and Planning Committee and to the Board of Managers at each state meeting.

He works with the Audit Committee prior to the Annual Meeting of the Society by presenting and explaining all financial transactions for the business year just ending; and works with the State Secretary in receiving annual dues from the members through their chapters, and in providing the State Secretary with payment to the National Society for all dues paid.

He causes the income tax federal and state forms and Attorney General Registry of Charitable Trust Form CT-2 to be prepared and filed in a timely manner and maintains the tax ID number of the State Society and the constituent Chapters.

**Investment Fund Trustees** – The trustees are responsible for managing the investment funds and reporting on the status at the Annual Meeting in the spring and the Fall Board of Managers meeting. This includes administration of the Life Membership Fund.

**State Secretary** – He works with the State Historian to ensure that accurate minutes of the two State meetings are recorded. He should send the meeting minutes to the Executive Board and Chapter Presidents at least 30 days prior to annual meetings.

He ensures that notices of the two state meetings are properly published and that the membership is notified within the constraints outlined in the California Society's Articles and Bylaws. The Secretary maintains the minutes of meetings, either in a book designated for that purpose or online.

He maintains a detailed membership list and ensures that the Registrar General has a current membership roster of dues paid members annually, no later than January 31 of each year according to the bylaws of NSSAR.

He is responsible for reporting the following to the Executive Director NSSAR:

- A list of dues paid members who have renewed their memberships in the Society
- Those dropped for non-payment of dues
- Those who are deceased
- Those who have duly executed a proper transfer to or from this society
- Those who have been properly reinstated to membership
- Junior members
- NSSAR Life Members
- Emeritus Members
- New Members
- State Dual Memberships

He submits a written annual report for the State Society in the format and with the attachments as required by the National Society no later than January 29 each year.

He reports to the National Society those compatriots who have been duly elected to represent the California Society as state officers (including chapter officers) no later than April 15, and report to the president of the Council of State Presidents the names of the newly elected State President and Executive Vice President. In addition, he reports to the National Society those compatriots who have been duly elected to represent the California Society as delegates to the annual National Congress no later than June 9 of each year. He also completes and mails to each delegate the Certification of his being a delegate, so that the delegate may be allowed to vote at the annual National Congress.

He reports the Officers of the California Society that have been duly elected and properly installed at the annual membership meeting and provides to the National Society, the name, current address, and office of each Chapter President and Chapter Secretary. This should be done as soon as possible after the Annual Meeting to allow the editor of the SAR Magazine to properly publish these names and addresses in a timely manner.

He is to be listed as corporate officer in the annual filing with the California Secretary of State's Office. In addition, the Secretary shall maintain the tax-exempt status with the California Department of Revenue.

He ensures that each new Compatriot receives a properly executed and signed membership certificate.

He notifies the Registrar General of the death of any compatriot and shall place the information on the Obituary Form provided by the National Society and should also notify the state chaplain of such information.

He maintains copies of all past and present applications of CASSAR members. The State Secretary shall supply to the DAR and the C.A.R. all information that is available on a California application from said officers of those societies when requested.

After coordination with the President, the State Secretary provides the agenda for both the Spring Meeting of the Membership and Fall Meeting of the Board of Managers.

The State Secretary obtains reports from all State Officers and Committee Chairs and prepares the annual state report to be published on the CASSAR website 30 days prior to the Annual Meeting of the CASSAR. In addition, the State Secretary should obtain the annual change of officer reports no later than January 31 of each year from the chapter secretaries.

The State Secretary should conduct annual training sessions with chapter secretaries to review the procedures for filling out the CASSAR Reconciliation Report, NSSAR/CASSAR Reports, and information and dates for reports that are required to be sent to CASSAR.

**Deputy/Assistant Secretary** (a non-voting, non-elected officer) may be appointed by the State President to assist the State Secretary as needed, to train in all the duties of the Secretary. When the current secretary retires, the deputy secretary will be in an excellent position to run for secretary, as he will have been already trained for the position. The Deputy Secretary will generally have the following defined duties:

- Have complete charge of the Change of Officers reports which is prepared for the Executive Board of the names and email addresses of the chapter officers.
- Collect the annual chapter, and bi-annual CASSAR officer and committee reports and submit them to the State Secretary at least 45 days prior to the meetings.
- Maintain a current email contact list.



- Provide web site updates to CASSAR IT Chairman as needed.
- Send the national roster to chapters for reconciliation (mid-year) so the chapter can reconcile their roster prior to the annual CASSAR/NSSAR Reconciliation Report.
- Assist the Secretary in collecting and preparing all year-end reconciliation reports.

**State Registrar** – He reviews evidence of ancestry and service of applications submitted to him using standards approved and issued by the National Society and responds to all queries regarding National Society application requirements and is the single point of contact between the Chapter Registrars and the National Genealogy staff.

Upon receipt of applications from sponsoring Chapter Registrars, he reviews the application and supporting documentation package for problems which might result in their pending by the National Genealogy Staff, and notifies the sponsoring Chapter Registrar of problems that need correction. For applications that are pended, the State Registrar works with the Chapter to correct discrepancies in a timely manner.

He ensures that proper fees accompany the applications and forward those fees to the State Secretary for recording and forwarding to the State Treasurer. He also forwards the Application and National fees to the Treasurer General using the NSSAR transmittal form to the National Society for review and approval.

He works with the Genealogist General and the Staff Genealogists so that applications are approved in an expeditious manner.

He should maintain a log of new membership applications and supplemental applications that include the applicant's name, ancestor, date received, and date transmitted to National Society. The log should also include notations for additional information sought and final approval status. He should also maintain a log of National Society transmittals and dispense information from this log to other State of Chapter Officers upon request.

**State Genealogist** – He reviews evidence of ancestry and service of applications submitted to him using standards developed by the National Society and issued under guidelines from the Genealogy Committee and the Genealogist General.

He assists the sponsoring Chapter of discrepancies with pending applications and works with the State or Chapter Registrars to get applications approved and forwarded to the National Staff Genealogist for final approval. He may also work with the Staff Genealogist in reviewing applications that have been held up for additional information and should assist the applicant in obtaining the necessary documentation requested.

He should keep his State Society informed as to new changes and policies recommended by the Genealogy Committee and the Genealogist General and should be available to any member of this society for assistance in preparing applications for prospective members or for preparing their supplemental applications.

**State Chancellor** – He must be an attorney licensed to practice law in the State of California and serves as the Corporate Counsel for the CASSAR. He provides legal advice on SAR matters to the Annual Meeting of Members, Board of Managers and Officers of the State Society; serves as the Parliamentarian at all State Meetings; and serves as a member of the State Bylaws and Resolutions Committee to draft the language of proposed amendments to the Articles of Incorporation, State Bylaws and State Standing Rules.

He ensures that the official copy of the CASSAR Articles of Incorporation, State Bylaws and State Standing Rules are maintained on the CASSAR web page at [About California SAR - SAR California](#).

He serves as the Chief Justice of the State Society to decide matters of law including, but not limited to, the interpretation of the Articles, Bylaws, Standing Rules and Robert's Rules of Order (Revised) to a given fact situation when requested by the membership, the Board of Managers or a State Officer acting within the scope of his office.

**State Chaplain** – He should attend all State meetings and be able to provide Invocations and Benedictions for meetings and meals at each function. He should forward condolence cards to the family of compatriots upon notification of their death; provide Chapters reimbursement of funds by CASSAR for Memorial Markers available through NSSAR Merchandise; compile a necrology report for the Annual meeting of the Membership; and conduct a Memorial Service at the Annual meeting for those compatriots who passed during the preceding year.

He will also serve as Ethics Committee Chairman (see Bylaw #5, Sec 2j).

**State Historian** – He is charged with taking the minutes of the two state meetings. He should submit articles of historical interest to the *California Compatriot*, and assist and encourage chapters to elect or appoint a Chapter Historian who should present a historical story or event during regularly scheduled chapter meetings. A calendar which portrays historical events on certain days of the year is a good source.

He should collect and maintain the State Meeting agenda and all events that have taken place during those meetings including photographs and other important materials that may have historical importance. He acts as the CASSAR Archivist, maintaining a safe place to keep important documents, books, membership applications and other articles of historical importance. He will be the recipient of historical information unless otherwise directed by the Board of Managers.

He should coordinate with the State Secretary as to who will be responsible for taking minutes and photographs of the two state meetings.

