

# ***“The Book”***

***The California Society  
2021 Annual  
Report***

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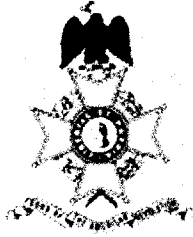
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# ***Section one***

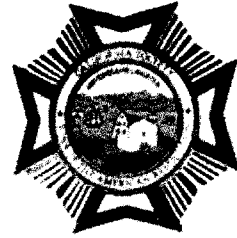
## ***Executive Board Reports***

### ***Reports:***

***Presidents Report***  
***Executive Vice Presidents Report***  
***Vice President Norths Report***  
***Vice President Souths Report***  
***Vice President Membership***  
***Secretary Report***  
***Treasurers Report***  
***Genealogist Report***  
***Surgeon Report***



**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**

**NSSAR DAR Committee, via Zoom — September 25, 2020**

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

**CASSAR Board of Managers Meeting, via Zoom — November 14, 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**

**Sacramento Chapter — 3 monthly meetings and 3 Executive Committee Meetings, 2021**

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

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

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

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

**Gold Country Chapter, Auburn, — September 19, 2020**

**Gold Country Chapter, via Zoom — October 17, 2020**

**Gold Country Chapter, via Zoom — xx, 2020**

**Gold Country Chapter, via Zoom — February 20, 2021, 2020**

**Harbor Chapter, via Zoom — September 3, 2020**

**Harbor Chapter, via Zoom — xx, 2021**

**Harbor Chapter, via Zoom — xx, 2021**

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

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

**Mother Lode Chapter, Placerville — January xx, 2021**

**Mother Lode Chapter, Placerville — February xx, 2021**

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

**Orange County Chapter, Santa Ana —, 2021**

**Orange County Chapter, Santa Ana —, 2021**

**Orange County Chapter, Santa Ana —, 2021**

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

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

## **President's Annual Report continued:**

**Redlands Chapter**, via Zoom — June 20, 2020  
**Redwood Empire Chapter**, Sonoma — February 21, 2020  
**Redwood Empire Chapter**, Sonoma —, 2021  
**Riverside Chapter**, via Zoom — September 12, 2020  
**Riverside Chapter**, via Zoom — xx, 2021  
**Thomas Jefferson Chapter**, Concord — January 18, 2020 New Officer Installation  
**Thomas Jefferson Chapter**, via Zoom — June 27, 2020  
**Thomas Jefferson Chapter**, via Zoom — September 19, 2020  
**Thomas Jefferson Chapter**, via Zoom — October 17, 2020  
**Thomas Jefferson Chapter**, via Zoom — November 21, 2020  
**Thomas Jefferson Chapter**, via Zoom — xx, 2021  
**Thomas Jefferson Chapter**, via Zoom — xx, 2021  
**Thomas Jefferson Chapter**, via Zoom — February 20, 2021, 2021  
**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  
**Oak Chan Elementary, Folsom** — March & April 2021 — 3 Classrooms  
**Oak Chan Elementary, Folsom** — Sydney Wilson: Chapter Winner, CASSAR Winner, 3<sup>rd</sup> National  
**Sandra J Gallardo Elementary, Folsom** — February 6, 2020 — 3 Classrooms  
**Sandra J Gallardo Elementary, Folsom** — March & April 2021 — 3 Classrooms

### **JROTC Presentation**

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

### **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

**President's Annual Report continued:**

**National Color Guard Events**

**Battle of Cowan's Ford – January 29, 2021**

**Battle of Kettle Creek-- February 13, 2021**

**Battle of Moores Creek – February 27, 2021 Greetings and Wreath Presentation**

**Battle of Guilford Courthouse – March 13, 2021 Wreath Presentation**

**Other National Events:**

**George Washington's Birthday Celebration at Mt. Vernon, VA – February 22, 2021**

**Public Service Awards:**

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

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

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

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

**Secretaries Meetings:**

**October 21, 2020**

**November 18, 2020**

**December 16, 2020**

**January 20, 2021**

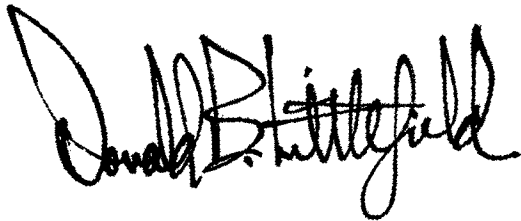
**February 17, 2021**

**Compliance Meetings:**

**February 24, 2021**

**March 24, 2021**

**April 28, 2021**

A handwritten signature in black ink, appearing to read "Donald B. Littlefield". The signature is stylized with large, flowing letters and a prominent initial "D".

