

**The California Society  
of the  
Sons of the American Revolution**



**President**

**Semi-Annual Report for the 144<sup>th</sup> Board of Managers Meeting**

**NSSAR National Leadership Meeting, Louisville, KY — February 26-29, 2020**

**NSSAR Council of State Presidents — August 22, 2020 Nominating Committee**

**CASSAR Annual Meeting, via Zoom — March 18, 2020**

**CASSAR Operating Committee, 1<sup>st</sup> Tuesday of every month (Elected Officers only)**

**Chapter Meetings:**

**Sacramento Chapter — 11 monthly meetings and 2 All-Hands Meetings, 2020**

**Gold Country Chapter, Auburn — February 15, 2020**

**Gold Country Chapter, Zoom — June 20, 2020**

**Gold Country Chapter, Zoom — July 20, 2020**

**Gold Country Chapter, Zoom — August 15, 2020**

**Harbor Chapter — September 3, 2020**

**Monterey Bay Chapter, Monterey — January 11, 2020 New Officer Installation**

**Mother Lode Chapter, Placerville — January 28, 2020 & February 25, 2020**

**Orange County Chapter, Santa Ana — October 10, 2020 Jim Blauer Memorial**

**Redlands Chapter, Zoom — June 20, 2020**

**Redwood Empire Chapter, Sonoma — February 21, 2020**

**Riverside Chapter — September 12, 2020**

**Thomas Jefferson Chapter, Concord — January 18, 2020 New Officer Installation**

**Thomas Jefferson Chapter, Zoom — June 27, 2020**

**Yosemite Chapter, Fresno — January 25, 2020**

**I participated in the following events:**

**Americanism Poster Contest Presentations:**

**Green Valley Elementary, Rescue — February 6, 2020 — 3 Classrooms**

**Newcastle Elementary School, Newcastle — February 6, 2020 — 3 Classrooms**

**Oak Chan Elementary, Folsom — February 6, 2020 — 3 Classrooms**

**Oak Chan Elementary, Folsom — May 19, 2020 — Chapter & CASSAR Winner Sydney Wilson**

**Sandra J Gallardo Elementary, Folsom — February 6, 2020 — 3 Classrooms**

**JROTC Presentation**

**Cadet Megan Lange, Casa Roble H.S. — May 29, 2020 Presentation of award**

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**Color Guard Events:**

**Freedoms Foundation Constitution Bowl — Roseville, CA — January 30, 2020**

**NRA Black Powder Certification — Sacramento, CA — January 28 & 29, 2020**

**Colonial Dames, Installation Dinner — March 6, 2020**

**Presidents Day Celebration — Orangevale, CA — February 17, 2020**

**Northern CA Veterans Cemetery, Igo, CA — May 25, 2020**

**National Color Guard Gold Medal, Presentation to Jim Fosdyck, October 10, 2020**

**Public Service Awards:**

**West Sacramento Police Department — July 28, 2020**

**Elk Grove Police Department — July 30, 2020**

**President's Annual Report continued:****Americanism Poster Contest Presentations – 2020**

**Oak Chan Elementary, Folsom — Sydney Wilson: Chapter Winner, CASSAR Winner, 3<sup>rd</sup> National**

**Flag Certificates (reported as of October 15, 2020)**

**Brookfields Restaurant, Sacramento, CA – March 18, 2020**

Respectfully,  
Donald B Littlefield  
President  
California SAR

**CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION**

**OFFICER REPORT**

**10/12/2020**

**EXECUTIVE VICE PRESIDENT**

Chapter meeting restrictions due to State and Local Covid 19 restrictions, has delayed the completion of my goal to visit each Chapter, so I appreciate invitations to visit your Chapters (even virtually) especially on special occasions. Please make sure your Chapter meeting information is updated and correctly posted on the State Website.

Since the virtual CASSAR April meeting, I have attended monthly virtual meetings of the CASSAR Operations Committee, in addition to the virtual Riverside Chapter and Board of Directors meetings. On October 10, 2020, I attended the SAR Memorial Service for Compatriot Jim Blauer held at the first in person meeting of the Orange County Chapter since April.

Planning is well underway for the next Annual Meeting of the Membership April 16 & 17, 2021 at the Mission Inn in Riverside, CA. Additional information is available on the CASSAR website and the California Compatriot Newsletter.

My duties also include the submission of a 2021 California Society Budget for approval by the Board of Managers in November, and the publication of the award-winning California Society Compatriot Newsletter. I hope you enjoyed the 2020 Spring and Summer Editions. The Winter Edition is due out in January so please send me photos and listings of your Chapter activities.

Respectfully Submitted,  
Brian Stephens



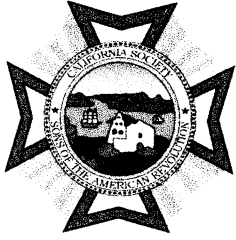
**California Society  
National Society Sons of the American Revolution  
Vice President - North  
145<sup>th</sup> Fall Board of Managers Meeting  
November 14, 2020**

The following is a list of my activities on behalf of the CASSAR for the past 6 months:

- I presented a JROTC award to a cadet at a virtual event at Pacific High School in Sacramento.
- I presented a Life Saving Medal to Officer Nolan McManus at the Woodland, CA Police Department.
- I presented a Law Enforcement Commendation Medal to Detective Kirk Leonard at the Yolo County Sheriff's Police Department.
- I participated in "period" uniform at the ceremony awarding the CASSAR Enhanced JROTC Award to Cadet Megan Lange.
- I presented a NSSAR Certificate of Patriotism to Sacramento Compatriot Ron Hollis for his service in the USAF in a virtual event.
- I participated in the virtual CASSAR Open Forum on membership dues hosted by CASSAR Secretary, Fred Schuster.
- I hosted six virtual meetings of the Sacramento Chapter membership.
- I published seven issues of the Sacramento Chapter Compatriot.
- I attended two virtual meetings at the Thomas Jefferson Chapter.

D. Craig Anderson  
Vice President-north  
California Society SAR  
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**The California Society of the  
Sons of the American Revolution  
VICE PRESIDENT – SOUTH  
OFFICER'S REPORT  
145<sup>th</sup> Fall Board of Managers Meeting  
November 14, 2020**

**JIM KLINGLER**  
*Vice President - South*  
Phone: (949) 854-7698  
Cell: (949) 300-3253  
klingler@sbcglobal.net

My thanks to the members of the California Society for your support in my election at the April 18, 2020 Annual Meeting to the position of Vice President – South. Unfortunately, the travel restrictions resulting from the COVID-19 pandemic have limited my attendance at Chapter meetings. I hope things will improve, and I can see all of you in person at a future chapter and state meeting.

My activities on behalf of CASSAR in the past 6 months listed below have been primarily virtual events with a few exceptions.

- Completed transition of my former duties as CASSAR Treasurer to John Ferris, including the filing of the CASSAR federal and state tax returns by the due date of July 15.
- Organized and participated in a joint SAR Color Guard event, attended by the Orange County and Harbor Chapters, at the Richard M. Nixon Library Independence Day celebration on July 4th. This event was covered by two local television stations which gave the SAR great visibility.
- Represented CASSAR Eagle Scout Program Chairman, William Nay, in presenting the Eagle Trophy in person along with Orange County Chapter President, Phil Mitchell, to the State winner of the 2019 Eagle Scout Contest, Michael McPhie on July 6. Michael also won First Place in the 2019 National Eagle Scout competition.
- Encouraged chapter attendance and participated in the virtual CASSAR Open Forum on membership dues hosted by CASSAR Secretary, Fred Schuster on September 5.
- Attended and participated in the Color Guard for the SAR Orange County Chapter Memorial Service for Compatriot Jim Blauer on October 10.

In addition, I served on the following committees for the National Society:

- As Chairman of the NSSAR Finance committee, I conducted a virtual Zoom meeting with the Finance, Budget, Investment and Audit committees on September 21. We reviewed the financial results of the SAR through 6 months, 2020 and the Budget for 2021.
- As Vice Chairman of the NSSAR Investment Committee, I participated in a meeting of the committee with Fifth Third Bank on September 3 to discuss investment allocation strategy for the SAR and SAR Foundation funds.
- Participated as a member of (1) the National Dues Billing Task Force with the objective of automating dues collection and reporting, and (2) the SAR Foundation Grant Research/Writing Committee to apply for grants for the SAR Education Center and Museum.

Respectfully Submitted,

*Jim Klingler*

## **California Society State Secretary**

April 1, 2020 to October 30, 2020

Reporting Date: September 20, 2020

Submitted by: State Secretary Fred Schuster

Prepared by: Frederick Schuster

### **Summary:**

The position of the state secretary has been busy working on getting the state files up to date, processing the transactions that have been coming in, sending out new member packets in 24 to 48 hours once they arrive at the desk of the secretary.

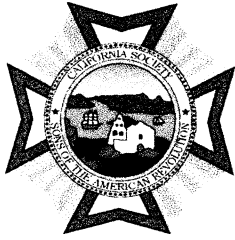
There have been a record number of reinstatement applications processed this year. Several members have requested transfers out of the state to other states.

Since August, the state secretary has been working on reconciling the state membership records with the National Data Base, preparing the 2020/2021 Chapter Reconciliation Reports and cleaning up the state roster.

The state secretary is hosting a ZOOM Teleconference Forum each month to cover various topic that may be of interest to the chapter secretaries, the first one was in September and the topic was the 2021 Reconciliation Report, the October meeting covered the Change of manager form and how to access and use the National Data Base yellow system. The topic for the November meeting has not been determined.

*Frederick A. Schuster*

California State Secretary



**The California Society**  
of the  
**Sons of the American Revolution**  
Instituted October 22, 1875  
Organized July 4, 1876, Incorporated February 17, 1890

**John R Ferris**  
**Treasurer**  
5 Libra Court  
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**TREASURER'S REPORT**  
**JANUARY 1 TO SEPTEMBER 30, 2020**  
**NINE-MONTHS ACTUAL COMPARED TO FULL-YEAR BUDGET**

The following are the operating receipts and expenses for the fiscal year ending September 30, 2020:

**INCOME STATEMENT**

	<b>9 Months 2020 <u>Actual</u></b>	<b>FY 2020 Annual <u>Budget</u></b>	<b>Variance <u>To Budget</u></b>
<b>RECEIPTS</b>			
I-01A · Annual Dues Received - CASSAR	\$ 24,615	\$ 25,000	\$ (385)
I-01B · Annual Dues Received - NSSAR	\$ 40,230	\$ 43,750	\$ (3,520)
I-03A · LM Annual CASSAR Dues (from Inv acct)	\$ 0	\$ 6,000	\$ (6,000)
I-03B · LM Annual NSSAR Dues (from Inv acct)	\$ 0	\$ 9,625	\$ (9,625)
I-04 · LM Dues for Chapters (from Inv acct)	\$ 0	\$ 3,000	\$ (3,000)
I-05 · New Member CASSAR Dues	\$ 2,840	\$ 3,000	\$ (160)
I-06 · Supplemental App State Fee	\$ 560	\$ 750	\$ (190)
I-08 · Bank Account Interest	\$ 1	\$ 10	\$ (9)
I-09 · Reinstated Member Fee	\$ 1,785	\$ 1,000	\$ 785
I-14 · Interest Income-San Diego Fund	\$ 816	\$ 1,600	\$ (784)
I-16 · New Life Member Dues	\$ 1,282	\$ 700	\$ 582
I-17 · Other Income	\$ 75	\$ 0	\$ 75
I-18 · Transfer From Education Fund	\$ 0	\$ 2,500	\$ (2,500)
I-19 · Transfer From Unallocated Fund	\$ 16,760	\$ 2,000	\$ 14,760
I-25 · Donations	\$ 6,392	\$ 1,000	\$ 5,392
I-45 · Sales of Congress Shirts	\$ 140	\$ 0	\$ 140
I-57 · California Medal Sets	\$ 35	\$ 1,750	\$ (1,715)
I-62 · Compatriot Subscription Fees	\$ 215	\$ 0	\$ 215
<b>Total Receipts</b>	<b><u>\$ 95,746</u></b>	<b><u>\$ 101,685</u></b>	<b><u>\$ (5,939)</u></b>

**Executive Committee Expenses**

A-01 · President Expenses	\$ 0	\$ 500	\$ (500)
A-02 · Executive VP Expenses	\$ 23	\$ 300	\$ (277)
A-03 · VP North Expenses	\$ 0	\$ 100	\$ (100)
A-04 · VP South Expenses	\$ 0	\$ 100	\$ (100)
A-05 · VP Membership Expenses	\$ 0	\$ 100	\$ (100)
A-06 · Executive Secretary Expenses	\$ 0	\$ 1,000	\$ (1,000)
A-07 · Treasurer Expenses	\$ 1,617	\$ 1,600	\$ 17
A-08 · Registrar Expenses	\$ 16	\$ 300	\$ (284)
A-09 · Genealogist Expenses	\$ 646	\$ 700	\$ (54)
A-11 · Chancellor Expenses	\$ 0	\$ 100	\$ (100)
A-12 · Historian Expenses	\$ 0	\$ 100	\$ (100)
A-14 · Chaplain Expenses	\$ 0	\$ 100	\$ (100)
A-15 · Surgeon Expenses	\$ 0	\$ 100	\$ (100)
<b>Total Exec. Committee Expenses</b>	<b><u>\$ 2,302</u></b>	<b><u>\$ 5,100</u></b>	<b><u>\$ (2,798)</u></b>

#### **Committee Expenses**

B-21 · Awards & Medals Committee Expenses	\$ 1,174	\$ 1,500	\$ (326)
B-22 · Best Chapter Contest Expenses	\$ 225	\$ 650	\$ (425)
B-24 · New Chapter Assistance Expenses	\$ 0	\$ 250	\$ (250)
B-27 · Poster Contest Expenses	\$ 925	\$ 1,200	\$ (275)
B-29 · Brochure Contest	\$ 1,071	\$ 1,200	\$ (129)
B-30 · Oration Contest	\$ 0	\$ 1,770	\$ (1,770)
B-33 · JROTC Committee Expenses	\$ 1,045	\$ 1,970	\$ (925)
B-34 · CAR Expenses	\$ 0	\$ 1,000	\$ (1,000)
B-35 · Eagle Scout Contest Expenses	\$ 1,000	\$ 1,970	\$ (970)
B-36 · Law Enforcement/Public Service Awards	\$ 0	\$ 750	\$ (750)
B-37 · DAR Liaison Expenses	\$ 0	\$ 250	\$ (250)
B-39 · Essay Contest Expenses	\$ 1,055	\$ 1,770	\$ (715)
B-40 · Travel Assistance for Contestants	\$ 0	\$ 1,400	\$ (1,400)
B-41 · Spring Meeting Allowance	\$ 0	\$ 500	\$ (500)
B-42 · Fall Meeting Allowance	\$ 0	\$ 500	\$ (500)
B-43 · Visiting PG Expenses	\$ 0	\$ 1,900	\$ (1,900)
B-44 · Sea Cadets Expenses	\$ 0	\$ 200	\$ (200)
B-60 · Valley Forge Contest Expenses	\$ 3,100	\$ 4,200	\$ (1,100)
B-70 · Richard F. Locke Award	\$ 1,000	\$ 1,250	\$ (250)
<b>Total Committee Expenses</b>	<b><u>\$ 10,595</u></b>	<b><u>\$ 24,230</u></b>	<b><u>\$ (13,635)</u></b>