**CASSAR Compliance Officer** (appointed) – He maintains a list of all the chapters and tracks when they have submitted a) the annual tax forms, b) the annual change of chapter officer reports, and c) the annual reports for the BOM meeting and contacts the chapters and remind them to submit the required taxes and reports to him. If any chapters fail to submit their reports in full, he should contact the relevant area vice president to get any missing reports or information.

**National Trustee** (nominated) – He represents this Society on the National Board of Trustees. In discharging his duties as set forth in the Constitution and By-Laws of the National Society of the Sons of the American Revolution, he shall always endeavor to express the true consensus of the State Society and to exercise his own judgment within the scope of the State Society's position and guidelines to him.

Per the National By-Law 16, Section 2, an Alternate Trustee should be chosen by the Board of Managers to act in place of the Trustee when required.

This position is considered a National Office. Each State Society nominates a Trustee and an Alternate Trustee during their Annual meeting; but they are actually elected and sworn in as part of the last business item at each Congress. The new Trustee then serves from the end of the Congress at which he was elected until the end of the next Congress when the next (new) Trustee is elected and sworn in.

The Alternate Trustee represents the State Society at the Trustee's meetings if/when the elected Trustee is unable to attend. It is therefore critical that the Alternate Trustee become familiar with the roles and responsibilities of the position, typically by attending the Trustee meetings.

It is customary for the immediate past President to fill the role of Trustee for the next year, but it is up to the nominating committee to make this nomination. The nominating committee should ensure that he will attend the two leadership meetings in Louisville and the next Congress. The Trustee carries the one vote allowed for a State Society at Trustees Meetings. An Officers Streamer Award is made to those states societies whose officers attend all three meetings.

The Trustee must be familiar with the CASSAR Bylaws and the National Handbook and his responsibilities. It has become the custom for the California Society President to present the Trustee with a Trustees pin and certificate at the first BOM meeting following Congress.

The Charter of the National Society SAR states that not less than 40 Trustees who shall be elected annually at such time as fixed by the Bylaws shall manage the property and affairs of the Society. Trustees hold office for one year, and/or until their successor is elected and qualified and serve without compensation. Article IV, Section 2 of the National Constitution provides that a Board of Trustees, consisting of the General Officers, living Past Presidents General and one member from each State Society, shall administer the affairs of the National Society.

No compatriot should accept the office of Trustee unless he is willing to actively assume all of the responsibilities and duties thereof. If he does not have the time, resources and interest to devote to the office, he should decline, and another Compatriot should be nominated.

A Trustee is junior in rank to National officers and senior to State officers on all issues of protocol.

A Trustee represents his State Society at the National level, but his representation should be with the advice and consent of the State President and the CASSAR Board of Managers.

A Trustee should attend all of the CASSAR 's functions and meetings and aid the State President in hosting National officers; he should attend Western District Meetings when called by the District Vice-President General; attend and represent his State Society at all meetings of the Trustees; and encourage his State Society to recommend qualified compatriots for National committees. These recommendations should be submitted to the National Executive Secretary, by May 1<sup>st</sup>, who will transmit them to the newly elected President General; forward copies of all Chapter and State Society adopted Resolutions to be considered by the next Congress to the National Chairman of the Resolutions Committee; and invite and encourage his State President and other State Officers to attend National Trustee meetings so that they may collaborate upon the issues present. Note that visitors have the freedom of the floor, but not a vote.

He should also maintain a close and constant relationship with the Vice President General of the Western District. When required by National Society action, he should recommend the State and Chapters review, revise and update their Bylaws; and serve as liaison between the State Society and the National Society.

He should submit to the CASSAR Board of Managers a detailed report of the business enacted and/or actions under consideration by the Board of Trustees.

While at Congress, the Trustee should take careful notes and prepare his report for the first BOM meeting following Congress. This should include an attachment for any state/chapter/individual awards received at Congress. Copies should be prepared for the CASSAR President, the CASSAR webmaster, the editor of the California Compatriot, the CASSAR Historian, the CASSAR Secretary and the Chair of the CASSAR Medals and Awards Committee.

Trustee reports on business conducted at NSSAR are rendered following each Trustee meeting. If a special situation occurs, the Trustee should seek the guidance of the Executive Committee on how to vote on any controversial issue.

Since the Trustee has typically served as the CASSAR President, he should remain a ready resource to assist the current President in his duties. The Trustee serves until the end of the following Congress when he is replaced with a new Trustee.

Although a State Society's National Trustee represents his society at the national level, all National Trustees have a fiduciary duty to the NSSAR to manage and protect the SAR's affairs and assets in the best interests of the National Society for the benefit of all Compatriots. The duties and responsibilities can be found at <https://www.californiasar.org/members-section/about-sar/>.

**Meetings and Credentials Committee** (including the Executive VP, the President of the chapter hosting the meeting, and others deemed necessary) should contact the chapters, and maintain a list of all eligible voters, and ensure that all chapters have responded with delegates, chapter presidents/designees, etc. If chapters do not respond, they should contact the relevant area vice president to contact the chapter and get any missing information.

**Nominating Committee** - The most recent seven past state presidents are members of the nominating committee; the second most recent past president is the chair of the nominating committee. This allows the most recent past president to become familiar with the workings of the committee before taking on the role of chairman. The nominating committee should start identifying potential officer candidates during the summer preceding the next annual meeting, although informal discussions should be held earlier to avoid last-minute panic.

**Other Committee Information** – The President can appoint/dissolve committees as necessary, other than those required and as identified as Standing Committee. Most Committee Chairs appoint committee members, but the State President can opt to appoint all committee members unless otherwise specified. All committee chairs must be familiar with the requirements and expectations of their committee, including those spelled out by the various NSSAR documents.

**Ladies Auxiliary** – A Ladies Auxiliary organization exists solely to help raise funds for the various youth programs at the national, state or chapter levels; this organization is open to the wife, daughter or mother of a current member of CASSAR or the widow of a CASSAR member. There are no requirements for one to prove their ancestry to a patriot.

All members should be aware that the Ladies Auxiliary organization is NOT the same as the Daughters of the American Revolution (DAR). Membership in one does not qualify one for membership in the other organization.

See the following links for current CASSAR committee chairs: Committee chairs –

<https://www.californiasar.org/officers>

Youth programs - <https://www.californiasar.org/members-section/youth-program-info>

The NSSAR has developed training courses for specific positions (and new members); they are available online at <https://www.sar.org/courses/>. In addition, the SAR is developing a number of online courses (SAR University) that will be available to all members intended to help inform and train them.

## **CHAPTER OFFICERS AND COMMITTEE CHAIRS**

The list of chapter officers and committee chairs follows on the next few pages and may vary, depending on the needs and resources of the chapter. The offices of the president and the treasurer **MUST** be held by two individuals – one person cannot hold both positions.

**President** – He presides at all meetings of the chapter and exercises the usual functions of a presiding officer under the general rules of the chapter.

He appoints all chapter committee chairs and is an ex-officio member of all committees except the Nominating Committee and performs other representative duties on behalf of the chapter. He should enforce strict observance of the Constitution and By-Laws of the National, State and Chapter, and inform the other chapter officers on all matters. He is expected to attend the CASSAR Annual Meeting and the Fall Board of Managers meetings as a member of the State Society Board of Managers.

He should ensure that the chapter's annual report is prepared and submitted to the State Secretary in a timely manner, so as to meet the requirements of the CASSAR Bylaws.

**Vice-President** - In the absence of the President, the Chapter Vice President will preside and perform the duties of the President. The Vice-President may also take on other responsibilities (ie, arranging programs for chapter meetings or overseeing membership recruitment and retention for the Chapter).

**Secretary** – While defined by individual chapters, in general the Secretary's duties include most of the administrative activities required by the chapter. These may include but are not limited to:

### **1. Membership Roster:**

- Maintains a current chapter roster, recording new members as necessary.
- Files a NSSAR death notices with the State Secretary and State Chaplain as necessary and updates the chapter roster.
- Receives approved new membership packets and notifies the chapter executive board.
- Receives and processes approved supplemental ancestor applications.
- Processes member transactions such as transfers, reinstatements, life member applications, etc. and updates the chapter roster.
- Prepares recognition certificates. Issues medals and awards.
- Maintains the current copy of the chapter bylaws and other chapter documents.