Respectfully,  
Donald B Littlefield  
President  
California SAR

**CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION**  
**OFFICER REPORT**  
**4/1/2021**  
**EXECUTIVE VICE PRESIDENT**

I have been privileged to serve as part of the executive leadership team under the direction of President Don Littlefield and committed Compatriots Craig Anderson, Jim Klingler, Fred Schuster, and John Ferris. Our monthly and special meetings have been purposeful and productive with an eye towards better ways to serve our chapters, improve the accuracy of our data, and the timely submission of required reporting information.

My duties included serving as Chair of both the Budget and the Audit Committees. With the help of many long serving Compatriots the CASSAR adopted a 2021 California Society Budget at the November Board of Managers meeting; and the Audit Committee reported no findings and complemented our Treasurer for his good work. I also served as the editor of the award-winning California Compatriot Newsletter, responsible for the publication of three editions during my term of office. Please continue to send in photos and listings of your chapter activities.

I was able to attend the Daughters of the American Revolution (DAR) and Children of the American Revolution (CAR) Liaison Committee meetings at the virtual NSSAR Fall Leadership.

I have not yet been able to visit every chapter in person but have enjoyed the opportunity to Zoom in with chapters and look forward to attending more chapter meetings as they begin to return to in person meetings. Please make sure your chapter meeting information is updated and correctly posted on the CASSAR Website.

Planning is well underway for the 2021 Fall Annual Board of Managers meeting November 4-7 at the Mission Inn in Riverside; additional information is available on the CASSAR website.

Respectfully Submitted,  
Brian Stephens



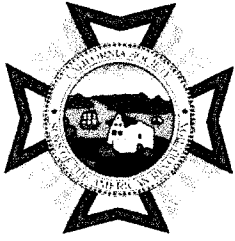


**California Society  
National Society Sons of the American Revolution  
Vice President - North  
146<sup>th</sup> Annual CASSAR Meeting  
April 17, 2021**

The following is a list of my activities on behalf of the CASSAR for the past 12 months:

- I presented a JROTC award to a cadet at a virtual event at Pacific High School in Sacramento.
- I presented a SAR Life Saving Medal to Officer Nolan McManus at the Woodland, CA Police Department.
- I presented a SAR 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 participated in "period" uniform at an Independence Day Event in Folsom, CA.
- 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 several virtual CASSAR Open Forums on membership dues and other administration issues hosted by CASSAR Secretary, Fred Schuster.
- I hosted 10 virtual Zoom meetings of the Sacramento Chapter membership.
- I participated in monthly operations meetings hosted by President Littlefield.
- I published ten issues of the Sacramento Chapter Compatriot.
- I attended virtual chapter meetings of the Thomas Jefferson Chapter, the Redwood Empire Chapter, the San Francisco Chapter, the Mother Lode Chapter, and the Yosemite Chapter.

Dr. Craig Anderson  
Vice President-North  
California Society SAR  
Telephone (916) 257-7892  
Email: craigandersonsar@gmail.com



**The California Society of the  
Sons of the American Revolution  
VICE PRESIDENT – SOUTH  
OFFICER'S REPORT  
146<sup>th</sup> Annual Meeting  
March 15, 2021**

**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 restrictions resulting from the COVID-19 pandemic have limited in-person Chapter meetings; however I am pleased that I was able to attend a number of your virtual 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 12 months are listed below:

California Society SAR:

- 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.
- 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 for Chapter Officers on membership dues and the reconciliation report hosted by CASSAR Secretary, Fred Schuster on September 5.
- Participated in the CASSAR Fall Board of Managers Meeting on November 14, 2020.
- Established the CASSAR Chapter Speakers Bureau by assembling a list of CASSAR speakers on various topics related to the SAR who are available to speak at Chapter meetings, and posting it on the CASSAR website on November 20, 2020.
- Led the CASSAR Open Forum workshop for Chapter Officers on preparing reports for compliance with government agencies on February 24, 2021.
- Participated in the monthly CASSAR Executive Committee meetings on May 5, June 2, July 7, August 4, September 1, October 6, November 3 and December 1, 2020, and January 5, February 2, and March 2, 2021.

California Society SAR Chapters:

- 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 4, 2020. This event was covered by two local television stations which gave the SAR great visibility.