#### **Program Expenses**

C-45 · California Compatriot Expenses	\$ 1,091	\$ 1,500	\$ (409)
C-49 · CASSAR Flag Expenses	\$ 0	\$ 150	\$ (150)
C-50 · Congress Hospitality Suite	\$ 0	\$ 750	\$ (750)
C-51 · Color Guard Cmdr Flags & Streamers	<u>\$ 0</u>	<u>\$ 1,250</u>	<u>\$ (1,250)</u>
<b>Total Program Expenses</b>	<b><u>\$ 1,091</u></b>	<b><u>\$ 3,650</u></b>	<b><u>\$ (2,559)</u></b>

**Other Operating Expenses**

E-01 · Annual Dues to NSSAR	\$ 50,840	\$ 53,375	\$ 2,535
E-02 · LM Dues to Chapters	\$ 2,980	\$ 3,000	\$ (20)
E-03 · Filing Fees	\$ 95	\$ 100	\$ (5)
E-10 · General Liability Insurance	\$ 0	\$ 365	\$ (365)
E-11 · D&O Liability Insurance	\$ 0	\$ 265	\$ (265)
E-25 · Software and Computer Supplies	\$ 0	\$ 0	\$ 0
E-30 · Storage Rent & Supplies	\$ 0	\$ 750	\$ (750)
E-40 · Other CASSAR Expenses	\$ 0	\$ 2,000	\$ (2,000)
E-55 · The SAR Foundation	\$ 17,760	\$ 1,000	\$ 16,760
E-70 · Communication Software	\$ 378	\$ 0	\$ 378
E-80 · Credit Card Fees	<u>\$ 0</u>	<u>\$ 25</u>	<u>\$ (25)</u>
<b>Total Other Operating Expenses</b>	<b><u>\$ 72,053</u></b>	<b><u>\$ 60,880</u></b>	<b><u>\$ 11,173</u></b>

<b>Total Operating Expenses</b>	<b><u>\$ 86,041</u></b>	<b><u>\$ 93,860</u></b>	<b><u>\$ (7,819)</u></b>
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<b>Net Operating Surplus/(Deficit)</b>	<b><u>\$ 9,705</u></b>	<b><u>\$ 7,825</u></b>	<b><u>\$ 1,880</u></b>
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**E-51 · Transfers to (from) Investment Accounts**

Congress Fund	\$ 0	\$ 2,000	\$ (2,000)
Education Fund	\$ 0	\$ 1,600	\$ (1,600)
Permanent Fund	\$ 0	\$ 1,750	\$ (1,750)
Life Member Fund – New Members	<u>\$ 0</u>	<u>\$ 700</u>	<u>\$ (700)</u>
<b>Total</b>	<b><u>\$ 0</u></b>	<b><u>\$ 6,050</u></b>	<b><u>\$ (6,050)</u></b>
<b>Net Surplus/(Deficit)</b>	<b><u>\$ 9,705</u></b>	<b><u>\$ 1,775</u></b>	<b><u>\$ 7,930</u></b>

Notes to Income Statement:

1. Receipts – Total receipts for the first 9 months of \$95,746 were \$(5,939), or 6%, below the annual budget, primarily due to: lower Annual Dues Received NSSAR \$(3,520) and transfers not completed from the Education Fund \$(2,500). Major variances to budget receipts were:
  - a. Receipts for NSSAR and CASSAR regular annual dues were below budget by \$3,905 due to fewer annual members than budgeted.
  - b. Transfers from the investment account for life member dues were below budget by \$(18,605) due to no transfers being made.
  - c. Receipts for donations exceeded budget by \$5,392 due to an unbudgeted donation from Intel of \$4,900.
2. Expenses – Total operating expenses for the first 9 months were over budget by \$7,819, primarily due to the SAR Foundation Donation of \$16,760 being over budget. An additional \$18,605 may be transferred from the Investment Accounts to Life Membership Dues accounts late this fiscal year to offset the corresponding expenses. Most of the committee and program expenses are under budget.
3. Transfers To (From) the Investment Account – Total transfers for the first 9 months of 2020 were zero. Annual transfers will be reviewed late this fiscal year to determine if necessary and to what amount to offset dues cost for life members to both the chapters and national.

## **BALANCE SHEET**

The Balance Sheet as of September 30, 2020 shows the following balances:

### **Assets:**

Cash and Savings Account – Bank of America	\$ 30,834
Investment Account – Morgan Stanley	\$458,095
Prepaid Expense – Deposit for BOM meeting	\$ 3,500
<b>Total Assets</b>	<b><u>\$492,429</u></b>

### **Equity:**

Equity Accounts	\$ 271,558
Retained Earnings	<u>\$ 220,871</u>
<b>Total Equity</b>	<b><u>\$ 492,429</u></b>

<b>Total Liabilities &amp; Equity</b>	<b><u>\$492,429</u></b>
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## **TREASURER ACTIVITIES – 2020**

### **Tax and Regulatory Agency Forms Filed for CASSAR (*previous Treasurer*)**

1. IRS Form 990-EZ with Schedules A, B and O
2. California Form 199 with 12 Attachments
3. IRS Forms 1099 and 1096 – For Youth Awards
4. California Form RRF-1 – Charitable Trust Registration
5. California Form CT-NRP-2 – Raffle Report
6. D&O and General Liability Insurance Policies with NIAC.

### **National Society Committees**

1. Audit Committee – (September 2020 – Present)
2. Oration Committee – (July 2018 – Present)

## Fall 2020 CASSAR Registrar Report

2020 Applications to date:

JM	23
Memorial	3
Regular	160
Supplemental	<u>90</u>
Total	282

\*Activity by Chapter:

Central Coast	5	Mother Lode	1	Sons of Liberty	9
Coachella Valley	16	Orange County	33	South Coast	26
Delta	6	Redlands	4	Thomas Jefferson	20
Eagle	7	Redwood Empire	13	Yosemite	11
Gen Patton	18	Riverside	8		
Gen Washington	11	Sacramento	20		
Gold Country	12	San Diego	13		
Harbor	9	San Francisco	0		
Kern	14	Santa Barbara	7		
Monterey Bay	1	Silicon Valley	13		

\*Cumulative total of JM, Regular, Memorial and Supplemental

We have a small number of applications that are pended. It would be very helpful for CASSAR that all effort is placed into resolving the reasons for applications being pended. Often they can be resolved quickly. It would be helpful if Chapter registrars reminded members that all applications come through you for any adjustments needed.

The CASSAR Application Checklist is extremely helpful in reviewing applications. Have generations been underlined in red ink and marked in the upper right hand of the page. Has the page been enlarged to a full sheet of paper.

In Pro Patria  
Owen Stiles



## **November 2020 Annual Report of the Genealogist, California State Society, Sons of the American Revolution, January 1 to November 10, 2020**

Reporting Date: October 9, 2020  
Submitted By: CASSAR Genealogist, Terry Briggs  
Prepared by: CASSAR Genealogist, Terry Briggs

### **CASSAR Genealogist serves as a resource to CASSAR and chapter Registrars**

The CASSAR Genealogist continues to serve and be available as a resource to CASSAR and CASSAR chapter Registrars. The CASSAR Genealogist has provided information to continuing and new chapter Registrars intended to facilitate the effective implementation of the CASSAR application process and the preparation of successful SAR applications leading to approvals of those applications.

### **CASSAR Pended Applications Monitoring and Reporting**

In 2020 the CASSAR Genealogist has continued monitoring and weekly reporting of the number of pended CASSAR applications. During 2020 CASSAR has had, at any one time, 7 to 22 pended applications. CASSAR needs to continue to reduce the number of pended past applications and minimize the number of pended applications in the future. In 2020 the CASSAR Genealogist published and distributed regular updates to a list of CASSAR pended applications for reference and use by the CASSAR President, the CASSAR Registrar and other CASSAR officers. The Genealogist has contacted CASSAR chapter registrars regarding pended applications from their chapters and encouraged the resolution or withdrawal of pended applications. The CASSAR Genealogist has also reviewed a number of pended applications brought to him by chapter Registrars and has provided interpretations and suggestions toward resolution or withdrawal of those pended applications. Also directed toward reducing the number of CASSAR pended applications, the Genealogist has provided reviews of draft applications online at the request of CASSAR chapter Registrars prior to finalization and submittal and provided recommendations to proceed with submittal and/or comments for additional work on applications before those applications are submitted to the CASSAR Registrar.

As a reminder to all chapter Registrars, applications that have been pended more than 3 years cannot be acted upon by the NSSAR genealogists. The chapter Registrars should instruct the CASSAR Registrar to direct the NSSAR to either shred those pended application files or to return the pended application file documentation to the chapter Registrar at the chapter's expense.

### **SAR Patriot Research System Implementation**

The CASSAR Genealogist is also currently serving as the CASSAR SAR Patriot Research System (SAR PRS) Volunteers Coordinator. The SAR PRS is the SAR's current free online equivalent to the free online DAR Genealogical Research System (DAR GRS). The SAR PRS provides information about SAR patriot ancestors and post 1984 SAR member lineages to their patriot ancestors as previously documented on post 1984 SAR record copies.

At present about 52% (about 4,060) of the approximately 7,900 total CASSAR post 1984 lineages have been entered into the SAR PRS by about 30 CASSAR data entry volunteers. Data entry for each lineage takes approximately 30 minutes and requires another 15 minutes to review and publish to the SAR PRS. SAR PRS volunteers who contribute 40 hours or more of volunteer

time are awarded the SAR Lafayette Volunteer Service Medal and each additional 40 hours of volunteer time earns a bronze oak leaf for the medal.

Approximately 100% of the Eagle, Coachella Valley, South Coast, Orange County, Harbor, Santa Barbara, Central Coast, Monterey Bay, Silicon Valley, Delta, Yosemite, Redwood Empire, Mother Lode, Gold Country, General George Washington and former Butte and Redding Chapters' post 1984 record copies have been entered into the SAR PRS. Chapters with record copy data entry remaining to be completed are San Diego, Riverside, Redlands, Sons of Liberty, General George Patton, Kern, San Francisco, and Sacramento.

This work is ongoing and additional CASSAR data entry volunteers would be welcomed. If interested in volunteering, please contact Terry Briggs.

### **NSSAR Online Application Form Data Entry System use and implementation**

During 2020 the CASSAR Genealogist has actively used, monitored and promoted the use of the NSSAR Online Application Form Data Entry System to all CASSAR Registrars for use in the preparation of all CASSAR applications including new member and new Junior Member applications and for preparation of Memorial applications and Supplemental Patriot Ancestor applications. As of this date, **all** of the CASSAR chapters that submit applications for review are using the SAR Online Application System to prepare SAR application forms. The CASSAR Genealogist has also served as a resource to CASSAR chapter Registrars to answer questions about the use of the SAR Online Application System and to resolve specific user issues.

As of October 8, 2020 and since the Fall of 2015, approximately 2,990 CASSAR applications have been started in the SAR Online Application System and approximately 1,190 applications have been approved for application forms created and printed using the SAR Online Application System.

All chapter Registrars should be checking their Online System "Chapter Dashboards" to view new applications started by applicants themselves in the Online System. Chapter Registrars should immediately contact applicants starting applications to provide the applicants information about the SAR, the SAR application process, the SAR application requirements and to provide coordination and guidance for completing and submitting SAR applications. It appears that a number of CASSAR chapters are not regularly checking applicant started applications in the SAR Online Application System.

### **SAR Applications Must be Closely Reviewed by Chapter Registrars**

Before applications are submitted to the CASSAR Registrar, chapter Registrars should perform a thorough review and verification of **all** applications, new **and supplemental**, to confirm that the applications are complete and conform to SAR application standards, to confirm that the correct check amounts accompany the applications, that there is SAR acceptable supporting documentation to confirm all child-to-parent relationships in the direct ancestral line from the applicant to their patriot ancestor and that there is SAR acceptable supporting documentation to confirm the patriotic service of the patriot ancestor.

Chapter registrars should take the time to become very familiar with the most current *NSSAR Genealogy Committee Policies Manual* and the most current *NSSAR Application Preparation Manual*, both of which can easily be downloaded from the NSSAR web-site. Registrars should carefully review and understand the Genealogy Committee Policies. With the cooperation of all CASSAR chapter Registrars, the CASSAR should see a reduction in CASSAR pending applications in the future.

**CASSAR Surgeon**  
**Matthew S. Bowdish, MD, FAAAAI, FACAAI**

The main role of the surgeon for the California society in the last 6 months has been to primarily assist the president and board related to the SARS-CoV-2 (COVID-19) Pandemic. I have given recommendations both from a medical and public health standpoint for a variety of California Society activities. I have addressed the Sacramento Chapter on a couple of occasions related to the same. While I may have personal views that differ from aspects of the advice given by regulatory agencies, I have attempted to give the most current scientific consensus advice as well as convey public health edicts from the California Department of Public Health as well as national and local public health agencies. I have worked with the Surgeon of the NSSAR to develop recommendations on a national scale. I have given my talk on the "Medical History of George Washington" on one occasion in the last year. I also plan to speak to the Gold Country Chapter this weekend via Zoom conferencing related to DNA and genealogy. Since we have not met in person for quite some time I have not received any requests for personal medical advice from fellow compatriots. I stand willing to give professional advice to the Society when needed and in accordance with current public health guidelines.

Matthew S. Bowdish, MD, FAAAAI, FACAAI  
CASSAR Surgeon



# **TRUSTEES of the CASSAR INVESTED FUNDS**

## **CASSAR Annual Meeting**

**October 8, 2020**

The elected Trustees of the CASSAR Invested Funds are Chairman Stephen R. Renouf (2020-2023), John L. Dodd (2018-2021), and M. Kent Gregory (2019-2022). The Trustees of the Invested Funds operate under CASSAR Bylaw No. 4, Section 12.

The CASSAR Invested Funds are invested with Morgan Stanley Smith Barney (MSSB) in five separate funds: the Life Membership Fund, the Education Fund, the Permanent Fund, the Congress Fund, and the Unallocated Fund. The signers on the account are the three trustees.