## 2. General Administrative duties:

- The secretary issues monthly meeting notices.
- The secretary attends meetings of the chapter membership and executive board, records, and publishes minutes of these meetings.
- Each January, the secretary prepares a “Change of Officers” form and files it with the State Secretary. (*Form is located on the CASSAR website*).
- Each September, the Secretary compiles annual dues notices for his chapter members and mails them to the membership on October 1<sup>st</sup>.
- At the end of the dues collection period on December 15<sup>th</sup>, he prepares a NSSAR Dues Reconciliation Workbook and forwards it to the State Secretary for review and approval. Upon approval, he forwards the workbook to the chapter treasurer to issue the checks for the payment of next year dues. Note that dues are due by January 1st of each year. Reinstatement s and late filings should be sent by February 1 and March 1, respectively. The final filing date is March 15 of each year. After that, a reinstatement form is required.
- The Secretary is the source of information for the membership regarding bylaws, both chapter and state, and their handbooks.

**Treasurer** – He keeps a list of current members and collects/records money received from members. In some Chapters, the Treasurer is responsible for collecting and paying for the meeting meals. He should keep an accurate list of all monies deposited to the Chapter Account and should allow the Chapter Audit Committee to examine the Chapter accounts a minimum of once a year. Other duties include:

- Maintain a current accounting of all funds belonging to the Chapter and report same to the Secretary at each meeting and to the membership as requested by the President. He should record each payment of membership dues and keep a record of the check number and date of each check, as well as the date received by the Chapter.
- Record each member's paid dues on the forms provided by the CASSAR Secretary and return to him for reporting dues to the State Society.
- Coordinate with the Secretary for member reinstatement. There is currently no reinstatement fee required by either the State or National Society. The most current fee schedule is usually a part of an insert in the Summer issue of the California Compatriot.
- Prepare an end-of-the year financial report for the year ending December 31st. A copy of this financial record should be sent in writing to the CASSAR Secretary no later than March 15th.

**Registrar** – He is usually the first point of contact for new applicants. He MUST be familiar with the current National Genealogy Committee Policies and Application Preparation Guide. An introductory letter or meeting is critical to getting the applicant started in setting up his online application and setting expectations. Other duties include:

- Examine all applications for membership in the society using standards established by the National Society, while ensuring that all information is entered correctly and that all documentation listed is eligible, legible and included with the application. If working with a new applicant, he should inquire whether he has any male relatives that may be interested in joining. If so, the applications can be prepared and submitted at the same time to take advantage of the family plan (which allows for reduced application fees).
- Work with the applicant in advising him how to obtain missing information that is necessary for the application to be approved by the National Society.
- Review supplemental applications before submitting them to the State Registrar.
- Compile the application and documents and completes the application checklist. This includes verification through the Megan's Law website – see [California Megans Law](#)).
- Ensure that the proper fees accompany the application and checklist and forward to the State Registrar along with the application for review and proper distribution; he should also forward the Chapter dues to the Chapter Treasurer for recording.
- Respond to the State Registrar's request for further documentation or other information that he feels necessary for approval.

The chapter registrar should be familiar with the NSSAR documents that can assist in preparation of new or supplemental applications. These include:

- Application Preparation Guide - <https://www.sar.org/wp-content/uploads/APG.pdf>
- SAR Application Formatting Guide - [Microsoft Word - HOW TO PROPERLY COMPLETE AN APPLICATION.doc \(sar.org\)](#)
- NSSAR Genealogy Policy Manual - [https://www.sar.org/app/uploads/2024-10-4\\_Genealogy\\_Committee\\_Policies.pdf](https://www.sar.org/app/uploads/2024-10-4_Genealogy_Committee_Policies.pdf)
- Guide to Completing SAR Membership Applications – <https://www.sar.org/wp-content/uploads/2020/05/Guide-to-Completing-SAR-Membership-Applications.pdf>
- NSSAR Membership Cost Reference Manual - [https://www.sar.org/wp-content/uploads/Cost\\_Guide\\_Manual\\_2024.pdf](https://www.sar.org/wp-content/uploads/Cost_Guide_Manual_2024.pdf)
- CASSAR Chapter Registrar's Handbook (chapter-specific)



Because of the amount of work typically entailed in developing a successful application, the Chapter Registrar should guide the applicant in developing the application and acquiring the documentation, rather than taking on that work himself. Open, timely and continuous communication is the key.

**Genealogist** – He should review evidence of ancestry and service of applications submitted to him using standards issued under guidelines from the Genealogy Committee and the Genealogist General and should assist the Chapter Registrar and applicants to get applications approved and forwarded to the National Staff Genealogist. He also works with the Chapter Registrar in reviewing applications that have been pended; he should assist the applicant in obtaining the necessary documentation requested. As such, he must also be familiar with the Genealogy Committee Policies and the Application Preparation Guide.

He should be available to any member of the Chapter for assistance in preparing applications for prospective members or for preparing their supplemental applications. In many chapters, the Chapter Registrar is also the Chapter Genealogist.

**Chaplain** - He performs the Invocation and Benediction for each Chapter Meeting as called for by the Chapter President. He should also coordinate the obituary reporting with the Chapter Secretary and maintain a current list of members who have passed away during the membership year and provide this list to the CASSAR Chaplain no later than March 15. This allows time for printing of the Necrology for the Annual Membership Meeting.

**Historian** – He maintains the Chapter history and should collect newspaper clippings, photographs, etc. for use in maintaining the Chapter Scrapbook, if the Chapter maintains one. He should coordinate with the Chapter Chaplain and Chapter Secretary on recording the biographies (and submittal of the Obituary forms) on deceased Chapter members; prepare and send Chapter news to the Editor of the *California Compatriot* and the editor of the *SAR Magazine* as required; and to the CASSAR State Historian the Chapter Annual report regarding historical events no later than April 1st of each year. This duty may be assigned to the Secretary or the President

**Sergeant-at-Arms** – He should take care that all flags and signs are properly displayed at all regular and special meetings of the Chapter; have care and custody of the chapter's Charter and see that is available when needed by the Chapter; see that name cards are prepared for the use of all new members and that name cards of all members are available for use at each meeting of the Chapter; and ensure that the meeting room is properly prepared.

**Program Chairman** - He should arrange for speakers, entertainment, or key recognition for each Chapter meeting; coordinate with the Chapter President for programs throughout his term; inform the Chapter Secretary of up-coming programs so that announcements can be sent to the membership; and send a thank-you note or some other recognition to the past speaker.

Without good programs many of our Chapters have endured hard times or have disbanded. A good program is one of the most effective recruiting tools for increasing memberships. It brings the members to the meetings, urges them to bring guests, and keeps the interest of the

membership. The duties of chapter program chairman are often performed by the Vice-President.

**Orations Chairman** – He should recruit contestants from qualified young men and women in the local communities by contacting schools, churches, local young peoples' clubs, etc...; assure that each candidate has been properly briefed in what is expected from her/him; arrange for a contest at the local chapter level; plan for the Chapter's winner to attend the Annual State meeting or other runoff contests as directed by the State Orations Contest Chairman.

He should handle all the chapter's correspondence and coordinate with the State Chairman and National Chairman as required.

**Medals and Awards Chairman** – He is responsible for coordinating awards at the chapter level to ROTC and JROTC cadets, NSCC/NLCC cadets, DAR members and CAR members, as well as the general public. He will generally work with the chairs of other committees for making awards on behalf of the SAR.

He MUST be familiar with the Medals and Awards section of the NSSAR National Handbook to ensure compliance at the Chapter level.

**Knight Essay Contest Chairman** – He should make available to High School Guidance counselors, English and History Teachers or Principals, information about the contest at the start of the school year; ascertain that the essay is for an original research paper written in English. The topic of the paper deal with an event, person, philosophy or ideal associated with the American Revolution, the Declaration of Independence, or the framing of the United States Constitution. More complete guidelines are available from the State Knight Essay Chairman.

He should work with the State Chairman in holding a preliminary round of competition at Chapter level to select one winner. The winning essay from each State Society will be forwarded for national level competition.

**Eagle Scout Chairman** – He should work with the local BSA Councils and Districts in their areas to obtain the names and addresses of the Scouts who have passed their Eagle Board of Review in the past year. Chapter Chairmen should follow-up with the Councils as needed to assure that they receive the required information. He should ascertain that scholarship applications are received by the chapter no later than December 15. The winning application should be forwarded to the State Eagle Scout Chairman by January 15, where the selection of a State winner will be determined by a panel of three judges. The State Society winner should be declared by February 8th and the winning application should be forwarded to the National Chairman no later than February 22nd for the National review and selection process.

Application forms and Four-Generation Ancestor Charts can be downloaded from the NSSAR Web Site (<https://www.sar.org/arthur-m-berdena-king-eagle-scout-contest/>).