- Attended and participated in the Color Guard for the SAR Orange County Chapter Memorial Service for Compatriot Jim Blauer on October 10, 2020, and in monthly virtual Chapter meetings on November 7 and December 12, 2020, January 9 and February 13, 2021, and an in-person Chapter meeting on March 13, 2021.
- Attended the SAR Redlands Chapter virtual meetings on November 21, 2020 and January 16, 2021.
- Attended the SAR Harbor Chapter virtual meeting on December 3, 2020.
- Attended the SAR Riverside Chapter virtual meeting on January 19, 2021.
- Attended the SAR Sons of Liberty Chapter virtual meeting on January 23, 2021.
- Attended the SAR San Diego Chapter virtual meeting on January 23, and February 20, 2021. I was honored to install the Chapter officers at the January 23 meeting.

National Society SAR:

- As Chairman of the NSSAR Finance committee, I conducted a virtual Zoom meeting with the Finance, Budget, Investment and Audit committees on September 21, 2020 and March 1, 2021. We reviewed the financial results of the SAR through 6 and 12 months, 2020, the Budget for 2021 and the Investment Fund results for 2020. Also, as a national committee chairman, I attended the EXCOM meetings on October 23, and November 3, 2020, and on February 1, and March 1, 2021, and the Trustees meetings on December 5, 2020 and March 6, 2021.
- As Vice Chairman of the NSSAR Investment Committee, I participated in a meeting of the committee with Fifth Third Bank on September 3, 2020 and January 11 and January 22, 2021 to discuss and approve the 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*

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



**April 1, 2020 Officer Report  
Vice President of Membership (Interim)  
James Bunker, PhD**

CASSAR President Donald Littlefield asked if I would be willing to serve as acting vice president of membership for CASSAR after attending a Harbor chapter meeting where I serve as the Vice-President. It is my pleasure to fill the position in an acting capacity and I am standing for election at the April 17, 2021 CASSAR meeting to further serve in a permanent capacity. I am eager to provide a transparent, efficient, and communicative experience that connects new members with their local chapters and provides personalized contacts to facilitate that experience.

The first thing I did was implement a singular process and message for all potential new member leads that were generated from SAR and CASSAR's websites. Currently, when I receive a new lead I identify the relevant chapter, generate a standard message for the potential applicant and include both the chapter's president and registrar in that message. I think it is essential that they have a local contact for a personal touch and different chapters have similar but different protocols for how they choose to proceed with new members. It would be helpful if individual chapter officers check their chapter officer information on the CASSAR webpage to make sure officer contacts are up to date. If information is not correct please email the CASSAR President, Secretary, Vice President of Membership, and Webmaster so the appropriate changes can be made.

**Below is a copy of the standard message sent to potential new members:**

Mr. Potential Applicant Name

Compatriots Chapter President and Registrar Names

(Please See Below for Contact Information and Provide Further Assistance)

Thank you your interest in membership in the Sons of the American Revolution (SAR) and for requesting further information about the SAR in California. New member applications are coordinated and submitted by one of the 24 California local SAR chapters. Your closest SAR chapter is the [Silicon Valley Chapter]. I have included the chapter President and Registrar in this message so you can receive more information about applying for membership in the SAR. This chapter will guide you through the SAR membership application process and membership application requirements. I have included below a list of chapter officers and a link to their chapter webpage. I would encourage you to attend an SAR chapter meeting and many chapters are holding virtual meetings via zoom at this time. You can also find more general information about the SAR on the California Society Sons of the American Revolution (CASSAR) web page.

<https://www.californiasar.org/about-the-sons-of-the-american-revolution/>

Note: Individual Chapter Officers with Contact Information and Chapter Information is also provided

## **New Member Chapter Referrals**

I have developed a database and process to keep track of new member leads and names that were generated through the SAR and CASSAR webpages. **Sixty potential members** contacted me, and I provided them with more information about CASSAR and referred them to individual chapter presidents and registrars. In addition, I responded to numerous inquiries about SAR and CASSAR in general. Below is a breakdown of chapters who received new member referrals from February 7<sup>th</sup> through March 31<sup>st</sup> while I have been serving as Vice President of Membership in an acting capacity.

<u>Delta Chapter</u>	1
<u>Eagle Chapter</u>	2
<u>General George Washington Chapter</u>	1
<u>General George S. Patton, Jr. Chapter</u>	2
<u>Gold Country Chapter</u>	3
<u>Harbor Chapter</u>	5
<u>Monterey Bay Chapter</u>	2
<u>Mother Lode Chapter</u>	4
<u>Redlands Chapter</u>	2
<u>Redwood Empire Chapter</u>	3
<u>Sacramento Chapter</u>	2
<u>San Diego Chapter</u>	5
<u>San Francisco Chapter</u>	6
<u>Silicon Valley Chapter</u>	8
<u>Sons of Liberty Chapter</u>	5
<u>South Coast Chapter</u>	3
<u>Thomas Jefferson Chapter</u>	5
<u>Yosemite Chapter</u>	1
Totals:	60

**California Society  
State Secretary  
Annual Report**

January 1, 2020 to December 31, 2020

**Reporting Date; March 31, 2021**

**Submitted by: California State Secretary  
Frederick Schuster**

**Summary:**

The 2020 annual year has been an extremely busy year for the California State Secretary as there have been several projects that the secretary has worked on to help make the position less time consuming, however the position still demands fifty (50) plus hours a week to keep pace with all the activities required of the position.