The beginning value of the Invested Fund on October 1, 2019:  
**\$450,059.06.**

The ending value of the Invested Fund on September 30, 2020:  
**\$458,095.14.**

During the 12-month period described above, the accounts increased **\$8,036.08** in value. The increase was the surplus of our net returns over the \$16,760 we withdrew in February 2020 for the SAR Education Center & Museum donation.

## **LIFE MEMBERSHIP FUND**

The purpose of the Life Membership Fund is to maintain the life memberships purchased by the regular members of this society. The Fund is invested with the goal of achieving a return of 6.1% (net of fees) to cover the national, state and chapter dues for members of the CASSAR life membership program. The principal and income from this fund shall be distributed to the treasurer annually and deposited into the general funds of the society to cover the annual dues of the life members. This fund is governed by CASSAR Bylaw No. 9, Section 5.

Fund Investment as of September 30, 2020:

### **LIFE MEMBER. FUND: \$171,765.78**

Cash	\$13,333.62	7.76%
Equities	\$93,026.33	54.16%
Fixed Income	\$56,271.73	32.76%
Alternatives	\$9,134.10	5.32%

**Return: 6.24% Last 12 Months; 3.33% Since Inception (on 6/22/2004)**

Allocations:	ACTUAL	TARGET
<b>Cash</b>		
Global Cash	7.76%	7.00%
<b>Equities</b>		
US Large Cap Growth	16.70%	12.00%
US Large Cap Value	14.42%	14.00%
US Small Cap Growth	5.55%	5.00%
US Large Cap Value	5.55%	4.00%
International Equities	8.55%	7.00%
Emerging Markets Equities	3.39%	3.00%
<b>Fixed Income</b>		
Short Term Fixed Income	21.78%	25.00%
US Taxable Core	10.98%	18.00%
<b>Other</b>		
REITs	1.84%	2.00%
Commodities	3.48%	3.00%

Account Risk Profile: **4\*** (1-most conservative to 5-most aggressive).

\* Currently at 3

## **EDUCATION FUND**

The purpose of the Education Fund is to maintain all moneys or property, real or personal, which may accrue to this society by donation, gift, devise, bequest or otherwise that is designated for the education fund or solely for educational purposes. The principal and income from this fund shall be distributed by the board exclusively for educational purposes. This fund is governed by CASSAR Bylaw No. 9, Section 2.

Fund Investment as of September 30, 2020:

<b>EDUCATION FUND:</b>	<b>\$64,672.19</b>	
Cash	<b>\$4,505.17</b>	<b>6.97%</b>
Equities	<b>\$31,033.54</b>	<b>47.99%</b>
Fixed Income	<b>\$25,633.27</b>	<b>39.64%</b>
Alternatives	<b>\$3,500.21</b>	<b>5.41%</b>

**Return: 4.94% Last 12 Months; 4.75% Since Inception (on 10/6/2010)**

Allocations:	ACTUAL	TARGET
<b>Cash</b>		
Global Cash	6.97%	7.00%
<b>Equities</b>		
US Large Cap Growth	14.10%	12.00%
US Large Cap Value	13.30%	14.00%
US Small Cap Growth	3.11%	5.00%
US Small Cap Value	7.00%	4.00%
International Equities	7.61%	7.00%
Emerging Markets Equities	2.86%	3.00%
<b>Fixed Income</b>		
Short Term Fixed Income	23.26%	25.00%
US Taxable Core	16.38%	18.00%
<b>Other</b>		
REITs	1.81%	2.00%
Commodities	3.60%	3.00%

Account Risk Profile: **4\*** (1-most conservative to 5-most aggressive).

\* Currently at 3

## **PERMANENT FUND**

The purpose of the Permanent Fund is to insure the stability and perpetuity of this society. The Permanent Fund maintains all moneys or property, real or personal, which may accrue to this society by donation, gift, devise, bequest or otherwise, unless use thereof is otherwise designated as a condition to receipt or is otherwise directed by a majority vote of the board with at least three-quarters of the members of the board present and voting. The annual income from the permanent fund shall be accumulated and one-half shall be transferred to the Unallocated Fund and one-half shall be reinvested in the Permanent Fund at the beginning of each fiscal year. This fund is governed by CASSAR Bylaw No. 9, Section 1.

Fund Investment as of September 30, 2020:

<b>PERMANENT FUND:</b>	<b>\$107,403.91</b>	
Cash	<b>\$5,370.48</b>	<b>6.25%</b>
Equities	<b>\$69,271.65</b>	<b>61.12%</b>
Fixed Income	<b>\$22,604.15</b>	<b>23.75%</b>
Alternatives	<b>\$10,157.63</b>	<b>8.88%</b>

**Return: 5.49% Last 12 Months; 5.89% Since Inception (on 10/6/2010)**

Allocations:	ACTUAL	TARGET
<b>Cash</b>		
Global Cash	5.00%	5.00%
<b>Equities</b>		
US Large Cap Growth	17.67%	17.00%
US Large Cap Value	17.68%	21.00%
US Small Cap Growth	2.95%	5.00%
US Small Cap Value	7.42%	5.00%
International Equities	15.30%	14.00%
Emerging Markets Equities	3.47%	4.00%
<b>Fixed Income</b>		
Short Term Fixed Income	12.78%	9.00%
US Taxable Core	8.27%	10.00%
<b>Other</b>		
REITs	4.71%	7.00%
Commodities	4.75%	3.00%

Account Risk Profile: **4** (1-most conservative to 5-most aggressive).

## **CONGRESS FUND**

The purpose of the Congress Fund is to meet the obligations of a host society whenever the Society hosts the Annual Congress of the Sons of the American Revolution. The congress fund shall comprise all moneys or property, real or personal, which may accrue to this society by donation, gift, devise, bequest or otherwise that is designated for the congress fund or allocated to the fund in the annual society budget. The principal and income from this fund shall be distributed by the congress planning committee exclusively for host society expenses in connection with the society hosting the Annual Congress of the Sons of the American Revolution. This fund is governed by CASSAR Bylaw No. 9, Section 3.

Fund Investment as of September 30, 2020:

<b>CONGRESS FUND:</b>	<b>\$16,354.16</b>	
<b>Cash</b>	<b>\$812.42</b>	<b>4.97%</b>
<b>Equities</b>	<b>\$10,398.70</b>	<b>63.58%</b>
<b>Fixed Income</b>	<b>\$3,664.91</b>	<b>22.41%</b>
<b>Alternatives</b>	<b>\$1,478.13</b>	<b>9.04%</b>

**Return: 2.83% Since Inception (on 11/22/2019)**

Allocations:	ACTUAL	TARGET
<b>Cash</b>		
Global Cash	4.97%	5.00%
<b>Equities</b>		
US Large Cap Growth	17.14%	17.00%
US Large Cap Value	16.63%	21.00%
US Small Cap Growth	3.02%	5.00%
US Small Cap Value	7.76%	5.00%
International Equities	14.80%	14.00%
Emerging Markets Equities	4.23%	4.00%
<b>Fixed Income</b>		
Short Term Fixed Income	13.57%	9.00%
US Taxable Core	8.84%	10.00%
<b>Other</b>		
REITs	4.40%	7.00%
Commodities	4.64%	3.00%

Account Risk Profile: **4** (1-most conservative to 5-most aggressive).



## **UNALLOCATED FUND**

The purpose of the Unallocated Fund is to invest the funds of the Society that are not allocated to one of the other invested fund accounts and are not needed for the current expenses of the society. The principal and income from this fund shall be distributed to the treasurer upon his request and deposited into the general funds of the society to meet the current expenses of the society. This fund is governed by CASSAR Bylaw No. 9, Section 4.

Fund Investment as of September 30, 2020:

### **UNALLOCATED FUND: \$97,899.10**

Cash	<b>\$16,619.08</b>	<b>16.98%</b>
Equities	<b>\$31,862.53</b>	<b>32.55%</b>
Fixed Income	<b>\$49,417.49</b>	<b>50.48%</b>
Alternatives	<b>\$0.00</b>	<b>0.00%</b>

**Return: 5.82% Last 12 Months; 3.68% Since Inception (on 7/14/2015)**

Allocations:	ACTUAL	TARGET
<b>Cash</b>		
Global Cash	16.98%	18.00%
<b>Equities</b>		
US Large Cap Growth	8.47%	7.00%
US Large Cap Value	6.84%	7.00%
US Mid Cap Growth	1.33%	1.00%
US Mid Cap Value	1.29%	1.00%
US Small Cap Growth	1.30%	1.00%
US Small Cap Value	1.01%	1.00%
International Equities	8.95%	8.00%
Emerging Markets Equities	3.36%	3.00%
<b>Fixed Income</b>		
Short Term Fixed Income	20.10%	21.00%
US Taxable Core	19.67%	21.00%
International Core Fixed Income	4.73%	5.00%
Inflation Linked Securities	1.91%	2.00%
High Yield Fixed Income	2.00%	2.00%
Emerging Market Fixed Income	2.07%	2.00%
<b>Other</b>		
REITs	0.00%	0.00%
Commodities	0.00%	0.00%

Account Risk Profile: **3\* (1-most conservative to 5-most aggressive).**

\* Currently at 2

## **RECENT ACTIVITY.**

After the stock market correction at the end of February 2020, the Trustees had a conference call with the Morgan Stanley advisor to discuss the invested funds on March 6, 2020. He said the market volatility this year has been caused by uncertainty with the election year, as well as uncertainty with the Wuhan coronavirus disrupting supply chains in China and other parts of the world. The market was then down from its recent record highs, and the volatility would likely continue over the next few months. With our long-term funds, the advisor recommended increasing our risk profiles to enhance our returns – making all funds have a Risk Profile of 4 (except the Unallocated Fund, with a Risk Profile of 3).

On April 18, 2020, the CASSAR Annual Meeting was held by Zoom Meeting. The California Society voted to approve the Risk Profile changes recommended by the Morgan Stanley advisor, subject to his recommendation as the best time to implement the changes.

On April 30, 2020, the Trustees had a conference call with the Morgan Stanley advisor to discuss the recently approved changes to the Risk Factor of the invested funds. He did not think that the market was done with volatility, and he recommended waiting. He felt there would be another spike in volatility due to the Market not pricing in the reduction in consumer spending, debt issues to work through, and the large spike in the Federal debt potentially leading to high inflation. He believed the return to normal earnings would not occur until 2022. The trustees voted 3-0 to wait for a spike in volatility before increasing our Risk Factor. The advisor said he would call us when he sees an opportunity for making the change.

On October 1, 2020, the Trustees had a conference call with the Morgan Stanley advisor to discuss changing the Risk Factor of the invested funds. He said there has been an uneven recovery since March, with tech stocks doing very well, but many other sectors recovering slowly. He thinks this will even out once there is a Wuhan virus vaccine, and the economy comes back. There is currently a lot of uncertainty (and volatility) over the upcoming election – both who will win, and if there will be a winner on election night. He recommended waiting before changing the risk fact until the market becomes less volatile. He also recommended changing the commodity allocation to move from oil (which has been hit hard) to gold, or other commodities. The Trustees set up a call with the Advisor for November 12, 2020 – after the election, and before the Board of Managers Meeting. We will verbally report on this call at the Board of Managers Meeting.

## **Trustee Management.**

Your Trustees have continued their tripartite management style and are continuing to act cautiously in management of the Invested Fund. Accordingly, the Trustees will continue to move forward with moderate to conservative management in the best interests of the Society.

## Report of CASSAR Trustees October 2020

### **Trustees' Statement.**

The trustees reiterate their pledge to the membership that their activities and management of the CASSAR Invested Fund will be transparent to the membership. No actions will or have been taken by the present Trustees without the full participation of all Trustees.

**FOR THE TRUSTEES**

S/  
Stephen R. Renouf  
Chairman  
2020-2023

S/  
John L. Dodd, Esq.  
Trustee  
2018-2021

S/  
M. Kent Gregory  
Trustee  
2019-2022

## **NSSAR TRUSTEE REPORT (California)**

January 1, 2020 to December 31, 2020

Reporting Date: October 12, 2020

Submitted/Prepared by: Derek J. Brown, Trustee 2019-2021

### **Trustee's Report Summary:**

#### **NSSAR**

- Attended SAR Spring 2020 Leadership meeting in Louisville
- Attended SAR Fall 2020 Leadership meeting via Zoom
- Attended multiple EXCOM conference calls during the year via Zoom
- Attended SAR Trustee meetings in May, July, August and September 2020 via Zoom
- Attended NSSAR committee meetings for Membership, Headquarters and Maintenance, and the Public Service and Heroism Committees via Zoom
- Attended Hawai'i State Society Executive Board meeting in October via Zoom
- Developed a new member manual as part of a NSSAR Membership Committee subcommittee and released in August 2020. The manual was subsequently distributed to the CASSAR officers and chapter presidents
- Continuing as trustee for 2020-2021 (2<sup>nd</sup> year) due to COVID-19
- Continuing as Inspector General for NSSAR (2<sup>nd</sup> year)

#### **CASSAR**

- Attended CASSAR Spring 2020 meeting via Zoom
- Scheduled to attend CASSAR Fall 2020 BOM meeting via Zoom

#### **Chapter**

- Attended chapter meetings for the Thomas Jefferson, General George Washington, San Francisco and Orange County chapters
- Elected as registrar for TJ Chapter; 18 new member applications submitted to the State Registrar/NSSAR during 2020 as of Oct 12

#### **Other**

- SAR – Dual member, Nevada and Hawai'i State Societies
- DAR – Essay judge (Jose Maria Amador chapter DAR)
- CAR – Audit committee member (California CAR state society books)

Respectfully Submitted,

Derek J. Brown, PE

Trustee, California (2019-2021)

# Proposed Budget

	2020 BUDGET TOTAL	2021 OPERATING FUNDS	2021 PASS THRU FUNDS	FY 2021 BUDGET PROPOSAL
<b>REVENUE</b>				
I-01A · Annual CASSAR Dues Received	25,000	23,860		23,860
I-01B · Annual NSSAR Dues Received	43,750		42,350	42,350
I-03 · LM Annual CASSAR Dues(from Inv acct)	6,000	5,700		5,700
I-03 · LM Annual NSSAR Dues(from Inv acct)	9,625		8,925	8,925
I-04 · LM Dues for Chapters (from Inv acct)	3,000		2,850	2,850
I-05 · New Member CASSAR Dues	3,000	3,600		3,600
I-06 · Supplemental App State Fee	750	850		850
I-08 · Bank Account Interest	10	10		10
I-09 · Reinstated Member Fee	1,000	4,280		4,280
I-14 · Interest Income-San Diego Fund	1,600		1,600	1,600
I-16 · New Life Member Fees	700		700	700
I-17 · Income from Other Sources	0	140		140
I-18 · TRNSF FM EDUCATION FND	2,500		2,500	2,500
I-19 TRNSF FM UNALLOC FUND	2,000	2,000		2,000
I-21 · Income from Medals & Certs	0	0		0
I-25 · Donations	1,000	1,000		1,000
I-57 · Sale of CASSAR Medal sets	1750		350	350
I-62 Compatriot Subscription Fees	0	264		264
<b>TOTAL REVENUE</b>	<b>101,685</b>	<b>41,704</b>	<b>59,275</b>	<b>100,979</b>