It is advisable to set up a long-term relationship with the local BSA council office and work with the District chairs to ensure receiving requests for Eagle certificates in a timely manner. SAR members are sometimes requested to present the certificate at the Eagle Scout's Court of Honor.

**Color Guard Chair** – Many chapters have a Color Guard; it is recommended that anyone interested in the Color Guard program work with the Chapter Color Guard Commander or the State Color Guard Commander or his representative for additional information and protocols.

**C.A.R./DAR Liaison Committee Chairman** – he is the Chapter SAR representative to the local C.A.R. and DAR chapters. He reports local activities and offers assistance to the State C.A.R./DAR Liaison Chairman and should recognize local C.A.R. members who have shown exemplary service to their society. They may be awarded the Bronze C.A.R. Medal of Appreciation during a regularly scheduled chapter event or at a local SAR/DAR joint meeting.

Members of the SAR and DAR are also eligible to receive this award for their contributions in supporting the C.A.R. They can serve as a senior officer, assist with field trips, civic projects and the many programs promoted for the C.A.R.

**Chapter School Awards Program Chairman** – He works with officials of local Junior High Schools or High Schools in their area to select a graduate and award the "Bronze Good Citizenship Medal & Certificate" at their school graduation ceremonies. He should enlist the assistance of other members of their chapter to personally appear and represent their chapter to present these awards.

The concept for this award is to interact with this country's youth at a most critical time and influential period in their lives.

It is anticipated that such competition shall prove most successful in the selection of the student who best represents the highest of American ideals and character. This award is designed to place emphasis on the development of the qualities of courage, honor, leadership, patriotism, scholarship and service for all of our young people. The entire program exists to promote and support an understanding of each and all of these qualities.

The broad guidelines recommended to be utilized in the selection process include the following qualities to be considered and utilized in each selection process and include major emphasis on scholarship and service in their school, homes and communities:

- Dependability
- Cooperation
- Leadership
- Patriotism

As one can see, there are many opportunities for the chapter officers and members to become involved.

## **MEETINGS**

### **NSSAR**

The NSSAR holds three meetings each year; a National Congress (held in July at various locations throughout the country) and two leadership meetings (held in the Spring and Fall each year in Louisville, KY). State and Chapter officers are encouraged to attend, due to the business being conducted at these meetings. Trustees are expected to attend all meetings, as they have a fiduciary duty to the National Society.

Those planning to attend leadership meetings and National Congresses should plan ahead and reserve hotel rooms shortly after hotel registration opens up, as these tend to fill up quickly. Registration will open up several months prior to the meeting.

### **CASSAR STATE MEETINGS**

The CASSAR holds two statewide meetings each year. The Annual Meeting is held in the Spring each year (generally April) and the Board of Managers Meeting is held in the fall (generally November). A suggested state meeting agenda is shown in the CASSAR Bylaw 8(d). Following is a reprint from the Fall 2009 Compatriot on CASSAR state meetings, as written by John Dodd (Vice-President South, 2009 and NSSAR President General, 2023-2024). A list of tasks associated with planning a state meeting is included at the end of this document. New Compatriots or those not active at the state level mistakenly may believe California Society State meetings are not for them. Not so! All Compatriots are encouraged to attend both the Spring and Fall state meeting, whether as delegates or interested Compatriots.

*The Spring meeting is the "official" annual meeting, at which state officers, chapter presidents and chapter delegates deal with the Society's business. New state officers are elected and inducted. Generally, bylaws amendments are voted on at that time, unless a "special" meeting is called to coincide with the Fall meeting. The Fall meeting is the smaller "Board of Managers" ("BOM") meeting, at which the state officers and chapter presidents are voting attendees. The BOM adopts a budget for the upcoming year and attends to business which cannot wait until the Spring. At both meetings, attendees hear reports from officers, chapters and committee chairs, and consider policies, programs and initiatives.*

*The agenda for both meetings is similar, beginning Friday morning and ending Saturday night with a formal banquet. Friday's luncheon program is devoted to public safety programs, while the youth awards are presented at the April annual meeting and the chapter awards are presented at the Saturday Board of Managers meeting luncheon. Usually, Friday evening features a "President's dinner" for any national officers present, state officers and chapter presidents, although this format may vary. The Saturday night formal banquet features entertainment or a (hopefully not too long) dinner speaker, presentation of awards and great camaraderie.*

*The registration fee usually covers the cost of the meeting facilities, two lunches and Saturday banquet. The President's dinner is paid for separately by the invited attendees. A "hospitality suite" opens Thursday afternoon for registration, and is available for drinks, appetizers and socializing in the late afternoon and evening both days before the dinners.*

*The Ladies Auxiliary meets at both the Spring and Fall meetings, generally having its board meeting on Friday and the general membership meeting on Saturday. There usually is a planned ladies outing Friday afternoon, and the ladies actively sell raffle tickets throughout the weekend, with a drawing at the Saturday banquet to support the SAR's programs.*

*The Spring meeting is hosted by the incoming state president's chapter at a location of the incoming President's choosing. The Fall meeting is held in the same geographical area, i.e. northern or southern portion of the state, as the state President, who hopefully has made arrangements for a chapter to "host" the meeting while he was Executive Vice President.*

*Experience has taught our society that state meetings are most successful when planned, staffed and "banked" by a chapter, rather than the state. Hosting a state meeting invigorates a chapter, bringing out members who often do not attend other events and instilling a sense of camaraderie in the group. Also, compatriots are apt to be more cost conscious if they know their individual chapter, rather than the state, will either bear the burden if the meeting "goes in the red" or reap the benefit if the meeting "turns a profit." Typically, the goal is to break even, but a well-planned meeting will result in a few hundred dollars added to a chapter's treasury.*

*Hosting a state meeting requires diligent advance planning, which has been simplified by an excellent guide prepared by Rex Shannon of Orange County after serving as chair for the 2005 annual meeting at which Larry Magerkurth was inducted as State President. The host chapter is responsible for the hotel contracts (including meals, room rate and fees for meeting rooms), although the contracts must be approved in advance by CASSAR. The host chapter also is responsible for registration and the hospitality room. A spreadsheet has been developed to track attendance and costs over the years; this should be used for comparison purposes and planning.*

*The Friday luncheon (both Fall and Spring) recognizes recipients of the fire, police and EMS awards from deserving members of their community. The host chapter and incoming President, respectively, have the responsibility and discretion in choosing the recipients of these awards. Arranging the banquet speaker or entertainment also falls to the host chapter.*

*The Saturday youth banquet features the state youth program awards at the Spring meeting, while the Fall meeting usually features a talk from a teacher who attended the Valley Forge program during the previous summer. These programs are simple to arrange. In addition, chapter awards are often presented at the Fall luncheon.*

*With this background, various Compatriots have expressed concerns over the rising costs of travel in this era of tight budgets, resulting in consideration of a proposal to reduce the Fall meeting to a one-day meeting, held only on Saturday. Under this scenario, the Executive Committee would*

*meet Friday, along with the budget committee and any other committees wishing to do so, but the "main meeting" would not begin until Saturday morning. This would reduce the "overhead" to the Saturday luncheon and banquet, reducing the registration expenses by the cost of the Friday meeting room and luncheon, and eliminating the need for one hotel night. Although this would reduce the cost somewhat, it also results in a sharp decrease in the social aspects of our meetings, which is a prime reason for attending to many of our members.*

*Although the Executive Committee considered a proposal to "downsize" the Fall 2010 meeting, it was determined more input is necessary from the chapters. Therefore, this topic will be considered at the Spring 2010 meeting. Chapter presidents are requested to discuss the pros and cons of this proposal with their members and come to Sacramento prepared to share their thoughts so the Society may consider whether any changes are advisable.*

*In the meantime, all CASSAR members are encouraged to attend both the Spring and Fall meetings so as to meet new friends, renew acquaintances and work together to build our Society as it continues to take the lead in preserving the memories of our Patriot ancestors and our American Heritage.*

CASSAR has traditionally invited the President General or his designee (and other General Officers and candidates) to the state meetings – especially the Fall BOM meeting. The Fall BOM meeting usually has a candidates forum where General Officer candidates may seek endorsement from CASSAR and the Western District.

The hosting society (chapter or state) covers the PG's room, registration, and meal costs, but not travel expenses. Official requests for visits by the PG to State/District meetings are to be coordinated with the PG's Travel Coordinator at least 6 months prior to the event, as the PG's schedule fills up quickly. The PG's Travel Coordinator will identify the expectations of the requesting State Society/District. The state point of contact for the meeting MUST work with the PG's Travel Coordinator to ensure that all expectations are met so that the PG is made fully aware of the event details well ahead of the meeting.