The society now has a master numbering system, where almost every number issued from the very first number to the current number that was assigned to a CASSAR Member has been identified. All duplications of CASSAR numbers have been removed from the California State roster. In 2019 there were 234 anomalies in the state roster with many members sharing a duplicate state number as there was no cross-check procedure in place to ensure that a number was not issued more than once.

During 2020, the California Society has completed a project and now has a complete compliment of Record Copies of all members going back to 1995, with the exception of about 80 members; these 80 Record Copies appear to be from transfer members or are from Dual members where a Record Copy was not required. The California Society Secretary now requires that all members requesting Dual State Membership or are transferring their membership into the California society, submit a Record Copy along with their application for membership.

The challenge is to now assign a number to all Dual Members and get Record Copy's for the CASSAR files and to complete the Record Copy files back to 1995 so that the holes in the Record Copy system can be filled. In mid-February the California Society Secretary requested Record copies for all Dual Members from NSSAR so a California number could be issued and the Record Copy could be entered into the CASSAR Record Copy Data Base. If a transfer member does not provide a copy of his Record copy or does not have one, the California Society Secretary will order one for the member at cost the cost that NSSAR the California Society to order the Record Copy.

The California Patriot system will have a complete set of California Record Copies going back to 1985, the California Secretary would like to have a full complement of CASSAR Record Copy's to coincide with the NSSAR Patriot Research System in our CASSAR Data Base for our members to draw on if necessary, to have save time and money and to provide a valuable service to or membership. The Record Copies are on disc and will need to be copies and scanned individually as time permits.

The Record Copies for Supplemental applications is not as complete for a variety of reasons, however a complete set of supplemental Record Copies dating back to 2019 and many prior to this date have been entered into the California System.

The California Society nominated several members for Emeritus status in 2020 and we will continue to look for members that qualify for this distinction. The California Society currently has seventeen (17) Emeritus members.

A format to enter information into the Master Roster and the yearly CASSAR roster has been standardized to make data entry faster and easier for the secretary.

All the CASSAR data that had been stored on multiple jump drives has been consolidated onto one external hard drive for easy storage and retrieval, making the entry of data much faster for the state secretary and easier to find.

In 2020 the California Society State Secretary has focused on cleaning the membership files and reconciling the state records with the chapters and the NSSAR.

In 2020, the California Society completed the first part of the state's reconciliation report on time for the first time in many years. The state reconciled membership, to the member and to the penny, I am happy to report to the society, due to the hard work of all the chapters the CASSAR Reconciliation Reporting process was completed by February 19, 2021 and normal activities could resume.

The California Society had 1,620 members on January 1, 2020 and on December 31, 2020 the California Society membership was 1,916, however, on January 1, 2021 after the 2021 dues campaign the California Society Membership dropped to 1,652, showing a net gain in membership of 32 members, which were primarily transfers and reinstated members.

During 2020, the state secretary processed 296 new member transactions which consisted of transfers, reinstalments, and new members. The state secretary processed 264 losses for the year, which included resignations, dropped members and transfers. In addition, the state secretary processed 84 supplemental applications, 3 memorial applications and 31 death notices.

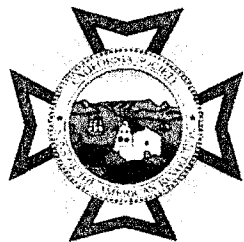
During 2021 the California Secretary will continue to find ways to streamline the position and reduce the number of hours required to complete the varied duties of the position. Several of the larger state societies have added an administrative position in addition to the state secretary's position to handle some of the less routine items that deal with state business such as the collection of the reports, delegates, changes in chapter management and other activities which keeping track of who does and does not send in information.