## EXPENSES

### Officer Expenses

A-01 · President Expenses	500	500		500
A-02 · Executive VP Expenses	300	300		300
A-03 · VP North Expenses	100	100		100
A-04 · VP South Expenses	100	100		100
A-05 · VP-Membership Expenses	1,000	1000		1,000
A-06 · Secretary Expenses	1,600	1600		1,600
A-07 · Treasurer Expenses	300	300		300
A-08 · Registrar Expenses	700	700		700
A-09 · Genealogist Expenses	100	100		100
A-11 · Chancellor Expenses	100	100		100
A-12 · Historian Expenses	100	100		100
A-14 · Chaplain	100	100		100
A-15 · Surgeon Expenses	100	100		100
<b>Total Officer Expenses</b>	<b>5,100</b>	<b>5,100</b>	<b>0</b>	<b>5,100</b>

### Committee Expenses

B-21 · Awards & Medals Com Exp	1,500	1,500		1,500
B-22 · Best Chapter Contest Exp	650	650		650
B-24 · New Chapter Assistance Exp	250	250		250
B-27 · Poster Contest Expenses	1,200	1,000	200	1,200
B-29 · Brochure Contest	1,200	1,000	200	1,200
B-30 · Oration Contest	1,770	1,770		1,770

## **CHANGES FROM 2020**

1-01A-Revenue section updated with current membership information

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B-33 · JROTC Comittee Exp	1,970	1,770	200	1,970
B-34 · CAR Expenses	1,000	1,000		1,000
B-35 · Eagle Scout Contest Exp	1,970	1,770	200	1,970
B-36 · Law Enforcement/Public Service	750	750		750
B-37 · DAR Liaison Expenses	250	250		250
B-39 · Essay Contest Expenses	1,770	1,770		1,770
B-40 · Travel Assistance for Contestants	1,400		1,400	1,400
B-41 · Spring Meeting Allowance	500	500		500
B-42 · Fall Meeting Allowance	500	500		500
B-43 · Visiting PG Expenses	1,900	1,900		1,900
B-44 · Sea Cadets	1,200	1,200		1,200
B-60 · Valley Forge Contest Exp	4,200	3,900	300	4,200
B-70 · Richard F. Locke Award	1,250	1,250		1,250
<b>Total Committee Expenses</b>	<b>25,230</b>	<b>22,730</b>	<b>2,500</b>	<b>25,230</b>

#### Program Expenses

C-45 · California Compatriot Exp	1,500	1,600		1,600
C-49 · CASSAR Flag Expenses	150	150		150
C-50 · Congress Hospitality Suite	750	750		750
C-51 · C/G Cmdr Flags & Streamers Expenses	1,250	1,250		1,250
<b>Total Program Expenses</b>	<b>3,650</b>	<b>3,750</b>	<b>0</b>	<b>3,750</b>

#### Operating Expenses

E-01 · Annual Dues to NSSAR	53,375		51,275	51,275
E-02 · LM Dues to Chapters	3,000		2,850	2,850
E-03 · Filing Fees	100	100		100
E-10 · Liability Insurance Expenses	365	365		365
E-11 D & O Insurance	265	265		265
E-25 Software & Computer Supplies	0	0		0
E-30 · File Storage Rent & Supplies	750	750		750
E-31 Cloud Storage Fees	200	200		200
E-40 · Other CASSAR Expenses	2,000	2000		2,000
E-55 · The SAR Foundation(E-55)	1,000	0		0
E-70 Communications Software	300	600		600
E-80 · Credit Card Processing Fees	25	25		25
T-10 State & Federal Taxes	0	0		0
<b>Total Operating Expenses</b>	<b>61,380</b>	<b>4,305</b>	<b>54,125</b>	<b>58,430</b>

<b>TOTAL EXPENSES</b>	<b>95,360</b>	<b>35,885</b>	<b>56,625</b>	<b>92,510</b>
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#### E-51 · Transfers to Invest Accounts

Congress Fund	2,000	2,000		2,000
SD Education Fund	1,600		1,600	1,600
Permanent Fund	1,750		350	350
Life Member Fund - \$2 LM Subsidy	0	2,956		2,956
Life Member Fund - New members	700		700	700
<b>Total Transfers</b>	<b>6,050</b>	<b>4,956</b>	<b>2,650</b>	<b>7,606</b>

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C-45 \$100 added for increased formatting costs

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E-31 New Account

E-55 We prepaid 16 year's worth in 2020. We can zero this out.

E-70 Increase of \$300 for Constant Contact.

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Life Member Fund We raised dues in 2012 by \$2 to shore up LM Fund - Missing from budget

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NET SURPLUS/(DEFICIT)	275	863	0	863
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**2021 Budget Assumptions**

I-01A based on current 1834 members, minus 119 jr members, minus 285 life members-minus 237 drops = 1193

I-01B based on current 1834 members, minus 119 jr members, minus 285 life members-minus 237 drops = 1193

I-03 & E-02 There are 255 Regular Life Members (N,S,C), 30 Dual Members (S,C), and 20 Emeritus Members (\$0)

I-05 based on 180 new regular members

I-06 based on 85 supplementals

I-09 based on 214 reinstated members

I-62 based on 11 subscription fees of \$24

E-01 based on I-01B+I-03=1,448 x \$35 & 119 x \$5

2021 Draft Budget Submitted for approval at Fall BOM

## **Bylaws Committee**

Date of Report: October 8, 2020

Submitted by: Chairman Stephen Renouf, John Dodd & Donald Littlefield

### **Report:**

The Bylaws Committee is tasked with reviewing proposed amendments to the Bylaws and Article of Incorporation, making a recommendation on the proposed amendments, and ensuring they are properly noticed prior to the meeting at which they are voted upon.

As of this date, there are no proposed amendments for the Fall Board of Managers Meeting.

If you have any proposed amendments, submit them to the committee with enough lead time for the committee to review and have them properly noticed prior to the meeting that they will be voted upon.

## **Handbook Committee**

Date of Report: October 8, 2020

Submitted by: Chairman Stephen Renouf

### **Report:**

The Handbook Committee is tasked with ensuring that the Bylaws and Articles of Incorporation are up-to-date, and posted on the CASSAR Website.

The latest versions of the Bylaws (April 2020), and the Articles of Incorporation (April 2018) are on the CASSAR Website, [www.CaliforniaSAR.org](http://www.CaliforniaSAR.org), on the "Members Section" Tab. If you select "About California SAR," you will see:

Articles of Incorporation *(Updated April 2018)*

Bylaws *(Updated April 2020)*

Whistleblower Policy

Conflict of Interest / Code of Organizational Conduct

List of the Presidents of the California SAR *(Updated 9/14/20)*

California Members Serving on National SAR Committees *(Updated 11/20/19)*

**CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION**  
**COMMITTEE REPORT**  
**10/12/2020**  
**DAR LIAISON COMMITTEE**

The SAR - Daughters of the American Revolution (DAR) Award was authorized in 1990, it is presented annually to the DAR State or International Society that recruits the highest number of new members to the Sons of the American Revolution (SAR). The competition runs from January 1 to December 31 of each year. In order to be counted, a "DAR Finder Form" must be attached to the application packet. The SAR Staff Registrar uses these forms to determine the winner. Applications without the form cannot be counted toward the competition. A separate form must be included with each application received and will be counted toward the contest after the application is approved. Multiple applications cannot be applied to one form.

The NSSAR annually awards \$1,200 in cash prizes to State DAR Societies for first (\$300), second (\$200), and third (\$100) place in two categories. The highest number of referrals; and largest percentage of referrals based on the number of state members.

At last year's Fall BOM a motion was passed to award the DAR Medal of Appreciation for 5 referrals (with an oak leaf cluster for additional batches of 5 referrals), the Martha Washington Medal for 20 referrals, and the Daughters of Liberty Medal for 50 referrals.

In 2019, California tied for 5<sup>th</sup> place nationally with 32 DAR Finder Forms submitted and Linda Adams wife of the Kern Chapter Registrar Terry Adams was awarded a Martha Washington Oak Leaf Cluster for 21 Finder Forms.

In 2020, California has submitted 18 Finder Forms year to date, a 56% decrease from last year.

The DAR Finder Form is available on the CASSAR website.

Since the virtual CASSAR April meeting, I have attended the virtual DAR Continental Congress in June, and the virtual NSSAR DAR Liaison Committee held on September 25, 2020.

Respectfully Submitted,  
Brian Stephens

# **The California Society of the Sons of the American Revolution Chief of Protocol Mid-Year Report**

***For January 1, 2020 to June 30, 2020***

Reporting Period: January 1, 2020 to June 30, 2020

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The primary duties of the Chief of Protocol are:

1. Meet and greet distinguished guests attending California Society of the Sons of the American Revolution Spring and Fall Meetings of the Membership and other events hosted by the California Society President, and as necessary, accompany them during their visit.
2. Act as the California Society of the Sons of the American Revolution President's personal representative and liaison for distinguished guest at California Society events hosted by the President.
3. Oversee the distribution of packets of materials to distinguished guests; including the schedule of events, meal tickets name tags, etc.
4. Coordinate arrangements for spouses of distinguished guests with the California Society of the Sons of the American Revolution Ladies Auxiliary President.
5. Check the publication of the names of the distinguished guests in the agenda thereby ensuring proper introductions.
6. Ensure payment of certain expenses of distinguished guests as authorized by California Society SAR Officers.

As the Covid-19 pandemic has resulted in the cancellation of all State meetings the period from January 1, 2020 through June 30, 2020 the California State Society has been unable to hold any meetings during this time. Therefore, there has been no actions requiring the duties listed above.

Respectfully Submitted,

*Mark W. Kramer Chief of Protocol*

# The California Society of the Sons of the American Revolution Color Guard Commander Annual Report

*For January 1, 2019 to December 31, 2019*

Reporting Period: January 1, 2019 to December 31, 2019

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The position of Color Guard Commander for the California Society of the Sons of the American Revolution maintains the coordination point of programs requiring the participation of color guardsmen at California Society level, SAR activities and leading the guardsmen during those CASSAR events.

The Color Guard Commander is assisted by Color Guard Adjutant North Russ Kaiser and Color Guard Adjutant South Larry Wood.

CASSAR Chapter Color Guard units:

The California Society Color Guard is comprised of more than one hundred compatriots from eighteen chapters.

CASSAR Website Color Guard page:

The California Society website maintains a California Society Color Guard page. The objective is to publish news and information concerning past, present and upcoming activities of the California Society Color Guard and local chapter color guard units. The page contains useful information for California Society guardsmen including a link to the National Society of the Sons of the American Revolution Color Guard Handbook, the California Society Color Guard Activity Contest Report, and the qualifications for the National Society bronze silver, gold and the national Major General Baron von Steuben color guard medals and the California Society bronze, silver and gold Major General Baron von Steuben color guard medals and of course photographs of color guardsmen in action.

The CASSAR Color Guard participation in significant events:

In February of 2020 California Society Color Guardsmen participated in Massing of Colors hosted by the Sons of Liberty Chapter. The 2020 Covid-19 Pandemic has greatly affected the CASSAR chapters from participating in parades or local events as the California State Governor has limited social contact to reduce the spread of this virus.

Yearly the various Chapters report their members participating in various events representing the Sons of the American Revolution. During this pandemic I have received very few reports, indicating that the chapter color guards have not been participating in Local, State or National events.

Respectfully Submitted,

*Mark W. Kramer CASSAR Color Guard Commander*

## **CASSAR NOMINATING COMMITTEE REPORT**

January 1, 2020 to December 31, 2020

Reporting Date: October 29, 2020

Submitted/Prepared by: Derek J. Brown, Chair-Nominating Committee

### **CASSAR Nominating Committee Report Summary:**

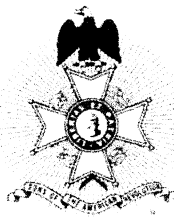
Per Bylaw No. 5 (Section 1) – The Nominating Committee is composed of the (7) most recent former presidents who are able, active at the state level, having been present at the immediately preceding annual meeting or fall board meeting, and willing to serve. The Committee is charged with identifying and recommending qualified Compatriots for the various elected officers at the state level.

Several e-mail communications were sent out in mid-2020 to the membership in an effort to identify qualified Compatriots for the open positions. These open positions include Vice President North and Historian. Several Compatriots have expressed interest in the two positions and have submitted/are submitting the required documents. The Nominating Committee will be holding interviews prior to the Fall 2020 Board of Managers meeting.

The COVID-19 pandemic and cancellation of the 2020 Congress resulted in elections for the newly nominated National Trustees not being held. Interviews are therefore being scheduled for the Trustee and Alternate Trustee positions prior to the Fall 2020 Board of Managers meeting.

Respectfully Submitted,

Derek J. Brown, PE  
Trustee, California (2019-2021)  
Chair, Nominating Committee CASSAR



*The California Society of the Sons of the American  
Revolution: Fall Compliance Report*

17OCT2020

Compatriots,

As you may be aware, it is the responsibility of all CASSAR officers, investment fund trustees, committee chairs/members and chapter officers to observe the highest standards of business and personal ethics in the conduct of their duties and responsibilities associated with the California Society Sons of the American Revolution. In addition, the officers, trustees, committee chairs of the CASSAR (being a not-for-profit tax-exempt organization) have a fiduciary duty and responsibility to carry out their duties in an honest and prudent manner, exercising the best skill and judgment for the sole benefit of CASSAR.

Accordingly, you (as an officer, trustee, committee member/chair, chapter officer) should read, sign, and return the two attached forms to the Compliance Committee Chair CASSAR. It is preferable that they be returned by e-mail (scanned), to the e-mail [lukaszad@gmail.com](mailto:lukaszad@gmail.com). One is the whistleblower form, and the second is the conflict of interest form. Please note that the latter form also asks that you indicate whether you have ever been convicted of a felony. Also note that these have been required since first adopted in April 2009.