An aide-de-camp should be assigned to the PG and the First Lady to ensure that all needs are met. The hosting society should provide assistance to all out-of-town attendees to ensure that questions can be answered in a timely manner. Above all, the hosting society should ensure that all information provided to attendees is timely, accurate and complete. Expectations for the hosting chapter or State society are on the following page.

Note that only members in good standing may vote at the Annual Meeting, and only CASSAR officers and chapter presidents (or their designees) may vote at the fall Board of Managers meeting. See Bylaw 8, Section 1. While anyone may attend the CASSAR meetings, nonmembers of the SAR/CASSAR may NOT vote on any issue that come before the body at any meeting.

To help ensure this requirement is followed, it's recommended that the registration packets include a colored card identifying those allowed to vote.

## Requests for Visits by the President General

Traditionally, the President General travels throughout the nation, visiting districts, state societies and chapters. Since invitations to the President General are numerous, they should be tendered well in advance of the date and should include alternate dates, if possible.

Because we are in the period of the 250<sup>th</sup> Anniversary of the Revolution, preference will be given to events which have some public component, highlighting the mission of the SAR for the general public. Examples would be (a) induction into the NSSAR of a local dignitary, celebrity or business leader; (b) presentation of gold, silver or bronze good citizenship medals (assuming required approvals); (c) presentation of heroism, lifesaving, and first-responder commendation medals; and (d) 250<sup>th</sup> associated events (bench, liberty tree, plaque, reenactment, etc.). Appropriate press releases should be prepared in advance of the event, with attempts to secure news media coverage.

At the very least, a photographer and videographer should be present for chapter, state, and national social media postings. Information regarding this public component is to be included on the President General's Travel Information Worksheet.

Preference also will be given to events within reasonable proximity of an airport. Events during the middle of the week are problematic.

1. **Visit Requests:** should be made as soon as possible after his election. His schedule is normally set by September.
2. **Invitation letter:** A letter of invitation should be sent to the President General and his travel coordinator, with a copy to the Executive Director.
3. **Coordinating the visit:** The President General should attempt to visit each District of the National Society during his term of office. Vice Presidents General of contiguous districts should confer and coordinate their invitations to the President General to allow the best coverage and minimize travel.
4. **Arrangements:** The President General and his wife, if she accompanies him, are always guests of the inviting district, state society or chapter, which will arrange for hotel and other accommodations and which will be the expense of the host organization. Meals are also the responsibility of the host, as well as transportation to/from the airport.
5. **Appointment of Aide/Host:** The President of the state society or chapter inviting the President General for a visit should appoint an aide/host to meet the President General on his arrival. The aide/host should assist him during his visit.
6. **Notification:** The President General should be informed in writing of the arrangements made for him. Such notification should be explicit in regard to the expected participation by the President General in the program and, if he is to speak, how long, and other relevant details.

**Note:** Normally, the President General is the guest of honor and may be the principal speaker at the function. However, the PG also enjoys an interesting program and is content to present brief remarks, rather than being the primary speaker. This must be clarified in advance. The type and purpose of the function is the responsibility of the host state society or chapter. At a dinner meeting



with black tie for the officers and head table guests, formal dress may be optional for other members and guests, enhancing the dignity and importance of the occasion. The invitation should be clear whether the event is black tie or business attire.

7. **Receiving Line:** In a receiving line, the presiding officer and his wife should be at the head of the line with the state society president and wife next to him (or vice-president general if a district meeting), so that he may introduce the guests to the President General. The remainder of the receiving line should be in the order of precedence outlined in the handbook.
8. **Respecting the office:** As per the Handbook, generally, the President General and his wife are to be escorted to the head table last, with everyone standing in respect to the office. The presiding officer stands in his position, then sits, and nods for everyone to be seated. The presiding officer should be brief in introducing or thanking other guests or participants, in the program when the President General is present.

## STATE MEETING PLANNING

A successful state meeting requires extensive planning well before the event, usually starting 9-12 months before the event. Because of the many details involved, the appointed planning chair would ideally have attended state meetings before taking on the leadership role; doing so will help reduce the learning curve. Details to be considered include business meeting logistics, attendee needs, meeting location needs and limitations, facility contracts/budgets, and so on. It is absolutely critical that all chairs involved in the planning and execution of the state meeting be fully informed throughout the entire planning process.

Following are those tasks that are typically seen and should be addressed in a timely manner – noting that many are interdependent. When developing the details on each task, the persons responsible, interdependencies and required/actual dates of completion for each task should be identified to ensure staying on task. Changes should be minimized when approaching the event date.

- Identify/appoint planning committee chair
- Set up new committees and committee chairs/coordinate with existing committees (ongoing)
  - Registration
  - Hospitality
  - Ladies Auxiliary
  - Special Events (ie, tours, grave markings, etc...)
  - Publicity/printing
  - Decorations
  - Protocol
  - Color Guard
  - Awards (CASSAR, youth programs, public service, etc...)
- Registration Committee
  - Organize committee members & assignments
  - Maintain list of delegates, guests, and other registrants
  - Collect any letters of delegation from chapter presidents
  - Schedule staffing for registration
  - Checkoff registrants and provide them with their packets
- Hospitality Committee
  - Reserve room for who stays in the Hospitality Suite (as applicable)
  - Organize committee members & assignments
  - Determine needs for Hospitality Suite
  - Arrange staffing support for hospitality room

- Ladies Auxiliary
  - Meeting requirements
  - Awards
  
- Special Events Committee
  - Organize committee members & assignments
  - Select venues & meal options
  - Thursday National Officers dinner – Transportation, contract venue, RSVP invitations
  - Friday presidents dinner – Transportation, contract venue, RSVP invitations
  - Identify needs and logistics for any tours (local transportation, etc...)
  
- Publicity/Printing/Souvenir Packet Committee
  - Organize committee members & assignments
  - Publish registration form on the CASSAR website
  - Select a logo for the meeting for programs & pin
  - Arrange production of souvenir pins (usually an incoming CASSAR president expense)
  - Determine registration packet requirements
  - Prepare & print Public Service Luncheon program (Friday)
  - Prepare & print Youth Awards Luncheon program (Saturday)
  - Prepare & print welcome Letter
  - Prepare & print meeting agenda and program
  - E-mail agenda to membership at least 20 days in advance
  - Print Memorial Service Program
  - Prepare & print list of past Patriot/Distinguished Service Medal Recipients
  - Assemble the registration packets – name tags, meal tickets, tourism brochures, souvenir pins, meeting program/schedule/agendas, welcome letter, Ladies Auxiliary agenda, etc...
  
- Decorations Committee
  - Organize committee members & assignments
  - Arrange table decorations for Luncheons & Banquet
  - Place programs & brochures at tables
  - Handout programs for the Memorial Service
  
- Protocol Committee
  - Organize committee members & assignments
  - Determine if PG will attend (must coordinate with PG travel coordinator)
  - Arrange PG transportation (and possibly other national officers)
  - Assist PG with registration and hotel accommodations (usually via the aide-de-camp)
  
- Color Guard Committee (CASSAR Color Guard Commander)
  - Coordinate all color guard activities
  - Verify with PG (or his travel coordinator) if the event will be a national color guard event

- Master of Ceremonies for luncheons and banquet
  - Identify MCs for all three meals/programs and provide sufficient background information to allow preparation of a script in a timely manner. Coordination is needed with committee chairs to ensure all details are addressed. Attempting to use an event program as a skeleton script is not conducive to a successful event, as something will invariably be left out.
  