Also, each Chapter has the responsibility of filing: both the Federal and State Tax reports, along with the California Raffle agreement form (if applicable) in a timely manner. The target date for reporting is January 1 to January 15 - if at all possible.

After reporting, please send an e-mail to [lukaszad@gmail.com](mailto:lukaszad@gmail.com) and attach the "acceptance of receipt notification" from either the IRS or the CA Franchise Tax Board for your chapter's 990-N, 990N, and RRF-1 for the year 2020. This ensures that each chapter is filing the proper forms in a timely manner so as to maintain tax-exempt status.

If a chapter does not file its tax returns it loses its status as a tax-exempt organization, so:



2. The chapter becomes a taxable organization and is required to pay taxes on any income it reports, and

3. In California the chapter is subject to the annual Franchise Tax of \$800, even if it is not reporting a profit.

#### From the IRS Web Site

- Annual exempt organization return: Due date Form 990, 990-EZ, or 990-PF must be filed by the 15th day of the 5th month after the end of your organization's accounting period. Thus, for a calendar year taxpayer, Form 990, 990-EZ, or 990-PF is due May 15 of the following year.

This is the current status, by chapter, of those who filed last year's tax reports.

990-N = Chapter sent in a receipt for their 990-N

199N-e = Chapter sent in a receipt for their 199N-e

RRF-1 = Chapter sent in a receipt for their RRF-1

P = Verbal Confirmation from Chapter but no confirmation numbers yet

E = Exempt

Chapter	990-N	199N	RRF-1
Butte Chapter			
Central Coast Chapter	X	X	
Coachella Valley Chapter	X	X	E
Delta Chapter	X	X	
Eagle Chapter			
General George S. Patton, Jr. Chapter			
General George Washington Chapter	X	X	X
Gold Country Chapter	X	X	
Harbor Chapter	X	X	
Kern Chapter	X	X	X
Monterey Bay	X	X	
Mother Lode Chapter	X	X	X
Orange County Chapter	X	X	X
Redding Chapter	X	X	
Redlands Chapter			
Redwood Empire Chapter	X	X	
Riverside Chapter	X	X	X
Sacramento Chapter	X	X	X
San Diego Chapter	X	X	X
San Francisco Chapter			
Santa Barbara Chapter			
Silicon Valley Chapter	X	X	X
Sons of Liberty Chapter	X	X	
South Coast Chapter	X	X	X
Thomas Jefferson Chapter	X	X	X
Yosemite Chapter	X	X	X

Respectfully Submitted,  
Luke Dziurzynski  
Compliance Committee Chair CASSAR

# THE CALIFORNIA SOCIETY

OF THE

## SONS OF THE AMERICAN REVOLUTION

(CASSAR)

### CONFLICT OF INTEREST/CODE OF ORGANIZATIONAL CONDUCT

#### SECTION 1. PURPOSE:

The California Society of the Sons of the American Revolution (known hereafter as CASSAR) is a not for profit, tax-exempt organization. Maintenance of its tax-exempt status is important for both continued financial stability, public and member support. Therefore, the Internal Revenue Service, as well as other regulatory agencies, tax officials and other stakeholders view the policy and operations of the SAR as a public trust, which is subject to scrutiny by and accountable to such authorities as well as its constituents.

Consequently, there does exist between the CASSAR and its officers, trustees, committee chairmen, and the general public a fiduciary duty that carries with it a broad and clear duty to fidelity and loyalty. The officers, trustees, and committee chairmen have the responsibility to administer the affairs in an honest and prudent manner, exercising the best skill, abilities and judgment for the sole benefit of the CASSAR. Those persons who serve in leadership capacities shall exercise good faith in all matters and transactions, and shall refrain from practices that allow personal gain or benefit due to knowledge or influence. The interest of the SAR shall be the priority in all decision and actions.

#### SECTION 2. PERSONS CONCERNED:

This code and statement is intended for all general officers, trustees, committee chairmen, and others as so determined by the board of managers of the CASSAR. All persons who may influence decisions of the CASSAR may be added at any time.

#### SECTION 3. AREAS OF POTENTIAL CONFLICT:

Conflicts may arise in relations to officers, trustees, and committee chairmen with any of the following third parties:

1. Persons and firms supplying goods and services to the CASSAR
2. Persons and firms from whom the CASSAR leases property or equipment.
3. Persons and firms with whom the CASSAR is maintaining or plans to maintain a business relationship that involves the sale of real estate, securities, or other property.
4. Competing or affinity organizations.
5. Donors and others supporting the CASSAR.
6. Agencies, organizations, and associations that affect the operations of the CASSAR.
7. Family members, close associates and other employees.

#### SECTION 4. NATURE OF CONFLICT OF INTEREST:

A conflicting interest may be defined as an interest, direct or indirect, with any person or firms mentioned in Section 3. Such interest may arise from the following activities:

1. Owning stock or holding debt or other proprietary interests in a third party dealing with the CASSAR.
2. Holding office, serving on the board, participation in management, or being otherwise employed or previously employed with any third party who conducts business or intends

- to conduct business with the CASSAR.
3. Receiving remuneration for services with respect to individual transactions involving the CASSAR.
  4. Using the time, personnel, equipment, good will or other resources of the CASSAR for activities other than approved activities, programs and functions.
  5. Receiving personal gifts, professional opportunities or loans from third-party vendors conducting business or intending to conduct business with the CASSAR. Receipt of any gift of cash is prohibited. Gifts with a value of less than \$25 (twenty-five dollars) may be accepted only if the acceptance avoids a discourtesy.

#### **SECTION 5. INTERPRETATION OF POLICY:**

The areas of conflicting interest listed in Sections 3 and 4 are examples of potential conflicts and may be expanded as situations dictate. All persons who serve in leadership and critical areas of the CASSAR shall use best judgment to determine any possible conflicts. The CASSAR Chancellor shall be consulted on any question of this policy.

Persons in leadership positions of the CASSAR shall disclose any potential conflict before transactions are consummated. The leadership shall scrutinize all transactions and disclose any activities that are, or have the appearance of, a conflict to the board of managers immediately upon knowledge of such activities.

This policy, once enacted, shall be mandatory for all affected members. Any change of the policy will require a two-thirds affirmative vote of the Board of Managers of the CASSAR. Such vote will occur at the Annual Meeting, or a Board of Managers Meeting.

#### **SECTION 6. DISCLOSURE POLICY AND PROCEDURE:**

Transactions with parties with whom a conflicting interest exists may only be undertaken when all four (4) of stipulations are met:

The conflict of interest is fully disclosed.

The person with the conflict refrains from discussion and approval of such transaction.

A competitive bid or comparable valuation exists.

The leadership, executive committee, board of managers, or duly constituted committee determines that the transaction serves the best interest of the CASSAR.

Disclosure shall be made to the CASSAR President (Executive Vice President if the President is the person in conflict) and the Chancellor, who shall bring the matter to the Board of Managers for discussion and resolution.

The duly constituted committee shall determine whether a conflict exists. Further, the constituted body shall determine in a fair, just, and reasonable manner if the approval of such transaction with the disclosed conflict best serves the interest and mission of the CASSAR.

Please circle one: I have / have never been convicted of a felony crime.

I acknowledge receipt of the above document, that I have read it, and that I understand its contents.

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
TITLE/POSITION

\_\_\_\_\_  
DATE

# THE CALIFORNIA SOCIETY

OF THE  
SONS OF THE AMERICAN REVOLUTION  
(CASSAR)

## WHISTLEBLOWER POLICY

It is the responsibility of all CASSAR Officers, CASSAR Investment Fund Trustees and CASSAR Committee members to observe the highest standards of business and personal ethics in the conduct of their duties and responsibilities, to comply with the Conflict of Interest/Code of Organizational Conduct Policy and to report violations or suspected violations in accordance with this policy. No CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member who in good faith reports a violation shall suffer harassment or retaliation to the extent such harassment or retaliation shall occur. A CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including review by the Ethics Committee. An open door policy exists so that CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee members can share their questions, concerns, suggestions or complaints with someone who can address them properly. In most cases, the CASSAR President or his designee is in the best position to address an area of concern. However, if a CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member is not comfortable speaking with the CASSAR President or his designee or the CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member is not satisfied with the response provided, the CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member is encouraged to speak with the Chairman of the Ethics Committee, CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member are required to report suspected violations of the Conflict of Interest/Code of Organizational Conduct Policy to the Chairman of the Ethics Committee, whose committee has specific and exclusive responsibility to investigate all reported violations on behalf of the CASSAR President. For suspected fraud, or when a CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member is not satisfied or uncomfortable with following the open door policy, the CASSAR Officer, CASSAR Investment Fund Trustee or CASSAR Committee member should contact the Chairman of the Ethics Committee directly.

I acknowledge receipt of the above document, that I have read it, and that I understand its contents.

---

PRINT NAME

---

SIGNATURE

---

TITLE/POSITION

---

DATE

ADOPTED AT THE 134TH SPRING MEETING OF THE MEMBERSHIP 18 APRIL 2009

The duly constituted committee shall determine whether a conflict exists. Further, the constituted body shall determine in a fair, just, and reasonable manner if the approval of such transaction with the disclosed conflict best serves the interest and mission of the CASSAR.

Please circle one: I have / have never been convicted of a felony crime.

I acknowledge receipt of the above document, that I have read it, and that I understand its contents

PRINT NAME

SIGNATURE

TITLE POSITION

DATE

Please complete this part.

**California Society of the Sons of the American Revolution**

**Board of Managers Meeting**

**Joseph S. Rumbaugh Historical Oration Report**

November 13, 2020

There have been two inquiries for this year's contest: one from Los Angeles and one from Orange County. Chapters should be mentioning the contest at their chapter meetings to establish knowledge and interest.

This year's 2020 National contest winner is Abraham Paik from Cleveland Heights, Ohio. Abraham competed with 15 other state winners to secure his national championship title.

The website has been updated for the 2021 contest. This year's contest deadline for submission to the chapter is February 19<sup>th</sup>. The deadline for chapter submissions to the state is March 5, 2021.

John R Ferris

Chairman, Joseph S. Rumbaugh Historical Oration Contest



**California Society**  
**Sons of the American Revolution**  
Instituted October 22, 1875  
Organized July 4 1876, Incorporated February 17, 1930



**Eagle Scout Program**  
**Fall 2020**

Submitted/Prepared by: William E. Nay "Bill" - CASSAR Chair, Eagle Scout Committee

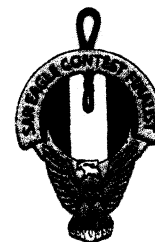
**Eagle Scout Recognition**

Most of the CASSAR Chapters provide the Eagle Scout Recognition Certificate to individuals that contact them and request it.



**Marion L. Brown Award**

The California Society was presented the Marion L. Brown Award for nominating Eagle Scout Michael McPhie as the 2019 Eagle Scout Contest Finalist, whom the National Eagle Scout Committee selected as the Eagle Scout Scholarship 1<sup>st</sup> Place winner.



**Arthur M. & Berdena King Eagle Scout Scholarship 2020**

The 2020 Eagle Scout Scholarship application deadline has been extended. The due date for the California Society from December 1st until **January 1st 2021**.

Each CASSAR Chapter may set their own due date that will give them time to review and select their Chapter winner. For a small Chapter with few applications this could be as late as December 15th. I suggest a December 1st deadline to allow for the holidays. If I get inquiries I will advise the Eagle Scout to check with their local Chapter, but to ensure it is timely, they should plan for a December 1st deadline.

**Inaugural Class of Female Eagle Scouts**

Also in the news, the Scouts BSA has made an adjustment to the Boards of Review for the Inaugural Class of female Eagle Scouts. Originally they were not going to hold the National Board of Review (BOR) until February 8, 2021. The latest guidance from September 24th is they may submit their BOR to National in October 2020. Thus, we could receive our first female Eagle Scout application by the December 2020 deadline.

<https://www.scouting.org/program-updates/inaugural-class-of-female-eagle-scouts/>

**Robert E. Burt Scout Volunteer Award**

Nominations may be submitted year-round; thus, we need to remind the chapters to nominate potential recipients. Once I receive the completed package from the chapters, it then gets sent to the National Eagle Scout Committee and it is voted on the next time they meet. (Spring Leadership)





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**CASSAR Sea Cadet Program (NSCC/NLCC)**

**Fall 2020**

Submitted/Prepared by: William E. Nay - CASSAR Sea Cadet (NSCC/NLCC) Chairman

Here is the Sea Cadet web link: <http://www.seacadets.org/about-nssc>

This is a very worthwhile program and allows us to meet some of the finest young people working towards a career in the military. If you are not already working with a Sea Cadet unit in your area here is a link to locate the nearest one.

<http://homeport.seacadets.org/secure/UnitDirectory.aspx>

The SAR Chapter award is the Sea Cadet medal and Ribbon with Certificate available from the National supply.

**Sea Cadet (NSCC) of the Year Award**

The California Society established a State level recognition program that includes a monetary award and certificate.

**Basic Criteria would include:**

- Recipient of the SAR Bronze Good Citizenship Medal.
- Submit a completed NSCC CADET OF THE YEAR – NSCADM 011 (Rev 11/16)
- Submit a 500-700 word essay. Topic – “How NSCC has prepared me to be a better citizen of the United States of America”.

The nomination package would be submitted to the nearest CASSAR Chapter. If the CASSAR Chapter has more than one NSCC Unit in their area and they receive multiple nominations they will select the best candidate to submit to the State NSC/NLCC Committee Chair.

**Timeline** - The nominations would be submitted by February 1<sup>st</sup> to the local CASSAR Chapter, and then submitted to the State NSCC/NLCC Chair by March 1<sup>st</sup>.

**Initial Recognition**

- Monetary award of \$1000.00\*
- Certificate

Any chapter that is interested in the Sea Cadet program, or has questions should contact me directly.

**National award level for this year!** 1<sup>st</sup> place **\$5,000** (plus \$1,500 travel expense); 2<sup>nd</sup> place **\$2,000**; 3<sup>rd</sup> place **\$1,000**; 4<sup>th</sup> place **\$250** and 5<sup>th</sup> place **\$250**

The following criteria applies to a cadet nominated by his/her JROTC Unit for Outstanding Cadet in the enhanced program:

### **JROTC Enhanced Program**

- 3<sup>rd</sup> year of a 4 year Program or 2<sup>nd</sup> year of a 3 year Program (**cadet must be a junior**);
- Top 10% of JROTC Class;
- Top 25% of his/her Student Body Class. (**Each year we receive entries not in top 25%**)

The program requires that a cadet write an original 500-700 word Essay in addition to meeting the above listed criteria. The original Essay Topic as found on the Nomination Form is

**"How JROTC has prepared me to be a better citizen of the United States of America."**

A completed Nomination Form and Recommendations (Endorsements) from the **SMI** and the school **Principal** are also required. The Principal's Endorsement must also verify the **Class Standing** and **GPA** of the cadet. A transcript may be provided, but **GPA verification by the Principal in his/her recommendation is still required.**

There is a special **Chapter Outstanding Cadet Medal Package** (bronze medallion with neck ribbon) for the Enhanced Program Winner, available at the NSSAR Store. The OC Medal Package (bronze medal on neck ribbon, ribbon with gold frame and a bronze star, certificate) costs \$45.00. Chapters are encouraged to present the Chapter OC Medal at their regular chapter meeting and then, present it again, at the JROTC Unit's Awards Ceremony or Awards Banquet.