- Miscellaneous
  - Determine meeting date
  - Contract hotel facility
  - Select speaker for banquet
  - Contract/arrangements for speaker
  - Coordinate with hotel on banquet meal selections
  - Coordinate with hotel to book upgraded suites (PG, Hospitality, CASSAR President)
  - Prepare agendas and schedule for meetings
  - Prepare welcome letter
  
- Prepare invitations with the registration form for National Officers and candidates for National office.
  - Follow up invitations for National Officers and candidates
  - Invite President General and other General Officers/candidates as appropriate
  - Coordinate with PG's travel coordinator at 6-9 months prior to the event, including identification of the aide-de-camp and the primary event Point of Contact. Ensure that ALL details and protocols associated with the PGs visit
  - Coordinate with CASSAR Secretary to announce delegate criteria
  - Invite local politicians
  
- Determine Registration Fees (Meeting planning chair)
  - Prepare Registration Form (may adjust as necessary)
  
- Memorial Service (CASSAR Chaplain)
  - Obtain names for insertion in program
  - Print programs
  - Honor Guard Escort
  
- Public Service Awards Luncheon Chairman and MC (CASSAR PS&H Chair)
  - Organize committee members and assignments
  - Coordinate local dignitaries to attend luncheons
  - Coordinate Law Enforcement Medal awardee
  - Coordinate Fire Safety Medal awardee
  - Coordinate EMT Medal awardee
  - Coordinate Heroism awardee (if nominee available)
  - Place programs at each place setting

- Youth Programs Luncheon Committee Chair and MC (CASSAR Program Chairs)

- Organize Committee members & assignments
- Coordinate recipients for attending luncheons
- Youth awardee's travel arrangements
- Place programs at each place setting
- Reserve meals for each recipient and his/her guests

- Installation Banquet

- Select Menu Options
- Coordinate speaker needs
- Ladies Auxiliary awards
- Organize committee members & assignments
- Identify appropriate gifts for the PG and First Lady, as well as any other CASSAR gifts

## **CHAPTER MEETINGS**

The CASSAR Bylaws require that chapters hold at least four meetings annually.

Chapter meetings are usually opened with an invocation, the Pledge of Allegiance and the SAR Pledge. Guests (SAR compatriots, guests, new members, applicants, etc...) should also be welcomed. Chapter business should be addressed to some degree; this may include a program, a registrar's report, elections/inductions, etc... followed by the SAR Recessional and a benediction. A suggested chapter meeting agenda is shown in the SAR Handbook, Volume 4.

## **SAR PROGRAMS**

There are a large number of programs available within the SAR at the national, state and chapter levels. Due to the large number of programs, the lists and descriptions are not included herein, but can be found through a search on the SAR web pages (<https://education.sar.org> or <https://www.californiasar.org>).

Likewise, the forms for these various programs and many of the SAR manuals can be found on the SAR web page at <https://www.sar.org/resource-repository/>.

America 250 - [america-250-sarprogramtoolkit aug 2023.pdf](#)

## **SAR AWARDS**

There are a large number of awards available to be presented to Compatriots, Ladies and the general public. The State Society and chapter awards chair should be aware of these awards and the limitations/requirements associated with them. Due to the large number of awards available, the list and descriptions are not included herein, but are spelled out in Volume 5 of the NSSAR Member's Handbook; see <https://www.sar.org/wp-content/uploads/2023/01/NSSAR- Handbook-Volume-V-22-DEC-2022.pdf>.

## **LEGAL DOCUMENTS / OTHER**

Various training modules can be found on the SAR website; these include training for all compatriots, registrars, PRS, youth protection and the blue database. These can all be found at [Courses – National Society Sons of the American Revolution \(sar.org\)](https://www.sar.org/courses-national-society-sons-of-the-american-revolution). Additional training modules are also being developed and will be made available as soon as approved.

NSSAR requires that all Compatriots interacting with youth complete the SAR Youth Protection program training. This training is good for three years, and should be retaken prior to its expiration. The YP training offered through the SAR is tracked automatically on the NSSAR servers, but it is highly recommended that, once completed (or retaken), a copy of the certificate be sent to the CASSAR Director of Youth Programs or the CASSAR Compliance Committee chair for tracking by the state. The training can be found at:

<https://www.sar.org/courses/youth-protection-training/>.

NSSAR Handbook - <https://www.sar.org/nssar-handbook/>

NSSAR Governing Documents (Volume 1)

NSSAR Membership policies are found in the Member Handbook (Volume 3, pages 1-5) NSSAR Code

of Business Ethics and Conduct Member Handbook Volume 3, pages 16-19 NSSAR Records Retention

Policy Member Handbook Volume 3, pages 21-22

NSSAR National Genealogy Policy Manual [https://www.sar.org/app/uploads/2024-10-4\\_Genealogy\\_Committee\\_Policies.pdf](https://www.sar.org/app/uploads/2024-10-4_Genealogy_Committee_Policies.pdf)

CASSAR Restated Articles of Incorporation <https://www.californiasar.org/wp-content/uploads/about-sar/CASSAR-BYLAWS-and-ARTICLES-OF-INCORPORATION-Rev.-April-2024.pdf>

Whistleblower Forms [Whistleblower 18Apr2009-2 \(californiasar.org\)](https://www.californiasar.org/whistleblower-18Apr2009-2)

Conflict of Interest Forms [Conflict of Interest 18Apr2009-2 \(californiasar.org\)](https://www.californiasar.org/conflict-of-interest-18Apr2009-2)

New Members Resources <https://www.californiasar.org/members-section/new-members/>

SAR forms and manuals can be found on the SAR website at <https://www.sar.org/resource-repository/>.

## **DISCIPLINARY PROCESS**

All CASSAR members and volunteers are required to comply with applicable federal, state, and local laws and regulations and with National Society SAR and California Society SAR bylaws and policies. Each member, volunteer and other stakeholder of CASSAR has an obligation to report in accordance with this Code of Business Ethics and suspected violations of this Policy.

The disciplinary process is intended to be implemented at the lowest level at which the alleged violation occurred. If the issue cannot be resolved at the chapter level, it should be assigned to the state for resolution. If resolution cannot be achieved at the state level, it should be forwarded to the National Society for resolution.

Alleged violations occurring at the chapter level should be handled at the chapter level in accordance with the governing documents of the chapter, state and national organizations.

Violations of this Policy may be referred to the CASSAR Ethics Committee for investigation. The investigation may be instituted by a written complaint or by information brought to the attention of the Chairman or a member of the committee. The committee shall investigate the alleged violation. At the conclusion of the investigation, the committee may hold hearings and take testimony as provided in Robert's Rules of Order, after which discipline may be imposed.

For some years, CASSAR addressed the disciplinary process at a high level within the Articles of Incorporation, Article X. In 2022, the National Society developed a model disciplinary process which was distributed to all state societies to help standardize the procedures throughout the Society. The CASSAR Bylaws were updated at the 2023 Annual Meeting, and the revised Bylaws have been added to the CASSAR web page at <https://www.californiasar.org/members-section/about-sar/>.



## HELPFUL HINTS

### Recommended Attire at Congress

	Men	Ladies	Special
Tours	Comfortable clothes - walking involved	Comfortable Clothes- walking involved	
Host Reception	Daytime dress, polo shirt, slacks	Daytime dress, slacks or capris	
Color Guard Breakfast	Uniform or blazer and tie	Colonial Dress or Daytime dress, pants suit or suit	
Memorial Service	Uniform or blazer and tie	Colonial Dress or Daytime dress, pants suit or suit	
First Lady's tea	N/A	Colonial Dress or Daytime dress, pants suit or suit (hats optional)	
Rumbaugh Orations Finals	Daytime dress, polo shirt and slacks	Daytime dress, pants suit or suit	
General Session	Coat and Tie	Daytime dress, pants suit or suit	
Youth Luncheon	Coat and Tie	Daytime dress, pants suit or suit	
Minuteman / Awards Night	Coat and Tie	Daytime dress, Pants suit or suit	<b>Minutemen</b> white dinner jacket, black tie. <b>New inductees</b> do not wear any insignia
Breakfasts, GW Fellows and VPGs Luncheon	Coat and Tie	Daytime dress, pants suit or suit	
General Session	Coat and Tie	Daytime dress, pants suit or suit	
Ladies Luncheon	N/A	Daytime dress, Pants suit or suit (hats optional)	
President General's Banquet	Black or white dinner jacket w/decorations or Continental Uniform	Colonial Period Attire or Long Formal Gowns	
General Session	Coat and Tie	Daytime dress, Pants suit or suit	
Installation Banquet	Tails, white dinner jacket with decorations, Black Tuxedo or Continental Uniform	Colonial Period Attire or Long Formal Gowns	<b>FPGs, newly elected General Officers and newly elected VPGs</b> Full Dress, White Tie/gloves/tails

## **HELPFUL HINTS**

### **National level (Congress and Leadership Meetings)**

Mingle with Compatriots from other states; don't just stick with California

Make extra effort to recognize new attendees; they can be identified by the green dots on their name badges.

Be aware of meeting/event times and schedules. There are many committee meetings, tours, opportunities for photographs, etc.... so one must be careful to keep track of all events. There is a LOT of activity going on!