Chapters may offer a monetary award to their winner, and they may also present a Certificate of Appreciation to each cadet nominated for the chapter contest.

There is a special **State Outstanding Cadet Medal Package** (silver medallion on neck ribbon, ribbon with gold frame and a silver star, certificate) that costs \$45.00. The State Society OC Medal could likewise be presented at the State Society Awards Ceremony and then presented again at the Unit's Awards Ceremony or Banquet.

**The State Society Winner's (Enhanced Program) Outstanding Cadet Package should reach me NLT Friday 1 May 2021. Preferred method of receipt is by email.**

**DO NOT SEND REGISTERED MAIL** – if mailed, use below address (Again preferred method of receipt is by email)

CAPT Roger W. Coursey  
259 Stagecoach Ave  
Guyton, GA 31312

Recommend that you send me your OC Winner Package early so that, if needed, corrections or adjustments could be made to the package before the deadline. *State Societies are encouraged to send me a copy of the OC Package by e-mail (Word or PDF)*

**GENERAL RECOMMENDATIONS/COMMENTS:**

\* If the SMI (Senior Military Instructor) has not already been contacted, now is the time for the Chapter Representative (President, Vice President, JROTC Chair) to affect liaison with the SMI at each JROTC Unit supported by the Chapter and reiterate the requirements for the Enhanced Program (sometimes referred to as the JROTC Outstanding Cadet Essay Contest).

\* Topic for the 500-700 word original Essay remains as in previous years - "How JROTC has prepared me to be a better citizen of the United States of America." Essay should be doubled spaced (a line between each typed line) and the **Cadet's name, rank and Units name and school should be on the first page. The cadet's name should appear on each page of the Essay. A word count must be displayed.**

\*The Nominating Form clearly states that **additional pages may be attached**, as required

**\*Lessons Learned from the last couple of years:**

- SMI should complete Nomination Form with input from cadet - list sponsor, chapter/state society. If extra space/pages are needed to answer a section, then please provide it.
- All lines of Nomination Form should have an entry
- Be specific, list what the cadet has done (general comments do not assist your cadet)
- List the facts and accomplishments instead of flowery adjectives.
- List awards - example: Varsity Letter Football, All District Tennis, All State Chorus, VFW Medal, Employment, After School programs and Weekend Activity, etc
- Ensure the cadet **is a Junior**
- Ensure the cadet is in the 3<sup>rd</sup> year of 4 year program or 2<sup>nd</sup> year of 3 year program
- Ensure the cadet is in the Top 25% of his or her class (verified by Principal).
- Strong Endorsements (Recommendations) by Principal and SMI are critical. Try not to repeat the same information about the cadet.
- Essays are not proctored, there is no excuse for spelling or grammar errors (please proof) and **must** include a Word Count.
- Only complete OC Packages will be forwarded to the Judges

.....  
If you have any questions, please do not hesitate to contact me by e-mail or phone.

Promoting Patriotism,

Roger W. Coursey  
NSSAR ROTC/JROTC/Service Academies Committee Vice Chair and  
Enhanced Program Coordinator

home: 912-728-3286 cell: 912-398-8055

captrog2000@yahoo.com

## ■ Funding Raising for the JROTC Operating Fund

For those who would like to recognize one or more of your JROTC military instructors for his or her work with supporting our program, I would like to suggest the JROTC lapel pin that we have available for sale.

The sales generated from these lapel pins is being used to increase the JROTC operating fund, from which we draw each year to cover the costs of the awards, so the more we are able to raise, the more we can increase the annual awards.

The pin is 3/4 inch in diameter and costs \$25.





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**CASSAR Sea Cadet Program (NSCC/NLCC)**  
**Fall 2020**

Submitted/Prepared by: William E. Nay - CASSAR Sea Cadet (NSCC/NLCC) Chairman

Here is the Sea Cadet web link: <http://www.seacadets.org/about-nsc>

This is a very worthwhile program and allows us to meet some of the finest young people working towards a career in the military. If you are not already working with a Sea Cadet unit in your area here is a link to locate the nearest one.

<http://homeport.seacadets.org/secure/UnitDirectory.aspx>

The SAR Chapter award is the Sea Cadet medal and Ribbon with Certificate available from the National supply.

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- Recipient of the SAR Bronze Good Citizenship Medal.
- Submit a completed NSCC CADET OF THE YEAR – NSCADM 011 (Rev 11/16)
- Submit a 500-700 word essay. Topic – “How NSCC has prepared me to be a better citizen of the United States of America”.

The nomination package would be submitted to the nearest CASSAR Chapter. If the CASSAR Chapter has more than one NSCC Unit in their area and they receive multiple nominations they will select the best candidate to submit to the State NSC/NLCC Committee Chair.

**Timeline** - The nominations would be submitted by February 1<sup>st</sup> to the local CASSAR Chapter, and then submitted to the State NSCC/NLCC Chair by March 1<sup>st</sup>.

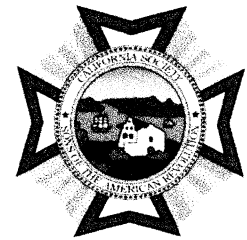
#### **Initial Recognition**

- Monetary award of \$1000.00\*
- Certificate

Any chapter that is interested in the Sea Cadet program, or has questions should contact me directly.



**The California Society  
of the  
Sons of the American Revolution**



**Valley Forge Teacher Recognition Program**  
**2020 Report for the Fall Board of Managers Meeting**

Two highly-qualified applicants submitted application packages this year and were selected by the committee chairman to attend this year's workshop; however, with the nation-wide shutdown caused by the Covid-19 pandemic, a virtual workshop was provided by the Freedoms Foundation at Valley Forge in lieu of an actual workshop. An agreement was worked out with the Freedoms Foundation to provide the workshop for our two honorees in 2021 in exchange for paying the tuition for them this year. This means the program will be able to support four selectees in 2021 for the tuition of two. The two teachers selected by CASSAR to attend the 2020 workshop were **Ms. Janey Moffitt**, Rocklin Academy Meyers, Rocklin, and **Ms. Hallie Vae Wallace**, Oak Chan Elementary School, Folsom, both sponsored by **Sacramento Chapter**. The 2020 Program, titled "Philadelphia Campaign", which will be offered again in 2021, includes stops at historic sites in Philadelphia, Pennsylvania and New Jersey, including:

Independence Hall & the Liberty Bell  
Gen Anthony Wayne's grave  
Nassau Hall & Princeton Battlefield  
Birmingham Friends Meeting House  
Valley Forge National Historical Park  
Fort Mifflin & National Constitution Center  
Christ Church & Burial Ground  
Morristown/Jockeytown & Museum of the American Revolution

Brandywine Battlefield and Battle of Clouds  
Washington's Crossing  
Franklin Post Office & Betsy Ross House  
Peter Wentz Farmstead & Cliveden House  
Monmouth Battlefield  
Paoli Massacre Site  
Augustus Lutheran Church & Evacuation

It is anticipated there will be increased interest in this program for 2021, particularly with the opportunity for four teachers to represent California. The Freedoms Foundation is offering the 2021 "American Revolution: Philadelphia Campaign" twice, 27 June-2 July and 18-23 July, with the teachers able to select which workshop fits their needs best.

Respectfully submitted

***Robert L. Taylor***

Valley Forge Teacher Recognition Program Chairman

## **JROTC / ROTC PROGRAM**

**January 1, 2020 to December 31, 2020**

**Reporting Date: September 28, 2020**

**Submitted by: JROTC / ROTC Program Chairman Brandon Villardi**

### **JROTC/ROTC Program Summary:**

Due to the Covid-19 pandemic many JROTC/ROTC awards ceremonies have been postponed or canceled.

Since taking starting the position of JROTC Chairman in March, I have received 6 inquiries for awards of which 5 were connected to a local chapter.

As CASSAR JROTC chairman, I issued a Bronze Medal, Bar, and Certificate on May 13, 2020  
Cadet Sergeant Leslie Espinoza  
Selma High School  
CO First Sergeant Mike Romero

CASSAR JROTC Enhancement Medal, Bar and Certificate recipient April 18, 2020  
Cadet SMSgt. Megan Lange  
Casa Roble Fundamental High School  
Orangevale, California

As of October 15<sup>th</sup>, 2020, I have not yet received and inquires for the CASSAR JROTC Enhancement Award. Chapter deadline is February 15, 2020

**CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION**  
**COMMITTEE REPORT**  
**10/12/2020**  
**PUBLIC SERVICE AND HEROISM COMMITTEE**

In 2017, the NSSAR approved a new Life Saving Medal and Certificate that maybe presented to honorees who took action resulting in the saving of a human life without placing themselves in imminent danger. This award was created to reserve the SAR Heroism Award for those who demonstrate outstanding bravery and self-sacrifice in the face of imminent danger. In addition to the Life Saving and Heroism Medals, there are three Public Service Medals – Law Enforcement, Fire Safety, and Emergency Medical Services that the State Society presents semi-annually, and each Chapter is encouraged to present annually and to report those presentations using the on-line reporting form found on the NSSAR website under the Public Service and Heroism Committee heading. The criteria for presentation of the five awards and reporting requirements can be found in the NSSAR Handbook.

State Societies, Chapters, and Commendation Recipients are recognized in a booklet funded by the George Washington Fellows and published by the NSSAR Public Service and Heroism Committee. Booklets are distributed at the National Congress in July of each year.

In 2019, in addition to the California Society, six of the twenty-four California Chapters reported award presentations. Those Chapters were General George Patton, General George Washington, Gold Country, Kern County, Orange County, and Silicon Valley.

In 2020, Sacramento and Redwood Empire Chapters are the only Chapters who have reported award presentations.

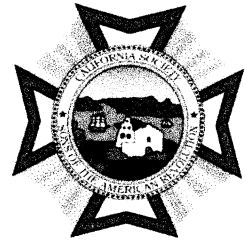
If Compatriots/Chapters have any questions concerning the SAR Public Service Awards for Law Enforcement, Fire Service, Emergency Medical Services, Heroism, or Life Saving they are encouraged to contact the Committee Chair – Brian Stephens, Riverside Chapter (951) 354-9352 [briandi777@aol.com](mailto:briandi777@aol.com)

Respectfully Submitted,  
Brian Stephens





**The California Society  
of the  
Sons of the American Revolution**



**Spirit of America Award Program**  
**Report for the 2020 Fall Board of Managers**

As a direct result of the Covid-19 Pandemic and resulting shutdown of the schools, the General George S. Patton, Jr. Chapter was not able to present Spirit of America awards at the graduation ceremonies for any of the middle schools in Ventura County during the school year 2020. Additionally, no program reports or inquiries were received from any of the other chapters within the California Society.

As the public and private schools open up, the General Patton Chapter will reestablish communications for implementation of the program for the 2021 school year. With the upheaval of our chapters caused by this pandemic, it is a great opportunity to evaluate the Spirit of America program towards Implementing it within other chapters. I and the General Patton Chapter stand ready to assist any chapter considering doing so.

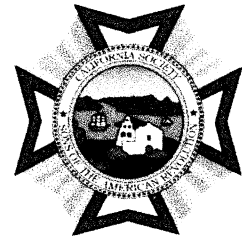
Respectfully submitted

***Robert L. Taylor***

Spirit of America Award Program Chairman



**The California Society  
of the  
Sons of the American Revolution**



**Gen. George S. Patton, Jr. Chapter Report**

For Board of Managers Meeting

Website: [www.pattonpatriots.org](http://www.pattonpatriots.org)

Prepared: 26 February 2020

Reporting Officers:

Submitted by: Thomas Shaw, Chapter President

Kim Thomas, Chapter Treasurer

Prepared by: Robert Taylor, Chapter Secretary

Robert Taylor, Chapter Secretary

**General Patton Chapter Summary:**

The General Patton Chapter has seen a growth in membership with 8 new members being added, in addition to the approval of 4 supplemental applications. Due to the coronavirus pandemic, the Chapter was forced to stop meeting monthly for a luncheon on the second Friday of each month at the Poinsettia Pavilion in Ventura. The meetings for March and April were cancelled, with Zoom virtual meetings being conducted in May through July, and October. May was an attempt to stir interest by being held on a Saturday vice the normal Friday, but no increase in attendees was noted. Zoom meetings were attempted in August and September, but difficulties in setting up the meeting forced cancellation. Attendance varied from a high of 14 to a low of 7. On a more somber note, the chapter lost one member, Mark Collins III passing away 19 February.

The Chapter Color Guard has not been active since March due to the pandemic and consequent shutting down of outside activities. However, prior to the shutdown, the color guard participated in the Massing of the Colors at Forest Lawn and the NSSAR spring Leadership meeting in Louisville, both in February. One color guard member presented the Sea Cadet award to Petty Officer First Class Owen Rybricek of the Ben Moreel Battalion at Port Hueneme. With the closing of schools, the Chapter was unable to present Spirit of America awards in June at the graduation ceremonies of the Pleasant Valley School District middle schools in Camarillo.

The Secretary participated in several NSSAR and CASSAR virtual meetings, the NSSAR meetings as alternate California trustee, chairman of the Council of State Presidents, or as a committee member. Prior to the shutdown, the Secretary as CASSAR President attended meetings at Kern and Sons of Liberty Chapters in January to install the officers, and attended Santa Barbara Chapter meetings in January and February.

## **HARBOR CHAPTER**

January 1, 2020, to December 31, 2020

Reporting Date: September 28, 2020

Submitted by: Chapter President Brandon Villardi

Prepared by: Chapter Secretary Jack Mulkey

### **Harbor Chapter Summary:**

Harbor Chapter started the year with 65 members. but unfortunately, 13 members were eventually dropped due to nonpayment of dues. With the efforts of our Chapter Secretary, Jack Mulkey, we were able to reinstate 8 of the dropped members. The chapter has welcomed 6 new members this year, bringing our member total up to 66. Although we have not seen much growth, our registrar does have several applications pending for both new members and supplementals.