Anyone interested in participating on a National Committee is generally welcome to attend that meeting. You should let the chair of that committee know that you are interested in participating, and he will make the recommendation to the President General who has the ultimate authority in approving such committee assignments. These committees and related subcommittees meet at the two Leadership meetings and may hold video conference calls between the two Leadership meetings. Don't plan on joining if you are not prepared to make a commitment to support the committee's activities.

### **State Level (Spring Annual and Fall BOM Meetings)**

Make extra effort to recognize new attendees. They likely know very few members, so this extra effort will help in retaining them. Make them feel welcome.

Ensure that General Officers and General Officer candidates invited to the event are treated with the respect due their position. Remember also that they have typically traveled large distances to the West Coast. Oftentimes, gifts are presented to the President General and First Lady as appropriate.

Be aware of meeting/event times and schedules

Trustees for a State Society are NOMINATED by their State Society; they are then ELECTED and sworn in as one of the last business items at each National Congress. They then hold office through the end of the following year's National Congress, at which time the newly- elected trustee is sworn in. The California Society typically makes their trustee nomination at the Annual (spring) meeting, and this information is forwarded to the NSSAR for inclusion in the Congress business agenda.

Protocol must be observed at all meetings – refer to the SAR Handbook, Vol IV.

## **Annual Duties of President – CASSAR**

Following is a month-by-month list of tasks that the California Society President should be aware of to help him plan his time effectively during his term of office. This list is by no means complete, but serves as a reminder of the major tasks and rough timeline during which those tasks should occur. There are some tasks that should occur every month – visiting and communicating with chapters, and writing a column for the California Compatriot. When visiting chapters, one should coordinate with chapter officers to ensure the date/time and location of the event.

### **May**

- Remind all California Compatriots about registering with the State Secretary if they are going to Congress; this includes the Executive VP and immediate Past President of the Society for CoSP activities.
- Set up California Dinner the evening of the Orations Contest – venue, contract, attendees, collect payment, pay the bill.
- Change address on Check Request Form on California SAR website.
- Write Welcome Letter for new Compatriots for Secretary to give out with new member packet.
- Talk to Secretary about getting a signature stamp.
- Confirm dates/locations of CASSAR chapter meetings.
- Confirm that officers (state and chapter) and contact information on the CASSAR web page are current.

### **June**

- Communicate with the membership about Congress.

### **July**

- Attend Congress.
- Set up the California Photo (5:30-6:00 PM) the evening of the PG's Banquet .
- Council of State Presidents – Attend both the breakfast and luncheon. Represent California; also remind immediate past president and Executive VP about the need to attend the CoSP meetings.
- Present any CASSAR Gifts to the Society during the Gifts portion of each business session .
- Verify Trustee Nominations at both SAR Headquarters and at Congress.
- Attend the State & Chapter awards ceremony following the Minuteman ceremony. Stand up whenever California receives recognition... collect certificates if called upon.
- Pick-up Credentials: Certification Form and Voting Card .
- Vote for Officers of the CoSP (President, Secretary, Assistant Secretary).
- Collect the California Americanism Poster entry and take it home unless it is one of the top 3 or 4 finalists.
- Using the SAR Motion Form included in "The Book", submit motions as appropriate.
- Invite NSSAR General Officers and candidates for next year's office to the California Fall BOM.
- Vote for the Contested Nominees to NSSAR Offices (3-5 pm 2<sup>nd</sup> day of Congress before Outgoing PG Banquet).

### **August**

- Develop the agenda for the upcoming BOM meeting
- Invite DAR and C.A.R. representatives to the fall BOM meeting
- Begin working with Executive VP on the following year's Annual Meeting.

### **September**

- Remind Executive VP of responsibility to do audit and prepare budget for the fall BOM meeting.
- Visit as many chapters as possible.
- Write an article for the Compatriot .
- Organize CASSAR dinner at the upcoming Leadership meeting.
- Remind chapter registrars about the importance of dues collection and timely reconciliation report development and submission.
- Decide on medals to be presented at BOM and arrange for purchase due to possible delays in delivery.
- Develop agenda for the upcoming BOM meeting.

### **October**

- Write check request for C.A.R. to be presented at BOM
- Attend Leadership in Louisville, KY
- Attend CoSP meetings
- Chair fall CASSAR BOM meeting
- Review financial reconciliation of BOM and transfer information to ongoing spreadsheet.
- Send results of Candidate Forum to immediate past President General (chair of the NSSAR Nominating Committee)

### **November**

- Invite national officers to annual meeting
- Write separate Veterans Day Message to be sent Nov 11
- Ensure reconciliation report is on track to be complete by end of year

### **December**

- Ensure reconciliation report is on track to be complete by end of year
- Track progress of Annual meeting planning.

### **January**

- Remind Compatriots of the need to plan attendance at the Spring Leadership meeting in Louisville.
- Remind Compatriots of the need to attend Congress in July.
- Track progress of Annual meeting planning.

**February**

- Richard Locke Award: Find out from the Secretary what four chapters have the most growth and prepare certificates and a check for \$250 each.
- Remind Area vice-presidents about the William R Furlong Awards submission to be made in March.
- Any proposed Bylaw changes need to be distributed before the end of the month to ensure the 30-day timeline.
- Decide on medals to be presented at annual meeting and arrange for purchase due to possible delays in delivery.
- Track progress of Annual meeting planning.

**March**

- Attend Leadership in Louisville
- Set up California Dinner for Thursday of Leadership
- Attend all Council of State Presidents meetings and remind immediate past president and EVP to also attend CoSP meetings.
- Oversee progress of State Annual Meeting
- Prepare certificates and medals for the upcoming Annual Meeting
- Work on CA SAR Outstanding Chapter Award
- Remind Program Chairs about getting reimbursed for contestants

**April**

- Oversee progress of State Annual Meeting
- Write a farewell speech
- Chair Annual State Meeting
- Remind EVP to begin thinking about committee chair appointments

## Chapter Level

Make extra effort to recognize new attendees. This cannot be stressed enough, so it bears repeating - they likely know very few members, so this extra effort will help in retaining them. Make them feel welcome.

The chapter is where the “rubber meets the road.” It is critical that members become involved in the operations of the chapter – as an officer, committee chair, or committee member. It is seen too often that 95 percent of the work is done by 5 percent of the members – and this is not sustainable, either for the chapter or the members, officers or committee chairs. Determining a new member’s interest early in their SAR “career” will help the chapter as well as helping fulfill any interests the new member might have. This should not be a one-time “check-in”, but should be an ongoing effort to develop potential committee chairs and officers.

It is the responsibility of ALL chapter members to help grow the membership. While new member growth is absolutely necessary, it’s even more critical that the chapters actively work on RETAINING those members. If members stop coming to meetings, the chapters ought to be asking why – and following up with them to encourage their participation. If chapter members fail to renew, a chapter officer (or state officer, as appropriate) should make personal contact (by phone or in person) to encourage them to reinstate their membership. Failure to follow up with the inactive members can result in the eventual demise of the chapter. It’s much easier to keep a member involved and active than it is to bring a new applicant on board and develop his application.

To put the above in perspective – over the period 2018-2023, approximately 15,000 compatriots within the NSSAR did not renew and were never reinstated. Over the period 2003-2023, about 42,000 compatriots did not renew and were never reinstated. It’s a simple matter to download a list of dropped members from the NSSAR blue database with a specified date range; this list can be used to initiate contact with the inactive members to encourage them to reinstate – or at least find out why they do not wish to reinstate their membership. Once that information is available, then the State Society/chapter should examine it and determine what, if any changes should be made in the programs. Retention of compatriots MUST be an ongoing effort for survival of the Society.

It should also be noted that the Society has reached over 38,600 members as of the end of 2025; this is a new high and can be attributed to the efforts of the Compatriots in our Society. Recruiting, retention and reinstatement CAN and WILL pay off!

Be aware of meeting/event times, deadlines and schedules – especially when interacting with other allied organizations (CAR, DAR, other genealogical heritage organizations).

The chapter should also endeavor to submit news items to the editor of the California Compatriot, as well as to local news agencies to increase the visibility of the organization in the community.

## **MEMBERSHIP**

In 2022, the Membership Committee of the National Society Sons of the American Revolution evaluated the issues facing membership growth at the National level. This led to a review of existing resources and creation of the *Recruitment, Retention and Reinstatement Guide (3-Rs Guide)*, and the *Member Questionnaire*. These were published in February 2023 and can be found on the NSSAR Membership Committee's web page and is updated every few years to stay focused on current trends. The 3-Rs Guide is being revised and expanded into three separate documents, covering recruitment, retention and reinstatement in more detail and can be found there. To minimize duplication, the membership-related resources previously included in this document have been removed.

Other membership-related resources have been developed by the NSSAR Membership Committee over the past five years for use by State societies, chapters and compatriots; see [www.sar.org/committees/membership-committee/](https://www.sar.org/committees/membership-committee/). Other membership-related resources are included on the following pages, along with references. Chapters and State Societies are all encouraged to make use of these resources.

Periodically, chapters and state societies should reach out to those members who have dropped from active membership in an effort to bring them back. Officers within the chapters and state societies can download a report of dropped members by going to the "blue database" and clicking on either the State or chapter dashboard links on the left side of the screen. Once there, then click on "Reports." One can then select one of eight different reports (including inactive members). This will allow one to download a \*.csv report that can be easily converted to Excel. States or chapters should follow up with inactive members on an ongoing basis to maximize recovery of members.

Note that an emphasis is often placed on recruiting of new members; however, this can backfire if the new compatriots are ignored, as they will eventually drift away from the Society and ultimately become inactive. The newer members, if mentored appropriately, are more than likely to become productive members at the chapter level, and then progress into more responsible positions at the state and national levels.

The NSSAR membership committee resources can be accessed via the following URL:  
**<https://www.sar.org/committees/membership-committee/>**

## MENTORING

One particularly critical issue is that of mentoring new members to ensure that they are aware of these programs, and that they are not ignored. Too often, new members are not made to feel welcome; as a result, the new member may become inactive and not renew his membership. Following is an outline of a Mentor program developed by the Membership Committee, as charged by former President General J. Michael Tomme.

### *The Basics*

*To understand what an SAR mentor program might include, we should define some terms first.*

*Mentor (noun) - an experienced and trusted adviser; (verb) - advise or train (someone, especially a younger colleague).*

*Mentorship is a relationship in which a more experienced or more knowledgeable person helps to guide a less experienced or less knowledgeable person. The mentor may be older or younger than the person being mentored, but she or he must have a certain area of expertise. It is a learning and development partnership between someone with vast experience and someone who wants to learn. Mentorship experience and relationship structure affect the "amount of psychosocial support, career guidance, role modeling, and communication that occurs in the mentoring relationships in which the protégés and mentors engaged.*

*Within the context of the Sons of the American Revolution and its recommending a Mentor within chapters, a Mentor would be:*

- A chapter member who would either volunteer or be assigned by the chapter to work with a new member to introduce, guide, and foster a long-term relationship with the new member.*
- Have a good understanding of the chapter's officers, committees, its activities, and goals.*
- May or may not be the 1st or 2nd line sponsor for the new member.*
- Should have sufficient time and energy to provide the needed support in the integrating the new member into the SAR.*



## *Role of the Mentor*

*Assuming the new member has at least some interest in learning about the S.A.R. (some don't) and his chapter, the focus should be on the neophyte's education and interest. This refers to ensuring the new member receives information regarding the S.A.R. in general and the chapter in particular, and is able to spark some interest in the new member remaining active and even becoming involved in the chapter. Therefore, the mentor must have sufficient knowledge regarding both the S.A.R. and the chapter along with a good degree of both communication skills and empathy to be effective. He should endeavor to become a friend, if he is not already, of the new member and tailor his guidance to the member's desire to learn and be involved. The mentor should presume the new member is interested and wants to be a part of the chapter.*

*It is recommended that chapters establish a formal mentorship program where the mentors receive instruction/training prior to being assigned to assist new members. In addition, the new member should be introduced to his member and encouraged to use him as a resource. This introduction should take place when the chapter is informed the new member is registered at National; it need not wait until the installation ceremony.*

*Ideally, the mentor relationship will continue a minimum of 4 years.*

*The mentor program is only one retention tool and should be used in conjunction with a formal welcome and introduction to the chapter along with an on-going sense of welcome and inclusion by the chapter's officers.*

## *Guidelines for Selecting Mentors*

*The lifeblood of chapters will be members who are willing to: take an active part in the leadership of the chapter, participate in the activities of the chapter, volunteer when called for and encourage others to get involved. Active, growing chapters require that more members are encouraged to become active and participate at some level in the chapter. If the chapter can enrich the experience of new members from day one, they are more likely to pay their dues and remain a member. Thus, retention of members requires that they be given good reason to remain a member.*

*There are members in chapters who have been active participants and are familiar with the goals and programs supported by the Sons of the American Revolution. A chapter can encourage future leadership and program support by assigning mentors to new members as they are approved. Good mentors will be able to use their experiences in The Sons of the American Revolution and its programs to identify the interests and life experiences of new members and be able to guide and encourage these new members toward maintaining their membership.*

*The best use of mentors will be to limit one mentor to each new member. However, this mentor could be assigned more than one new member. The following are suggestions for identifying experienced chapter members for the role of mentor.*

- *Possibly the first line sponsor*
- *Has risen through chapter officer ranks and is looking for additional challenges*
- *Is a longtime member*
- *Has a working knowledge of the Sons of the American Revolution and programs*
- *Understands the chapter officer positions, activities and committee roles*
- *Is comfortable working with people*
- *Has the time and energy to devote to guiding new members*
- *Could work with more than one new member if called on to do so*
- *Is familiar with the Mentorship Program*
- *Is typically willing to take on new duties and challenges*

*For states with an at large membership category, the State Society will identify mentors from the membership as they deem appropriate.*

#### *Why Mentors are Important*

*In addition to developing programs and strategies to promote new membership, the Membership Committee needs to ensure that retention of our members is a priority. Therefore, it is imperative that our chapters and societies promote the mentorship of new members and the Mentorship Program. The appointment of a mentor to ensure the new member is welcomed and integrated into the chapter should have a positive impact on retention and make the State Society more competitive for the Richard H. Thompson Jr Award which is presented at Congress to the State Society that has the smallest number of members dropped for non-payment of dues.*

The following page contains a checklist that can be used to help mentor a new compatriot:

### **Mentoring Program Checklist**

- \*Call the new member to welcome him (and his spouse/guest as appropriate)
- \*Invite him for coffee or other appropriate informal setting to discuss SAR activities
- \*Invite him to a meeting and explain expected attire
- \*Greet him at a meeting and sit with him to guide him through the rituals
- \*Explain the various programs SAR supports
- Offer him a ride to a meeting or SAR event
- Introduce him to the President and other officers
- Explain the basic duties of the officers just met
- Connect him with multiple members of the chapter each meeting
- Contact him between meetings (phone, breakfast, coffee, cocktails, etc....)
- Show him the SAR website and how to navigate it
- Show him the SAR Handbook and discuss
- Review basic SAR protocol
- Describe the SAR medals and how and when they are worn
- Learn his interests and skills then help him find a way to apply them in SAR
- Invite him to participate in a Color Guard action
- Invite him to present awards (Citizenship, youth related, flag certificates, etc.)
- Invite him to a DAR or CAR event
- Invite him to attend a state meeting
- Invite him to become an officer of the chapter after consistent participation

\*These are best done as close to his membership approval and induction as possible since this when he is most interested in the value of his membership. The Membership Committee suggests including his lady (if applicable) as much as possible and connecting her with the Ladies Auxiliary.

It should be noted that mentoring does NOT stop within the first few months or year. Since most membership drops occur within the first few years, it is advisable to continue the mentoring process for at least the first few years, starting with the initial meeting with the applicant and progressing through a few years after induction as a compatriot. More information on mentoring and onboarding can be found on the Membership Committee web page as part of the recruitment, retention and reinstatement resources.

## **TRAINING**

A series of training modules was developed during 2023-2024 and was eventually launched in early 2025. The earlier training modules could be accessed via the e-Learning page on the SAR website and the series of new training modules, known as *SAR University*., can be accessed via <https://www.sar.org/sar-university>.

It currently contains the following 24 training modules/subjects:

SAR Compatriot Training	SAR Blue Database	SAR Vice President General
SAR Youth Protection	The Effective Leader	Goal Setting/Action Plans
Patriotic Outreach	Presidential Duties	Presiding Over Meetings
Member Involvement	Chapter Activities	Chapter Reports
Vice President's Duties	Members Recruitment	Social Media/Communications
Leadership Development	Secretarial Duties	Correspondence & Newsletters
Treasurer's Duties	Legal Filing Requirements	Dues Collection and Reconciliation
Registrar's Duties	Chaplain's Duties	Historian's Duties

These are available for all members to take. Most modules run about 15-20 minutes each, with the registrar module taking much longer.