Like so many other chapters, we've seen many of our regular parades and activities canceled because of the Covid-19 pandemic. However, the Harbor Chapter color guard was able to participate in several large events, such as the Massing of the Colors in Los Angeles and the Revolutionary War Reenactment in Huntington Beach, and joined the Orange County color guard at the Richard Nixon Library for an Independence Day celebration. Under the instruction of California Color Guard Commander Mark Kramer, 5 Members of our color guard completed the NRA Basic Black Powder Training and look forward to possibly firing at upcoming Veterans Day and/or Wreaths Across America events. Three of our compatriots, including a junior member, received their Bronze Color Guard Medals and one member received his Silver State and National Color Guard Medal.

For Youth Programs, Harbor Chapter received over 30 entries for the 5<sup>th</sup> grade poster contest. We are proud to report that our chapter winner also won 4<sup>th</sup> place in the State contest as well. Unfortunately, we had only 1 entry in the Knights Essay Contest. The chapter was honored to award 1 Sea Cadet Medal and 7 JROTC Medals. We are hoping to expand our youth programs in 2021

Unfortunately, our regular meeting location has closed permanently; however, I am happy to report that Harbor Chapter does continue to hold its regular monthly meetings via Zoom teleconference on the 1<sup>st</sup> Thursday of each month. We are currently averaging about 18-20 attendees. A couple of our compatriots have stepped up during this time and provided wonderful presentations on DNA Testing and Historic Museums.

Harbor Chapter has been welcomed to hold its in-person meetings at the Elks Lodge in San Pedro once it's deemed safe to do so.

## **REDWOOD EMPIRE CHAPTER**

### **CHAPTER # 28**

January 1, 2020 to December 31, 2020

Reporting Date: October 3, 2020

Submitted By: Chapter President William Van Valkenburg

Prepared by: Chapter President William Van Valkenburg

#### **Reporting Officers:**

President William Valkenburg

Treasurer: Harry Stover Jr

Secretary Stanley Laughlin

#### **Chapter Board:**

#### **Elected Officers:**

President William Van Valkenburg

Vice President Jan Van de Wetering

Historian James Beatty

Secretary Stanley Laughlin

Chaplain William Beatty

Registrar Harry (Smokey) Stover Jr

Treasurer Peter Goyhenetche / Harry Stover

#### **Appointed Officers:**

Youth Programs Chair/ Eagles Scouts of America Committed / JROTC/ ROTC/ Sea Cadet Committed/ Chair: William Nay. Awards Chair: William Van Valkenburg, Harry (Smokey) Stover Jr. Secretary: Stanley Laughlin, Photographer Chair: John Kuykendall. Website master: Peter Goyhenetche.

#### **REDWOOD EMPIRE CHAPTER SUMMARY:**

In 2020 the chapter held (5) meeting to Include Wreaths Across America in December. We presented (37) flag certificate, to the residence of Rohnert Park & Santa Rosa area bring our total around 45. **As a Chapter we inducted (8) new member in to (SAR). Feb- Kevin Kramer, Charles Rice, (Apr)- Robert Epperson, Michael Fong. (Jul)- Justus Stevens, James Duffied & sons Richard, Robert. We had a secret meeting in the Sonoma Park. Several more are in the process of membership.** We are schedule for the BOM in Nov 2020. But due to the pandemic the BOM will be cancelled until Nov 2022.

#### **Membership Summary:**

Number of members as of December 31, 2020 +50

Members as of January 1, 2020 57

Members as of January 1, 2020 = 53  
Number of new members in to the chapter in 2020=8  
Number of dropped members in 2020 = 0

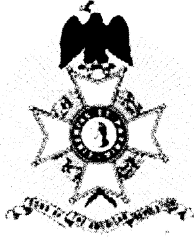
Dues Payment to CASSAR for 2020 \$1645.00  
Dues Payment to NSSAR for 2020+ \$ 1175.00  
Total Dues in 2019 for 2020 \$ 2600.00

**Financial Information:**

Chapter Treasurer Peter Goyhenetche & Harry Stover Jr

Bank: Wells Fargo  
Address: P. O. Box 6995  
Portland, OR 97228-6995  
Balance in account as of Dec 2019 – \$ 4,097.60  
Acct Number: XXXXXX- 8251  
Peter Goyhenetche & Harry Stover Jr

President William G. Van Valkenburg  
112 Circulo Chapala  
Rohnert Park, Calif 94928-1911



**The California Society  
of the  
Sons of the American Revolution**



**Riverside Chapter  
Semi-annual Report  
14<sup>5</sup>~~4~~<sup>th</sup> Board of Manager Meeting**

The Riverside Chapter held meetings in January and February of 2020 and due to COVID 19 the March 2020 meeting was cancelled, meetings resumed in September using ZOOM and the current plan is to hold Teleconference meetings until the pandemic is over in the country and things go back to normal.

The chapter canceled many of the Color Guard Events that were scheduled in 2020, due to the pandemic as well as the youth programs and other community activities.

The chapter-maintained contact with its membership by sending out a monthly newsletter, and birthday cards to the membership.

Respectfully,  
Fred Schuster, Secretary  
Riverside CA Chapter

**The California Society of the Sons of the American Revolution  
Sacramento Chapter Annual Report  
January 1, 2020 to December 31, 2020**

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**Number of Meetings held in 2020:** 11 (2 in-person meetings and 9 video conference meetings)

**List SAR programs in which chapter participated in 2020:** Outstanding JROTC Contest, ROTC/JROTC recognition awards, Americanism Poster Contest, Brochure Contest.

**List events in which chapter participated in 2020:** Folsom, CA 4th of July Presentation of the Colors,

**List color guard events in which chapter participated in 2020:**

- Posted the colors at a meeting of the US Coast Guard Auxiliary
- Posted the colors at a meeting at a Sacramento DAR meeting
- Posted the colors at a meeting of the Colonial Dames of the 17 Century

**Chapter Highlights:** The Sacramento Chapter School Guard (SAR & DAR Members) gave 5th Grade Living History presentations at 1 school.

**Award presentations:**

- SAR Daughters of Liberty Medal to Helena Hurst Sacramento DAR
- SAR Martha Washington Medal to Susan Checchettini Sacramento DAR
- SAR Life Saving Medal: Officer Nolan McManus – Woodland Police Department
- SAR Law Enforcement Medal: Detective Dirk Leonard – Yolo County Sheriffs Department
- SAR Heroism Medal: Officer Chris Cobb – West Sacramento Police Department
- SAR Heroism Medal: K9 Officer Scott Farnsworth – West Sacramento Police Department
- SAR Law Enforcement Medal: Detective Louis Cameron - West Sacramento Police Department
- SAR Life Saving Medal: Officer Misty Johnson – Elk Grove Police Department
- SAR Life Saving Medal: Officer Braden Kelly – Elk Grove Police Department
- SAR Life Saving Medal: Officer Jarred Houston– Elk Grove Police Department

**Flag Certificate Presentations:**

**ROTC and JROTC Program:**

The Sacramento Chapter presented a Chapter Outstanding JROTC award to Cadet Cadet/Megan Nichole Lange; Cadet Lange also won the CASSAR Outstanding Cadet Award. 13 Bronze JROTC Medals and Certificates were presented to 12 high school cadets. 3 Silver ROTC medals were presented to ROTC Cadets at UC Davis and CSU Sacramento.

**Veterans Recognition:**

- Ernie Garcia Certificate of Patriotism**
- Jeff Goodwin Certificate of Patriotism**
- Dennis Deck Certificate of Patriotism**
- Ron Hollis Certificate of Patriotism**
- Michael Jorden Certificate of Patriotism**
- Christopher Johnson Certificate of Patriotism**

**Certificates of Appreciation:**

**Principal Chapter Officers for year 2020:**

- President: Del Hanson
- Exec VP: Michael Hull
- VP Programs Craig Anderson
- Secretary: Mark Mozdy
- Treasurer: Donald B. Littlefield

**The California Society of the Sons of the American Revolution  
Sacramento Chapter Annual Report  
January 1, 2020 to December 31, 2020**

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- Registrar: Scott Brooks - David Cofer

**Summary Membership Report:**

- Members\* on 1/1/2020: 178

**List all chapter assets (who has custody of asset), and approx. value, if over \$100, as of 12/31/2019:**

Checking Acct, Golden 1 CU #148575 (signers: D. Littlefield, C. Anderson, J. Faulkinbury)  
Money Market Acct Golden 1 CU #148575 (signers: D. Littlefield, C. Anderson, J. Faulkinbury )  
US Flag and Stand (Craig Anderson)  
SAR Flag and Stand (Craig Anderson)  
8 historic flags (Craig Anderson)  
Chapter Medals Inventory (Ernie Garcia)  
21 historic flags (Michael Hull)  
US, CA, & SAR flags (Michael Hull)  
26 Bronze flag stands (Roy Adkins)  
Sound System for School presentations

- Yamaha EMX 512sc amplifier (Carl Ahlberg)
- 2 Community DnD12 speakers (Carl Ahlberg)
- 2 speaker stands (Jim Faulkinbury)
- 5 Audio-Technica ATW 3100 UHF Wireless Receivers (Carl Ahlberg)
- 1 Audio-Technica ATW T310 UHF Wireless Transmitter lavalier mic (Jim Faulkinbury)
- 1 Audio-Technica ATW T310 UHF Wireless Transmitter lavalier mic (Jim Faulkinbury)
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- 1 Audio-Technica ATW T310 UHF Wireless Transmitter lavalier mic (Carl Ahlberg)
- 1 Audio-Technica ATW T310 UHF Wireless Transmitter lavalier mic
- 1 Audio-Technica P615 Cardoid Dynamic Vocal Microphone (Carl Ahlberg)
- Misc speaker cables (Carl Ahlberg)

Stage Prop Brown Bess Musket and bayonet (Jim Faulkinbury)  
Stage Prop Denix Brown Bess Musket and bayonet (Russ Kaiser)  
Gator Power Rack for Wireless Receivers (Carl Ahlberg)  
Parade Banners (Russ Kaiser)  
A-Frame meeting sign SAR Sacramento (Don Littlefield)  
6 Liberty Bells (Guest Speaker Honorarium) (Will Gunter)  
Metal SAR labels for liberty bells (Don Littlefield)  
Ships brass bell for "End of Watch" memorial ceremonies (Don Littlefield)  
Small stick on SAR logos for name badges (Craig Anderson)  
Two shiny gold weighted flag stands in a suitcase (Don Littlefield)  
6 waffle boards: Declaration of Independence, Bill of Rights, and 4-page US Constitution (Don Littlefield)  
1 – SAR portable retractable Minute Man banner (Craig Anderson)



**YOSEMITE CHAPTER**  
January 1, 2020 to September 30, 2020

Reporting Date: September 30, 2020  
Submitted by: Chapter President John Hendon  
Prepared by: Chapter President John Hendon

Reporting officers:  
President John Hendon  
Vice President & Secretary Roy Smith  
Treasurer Ryan McGuire

**Chapter Board:**

**Elected Officers:**

President John Hendon	Treasurer Ryan McGuire
Vice President Roy Smith	Registrar Randy Dhindsa
Secretary Roy Smith	Historian Ted Hawkins

Note: New officers have been elected and will be sworn in at the December meeting and ready to take their chairs January 1, 2021.

**Appointed Officers:**

ROTC/JROTC Chair Roy Smith: Awarded medals to Clovis area High Schools:

**YOSEMITE Chapter Summary:**

This year to date Yosemite Chapter's membership has grown by 26% with 5 new members. We have 2 members pending transfer from another chapter, 2 new applications pending approval and 2 Junior members who have submitted applications pending approval.

We relocated our regular meeting place from the Fresno County Library and The Trailhead at Dry Creek to The Vineyard/Armenian Home on Kings Canyon Ave. during October. Three monthly meetings were held via ZOOM and one meeting was a combination ZOOM and in-person gathering.

All activities with the community have been curtailed due to the current virus pandemic.

**Membership Summary:**

Number of members as of December 31, 2019:	19
Number of members as of September 30, 2020:	25
New members in 2020:	5
Transferred in member(s)	1
Number of drops in 2020:	0

**Dues for 2020 collected in 2019:**

Dues to CASSAR:     \$ 110.00  
Dues to NSSAR:     \$ 360.00  
Dues Collected:     \$1,140.00

Dues collection for 2021 year are in process.

**Financial Information**

Bank signatory's:

President: John Hendon

Vice President

& Secretary Roy Smith

Treasurer Ryan McGuire

Registrar Randy Dhindsa

Noble Credit Union

8087 N. Cedar Ave

Fresno, CA 93720

Balance in account as of September 30, 2010: \$2,915,71

Membership Number: 0000212391, Acct #9

Treasurer:     Ryan McGuire  
                  3420 Border Links Dr.  
                  Visalia, CA 93291

[ryanmcmoo@comcast.net](mailto:ryanmcmoo@comcast.net)

## VP-Membership Report

The VP-Membership is the primary contact person for those interested in applying for membership in SAR. He also is contacted by those seeking information on ROTC/JROTC certificates, Sea Scout awards, and other programs.

I have referred at least 354 people to the nearest chapter registrars since the beginning of this year. It is very important that you keep me advised of who your registrar is so we can provide the best service to them.

Douglas Bergtholdt  
VP-Membership

## Best Chapter Program

The Best Chapter program for 2020 has been affected by the Corona-19 pandemic. Only 5 chapters have submitted reports which is about normal every year.

There is discussion that we replace the current program and replace it with another based on the NSSAR Americanism Program which has 3 pages of forms to fill out, and involve more chapter members participation and time frames

We will also have to purchase new plaques this year as several are full or near full.

If we decide to keep the current program, what changes, if any , need to occur to make it better?

Douglas Bergtholdt  
Best Chapter Chairman

## Best Chapter Program

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Douglas Bergtholdt  
Best Chapter Chairman

# The California Society of the Sons of the American Revolution

## Information Technology Chairman Report Fall 2020

Information Technology continues to operate the California Society SAR website at <http://www.californiasar.org>

**The Members Section has been reorganized. You can find what you are looking for by clicking on easy to identify sections such as “Treasurer”, “Secretary” or “Meeting Archive” and more.**

In the first 10 months of 2020 we served 26,192 pages to 7,014 users from all over the world, but with a vast majority of our visitors coming from right here in California.

In addition to information about the CASSAR and how to join SAR in general, we have a feature to locate your nearest chapter and connect with the officers and website of those chapters. If your chapter information needs to be updated, or you believe a zip code lookup is in error, please notify Greg Hill.

The Top 5 most popular pages are the Homepage, Chapter Locator, Members Section, Officers List, and Compatriot Download Page.

We continue to host the California Compatriot. The current Summer 2020 edition has been downloaded over 443 times. Issues dating as far back as 2007 are available for download.

Important notices and documents pertaining to the online meetings for Spring and Fall 2020 were posted on the website to make it easy for members to get the information they need.

Updates and corrections to existing material and ideas for new content can always be submitted to Greg Hill at [gjhill@mac.com](mailto:gjhill@mac.com)



Gregory J Hill  
California SAR Information Technology Chairman



November 10, 2020

**Audit Committee** – Due to the COVID-19- related meeting restrictions, the semi-annual financial audit was conducted virtually. The Audit Committee included EVP Brian Stephens, Chairman, VP-North Craig Anderson, VP- South Jim Klingler, North Member at Large - Bill Nay and South Member at Large – Curtis Porter; and President Don Littlefield. The audit period covered April 1, 2020 through October 31, 2020. The audit process was similar to the last period which was also conducted electronically rather than in person: (1) The Treasurer sent the committee lists of all checks written during the period and all deposits made during the period; (2) The committee made random selections from each list and requested the supporting documents for the selected transactions; (3) The Treasurer provided the supporting documents for each selected transaction. The Committee selected 15 checks and 9 deposits during the period and the Treasurer John Ferris provided support for all transactions.

Results - all financial reports and records were found to be in good order with no exceptions.



**The California Society**  
of the  
~~Sons of the American Revolution~~  
Instituted October 22, 1875  
Organized July 4, 1876, Incorporated February 17, 1890

**John R Ferris**  
**Treasurer**  
5 Libra Court  
Coto De Caza, CA 92679-5113  
714.270.7092  
Jrf1776@outlook.com

**TREASURER'S REPORT**  
**JANUARY 1 TO SEPTEMBER 30, 2020**  
**NINE-MONTHS ACTUAL COMPARED TO FULL-YEAR BUDGET**

The following are the operating receipts and expenses for the fiscal year ending  
September 30, 2020:

**INCOME STATEMENT**

	9 Months 2020 <u>Actual</u>	FY 2020 Annual <u>Budget</u>	Variance  <u>To Budget</u>
<b>RECEIPTS</b>			
I-01A · Annual Dues Received - CASSAR	\$ 24,615	\$ 25,000	\$ (385)
I-01B · Annual Dues Received - NSSAR	\$ 40,230	\$ 43,750	\$ (3,520)
I-03A · LM Annual CASSAR Dues (from Inv acct)	\$ 0	\$ 6,000	\$ (6,000)
I-03B · LM Annual NSSAR Dues (from Inv acct)	\$ 0	\$ 9,625	\$ (9,625)
I-04 · LM Dues for Chapters (from Inv acct)	\$ 0	\$ 3,000	\$ (3,000)
I-05 · New Member CASSAR Dues	\$ 2,840	\$ 3,000	\$ (160)
I-06 · Supplemental App State Fee	\$ 560	\$ 750	\$ (190)
I-08 · Bank Account Interest	\$ 1	\$ 10	\$ (9)
I-09 · Reinstated Member Fee	\$ 1,785	\$ 1,000	\$ 785
I-14 · Interest Income-San Diego Fund	\$ 816	\$ 1,600	\$ (784)
I-16 · New Life Member Dues	\$ 1,282	\$ 700	\$ 582
I-17 · Other Income	\$ 75	\$ 0	\$ 75
I-18 · Transfer From Education Fund	\$ 0	\$ 2,500	\$ (2,500)
I-19 · Transfer From Unallocated Fund	\$ 16,760	\$ 2,000	\$ 14,760
I-25 · Donations	\$ 6,392	\$ 1,000	\$ 5,392
I-45 · Sales of Congress Shirts	\$ 140	\$ 0	\$ 140
I-57 · California Medal Sets	\$ 35	\$ 1,750	\$ (1,715)
I-62 · Compatriot Subscription Fees	\$ 215	\$ 0	\$ 215
<b>Total Receipts</b>	<b><u>\$ 95,746</u></b>	<b><u>\$ 101,685</u></b>	<b><u>\$ (5,939)</u></b>

**Executive Committee Expenses**



A-01 · President Expenses	\$ 0	\$ 500	\$ (500)
A-02 · Executive VP Expenses	\$ 23	\$ 300	\$ (277)
A-03 · VP North Expenses	\$ 0	\$ 100	\$ (100)
A-04 · VP South Expenses	\$ 0	\$ 100	\$ (100)
A-05 · VP Membership Expenses	\$ 0	\$ 100	\$ (100)
A-06 · Executive Secretary Expenses	\$ 0	\$ 1,000	\$ (1,000)
A-07 · Treasurer Expenses	\$ 1,617	\$ 1,600	\$ 17
A-08 · Registrar Expenses	\$ 16	\$ 300	\$ (284)
A-09 · Genealogist Expenses	\$ 646	\$ 700	\$ (54)
A-11 · Chancellor Expenses	\$ 0	\$ 100	\$ (100)
A-12 · Historian Expenses	\$ 0	\$ 100	\$ (100)
A-14 · Chaplain Expenses	\$ 0	\$ 100	\$ (100)
A-15 · Surgeon Expenses	\$ 0	\$ 100	\$ (100)
<b>Total Exec. Committee Expenses</b>	<b>\$ 2,302</b>	<b>\$ 5,100</b>	<b>\$ (2,798)</b>

#### **Committee Expenses**

B-21 · Awards & Medals Committee Expenses	\$ 1,174	\$ 1,500	\$ (326)
B-22 · Best Chapter Contest Expenses	\$ 225	\$ 650	\$ (425)
B-24 · New Chapter Assistance Expenses	\$ 0	\$ 250	\$ (250)
B-27 · Poster Contest Expenses	\$ 925	\$ 1,200	\$ (275)
B-29 · Brochure Contest	\$ 1,071	\$ 1,200	\$ (129)
B-30 · Oration Contest	\$ 0	\$ 1,770	\$ (1,770)
B-33 · JROTC Committee Expenses	\$ 1,045	\$ 1,970	\$ (925)
B-34 · CAR Expenses	\$ 0	\$ 1,000	\$ (1,000)
B-35 · Eagle Scout Contest Expenses	\$ 1,000	\$ 1,970	\$ (970)
B-36 · Law Enforcement/Public Service Awards	\$ 0	\$ 750	\$ (750)
B-37 · DAR Liaison Expenses	\$ 0	\$ 250	\$ (250)
B-39 · Essay Contest Expenses	\$ 1,055	\$ 1,770	\$ (715)
B-40 · Travel Assistance for Contestants	\$ 0	\$ 1,400	\$ (1,400)
B-41 · Spring Meeting Allowance	\$ 0	\$ 500	\$ (500)
B-42 · Fall Meeting Allowance	\$ 0	\$ 500	\$ (500)
B-43 · Visiting PG Expenses	\$ 0	\$ 1,900	\$ (1,900)
B-44 · Sea Cadets Expenses	\$ 0	\$ 200	\$ (200)
B-60 · Valley Forge Contest Expenses	\$ 3,100	\$ 4,200	\$ (1,100)
B-70 · Richard F. Locke Award	\$ 1,000	\$ 1,250	\$ (250)
<b>Total Committee Expenses</b>	<b>\$ 10,595</b>	<b>\$ 24,230</b>	<b>\$ (13,635)</b>

#### **Program Expenses**

C-45 · California Compatriot Expenses	\$ 1,091	\$ 1,500	\$ (409)
C-49 · CASSAR Flag Expenses	\$ 0	\$ 150	\$ (150)
C-50 · Congress Hospitality Suite	\$ 0	\$ 750	\$ (750)
C-51 · Color Guard Cmdr Flags & Streamers	<u>\$ 0</u>	<u>\$ 1,250</u>	<u>\$ (1,250)</u>
<b>Total Program Expenses</b>	<b><u>\$ 1,091</u></b>	<b><u>\$ 3,650</u></b>	<b><u>\$ (2,559)</u></b>

#### **Other Operating Expenses**

E-01 · Annual Dues to NSSAR	\$ 50,840	\$ 53,375	\$ 2,535
E-02 · LM Dues to Chapters	\$ 2,980	\$ 3,000	\$ (20)
E-03 · Filing Fees	\$ 95	\$ 100	\$ (5)
E-10 · General Liability Insurance	\$ 0	\$ 365	\$ (365)
E-11 · D&O Liability Insurance	\$ 0	\$ 265	\$ (265)
E-25 · Software and Computer Supplies	\$ 0	\$ 0	\$ 0
E-30 · Storage Rent & Supplies	\$ 0	\$ 750	\$ (750)
E-40 · Other CASSAR Expenses	\$ 0	\$ 2,000	\$ (2,000)
E-55 · The SAR Foundation	\$ 17,760	\$ 1,000	\$ 16,760
E-70 · Communication Software	\$ 378	\$ 0	\$ 378
E-80 · Credit Card Fees	<u>\$ 0</u>	<u>\$ 25</u>	<u>\$ (25)</u>
<b>Total Other Operating Expenses</b>	<b><u>\$ 72,053</u></b>	<b><u>\$ 60,880</u></b>	<b><u>\$ 11,173</u></b>

<b>Total Operating Expenses</b>	<b><u>\$ 86,041</u></b>	<b><u>\$ 93,860</u></b>	<b><u>\$ (7,819)</u></b>
---------------------------------	-------------------------	-------------------------	--------------------------

<b>Net Operating Surplus/(Deficit)</b>	<b><u>\$ 9,705</u></b>	<b><u>\$ 7,825</u></b>	<b><u>\$ 1,880</u></b>
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#### **E-51 · Transfers to (from) Investment Accounts**

<b>Congress Fund</b>	\$ 0	\$ 2,000	\$ (2,000)
<b>Education Fund</b>	\$ 0	\$ 1,600	\$ (1,600)
<b>Permanent Fund</b>	\$ 0	\$ 1,750	\$ (1,750)
<b>Life Member Fund – New Members</b>	<u>\$ 0</u>	<u>\$ 700</u>	<u>\$ (700)</u>
<b>Total</b>	<b><u>\$ 0</u></b>	<b><u>\$ 6,050</u></b>	<b><u>\$ (6,050)</u></b>
<b>Net Surplus/(Deficit)</b>	<b><u>\$ 9,705</u></b>	<b><u>\$ 1,775</u></b>	<b><u>\$ 7,930</u></b>

Notes to Income Statement:

1. Receipts – Total receipts for the first 9 months of \$95,746 were \$(5,939), or 6%, below the annual budget, primarily due to: lower Annual Dues Received NSSAR \$(3,520) and transfers not completed from the Education Fund \$(2,500). Major variances to budget receipts were:
  - a. Receipts for NSSAR and CASSAR regular annual dues were below budget by \$3,905 due to fewer annual members than budgeted.
  - b. Transfers from the investment account for life member dues were below budget by \$(18,605) due to no transfers being made.
  - c. Receipts for donations exceeded budget by \$5,392 due to an unbudgeted donation from Intel of \$4,900.
2. Expenses – Total operating expenses for the first 9 months were over budget by \$7,819, primarily due to the SAR Foundation Donation of \$16,760 being over budget. An additional \$18,605 may be transferred from the Investment Accounts to Life Membership Dues accounts late this fiscal year to offset the corresponding expenses. Most of the committee and program expenses are under budget.
3. Transfers To (From) the Investment Account – Total transfers for the first 9 months of 2020 were zero. Annual transfers will be reviewed late this fiscal year to determine if necessary and to what amount to offset dues cost for life members to both the chapters and national.

### **BALANCE SHEET**

The Balance Sheet as of September 30, 2020 shows the following balances:

**Assets:**

Cash and Savings Account – Bank of America	\$ 30,834
Investment Account – Morgan Stanley	\$458,095
Prepaid Expense – Deposit for BOM meeting	\$ 3,500
<b>Total Assets</b>	<b><u>\$492,429</u></b>

**Equity:**

Equity Accounts	\$ 271,558
Retained Earnings	<u>\$ 220,871</u>
<b>Total Equity</b>	<b><u>\$ 492,429</u></b>

<b>Total Liabilities &amp; Equity</b>	<b><u>\$492,429</u></b>
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## **TREASURER ACTIVITIES – 2020**

### Tax and Regulatory Agency Forms Filed for CASSAR (*previous Treasurer*)

1. IRS Form 990-EZ with Schedules A, B and O
2. California Form 199 with 12 Attachments
3. IRS Forms 1099 and 1096 – For Youth Awards
4. California Form RRF-1 – Charitable Trust Registration
5. California Form CT-NRP-2 – Raffle Report
6. D&O and General Liability Insurance Policies with NIAC.

### National Society Committees

1. Audit Committee – (September 2020 – Present)
2. Oration Committee – (July 2018 – Present)

**The California Society of the Sons of the American Revolution  
Silicon Valley Chapter Board of Managers Meeting Report  
November 2020**

**2020 Chapter Meetings**

- Two chapter meetings were held during 2020. COVID 19 regulations prevented any in-person meetings after February 2020. No Zoom meetings were held.

**SAR Programs in which Chapter Participated in 2020**

- SAR Knight Essay Contest so far has one entry; a second entry is in process.
- CASSAR Officers from Silicon Valley Chapter SAR: CASSAR VP Membership, Douglas Bergtholdt; CASSAR Genealogist, Terry Briggs.

**2020 Events**

- (none)

**2020 Color Guard Events**

- Four Chaplains Memorial Service in San Jose, CA. in February 2020
- COVID 19 regulations prevented any further color guard events

**2020 Principal Chapter Officers**

- President: Richard Ferman
- Secretary: Ranney Thayer
- Treasurer: (none - vacant)
- Registrar: Terry Briggs
- Vice President Programs: (none - vacant)
- Vice President Membership: Douglas Bergtholdt

**Membership Summary**

o Number of members as of January 1, 2020	110
o Number of new members into the chapter in 2020	+9
o Number of members transferring out in 2020	- 3
o Number of members as of November 5, 2020	116

**Financial Information**

Signatories on chapter bank account: Terry Briggs, 2020 chapter Registrar.

Chapter bank:	Chase Bank
Last 5 digits of chapter bank account:	... 25901
Chapter bank account balance as of October 31, 2020	\$31,724.67
Chapter Treasurer:	(none - vacant)

Federal & California tax filings: Tax Forms 199-n and 990-n were filed in March, 2020.

All invoices for the 2021 chapter dues were mailed on November 5, 2020.

**2020 Chapter Assets Exceeding \$100.00**

- Checking Account Balance: Check Book is in possession of 2020 SVSAR Registrar
- Chapter Flags & donated loaner uniform in possession of 2020 SVSAR Registrar
- Other chapter items (gavel, SAR emblem, etc.) are in possession of 2020 SVSAR President

Respectfully submitted,

Ranney Thayer  
2020 SVSAR Secretary