<b>ANNUAL REPORT RECONCILIATION for (State Society):</b>	<b>CA</b>
<b>Active Membership as of 01/01/2020:</b>	1620
Plus: New Regular Members:	190
Plus: New Jr Members	21
Plus : New Memorial Members:	3
Plus : Transfer In:	2
Plus : Reinstatements:	76
Plus : Reinstatements-Transfers:	4
<b>Total Additions:</b>	296
Less : Deceased:	28
Less : Deceased Memorial:	3
Less : Resignations:	5
Less : Transfers Out:	12
Less : Dropped:	216
<b>Total Losses:</b>	264
<b>Membership Gain / Loss:</b>	32
<b>Total Active Members as of 01/01/2020:</b>	1620
Plus / Less: Membership - Gain / + Loss:	32
<b>Total Active Members as of 01/01/2021:</b>	1652
<b>DUES CALCULATION</b>	
<b>Total Active Members as of 01/01/2021:</b>	1652
Less: Emeritus Members:	17
Less: National Regular Life Members:	44
Less: All Junior Members:	109
Less: Sep-Dec New Regular Members:	67
Less: Sep-Dec Regular Member Reinstatements:	11
Less: Sep-Dec Regular Member Reinstatement-Transfers:	2
<b>Total Adjustment to Membership:</b>	250
<b>Total Billable Regular Members:</b>	1402
<b>Dues Owed for Regular Membership: X \$35 =</b>	\$49,070
<b>Total Active Junior Members as of 01/01/2021:</b>	109
Less: National Junior Life Members:	0
Less: Sep-Dec New Junior Members:	7
Less: Sep-Dec Junior Member Reinstatements	1
Less: Sep-Dec Junior Member Reinstatement-Transfers	0
<b>Total Billable Junior Membership X \$5.00:</b>	101
<b>x \$5 =</b>	\$505
<b>Total Billable Membership:</b>	\$49,575
<b>Total Received</b>	\$48,995
<b>Amount (Over)/Under:</b>	\$580



## ***Membership of California Society by Year***

Chapter	Chapter #	2018	2019	2020	2021
Central Coast	27	24	25	26	23
Coachella Valley	36	36	33	35	35
Delta	29	34	33	30	33
Eagle	41	21	19	21	18
Gen Geo Patton	26	78	94	94	81
Gen Geo Washinton	39	66	44	45	50
Gold Country	7	55	59	61	58
Harbor	22	67	58	52	57
Kern	38	38	41	58	68
Montrey Bay	27	26	26	26	25
Mother Lode	40	36	24	23	26
Orange County	23	144	153	146	152
Redlands	35	23	22	24	33
Redwood Empire	28	58	58	57	62
Riverside	8	104	114	117	103
Sacramento	9	185	175	177	182
San Diego	2	180	159	165	162
San Francisco	1	52	55	65	64
Santa Barbara	24	30	26	23	32
Silicon Valley	5	120	108	110	113
Sons of Liberty-LA	30	138	113	105	84
South Coast	32	54	41	55	61
Thomas Jefferson	10	104	108	103	103
Yosemite	42	10	11	19	27
		1683	1599	1637	1652



**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 DECEMBER 31, 2020 TWELVE-MONTHS ACTUAL COMPARED TO FULL-YEAR BUDGET

The following are the operating receipts and expenses for the fiscal year ending  
December 31, 2020:

#### INCOME STATEMENT

	12 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)	\$ 5,980	\$ 6,000	\$ (20)
I-03B · LM Annual NSSAR Dues (from Inv acct)	\$ 9,415	\$ 9,625	\$ (210)
I-04 · LM Dues for Chapters (from Inv acct)	\$ 2,990	\$ 3,000	\$ (10)
I-05 · New Member CASSAR Dues	\$ 3,780	\$ 3,000	\$ 780
I-06 · Supplemental App State Fee	\$ 860	\$ 750	\$ 110
I-08 · Bank Account Interest	\$ 2	\$ 10	\$ (8)
I-09 · Reinstated Member Fee	\$ 1,985	\$ 1,000	\$ 985
I-14 · Interest Income-San Diego Fund	\$ 816	\$ 1,600	\$ (784)
I-16 · New Life Member Dues	\$ 3,056	\$ 700	\$ 2356
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>\$ 117,346</u></b>	<b><u>\$ 101,685</u></b>	<b><u>\$ 15,661</u></b>

**Executive Committee Expenses**

A-01 · President Expenses	\$ 0	\$ 500	\$ (500)
A-02 · Executive VP Expenses	\$ 400	\$ 300	\$ 100
A-03 · VP North Expenses	\$ 0	\$ 100	\$ (100)
A-04 · VP South Expenses	\$ 0	\$ 100	\$ (100)
A-05 · VP Membership Expenses	\$ 0	\$ 1,000	\$ (1000)
A-06 · Executive Secretary Expenses	\$ 1,651	\$ 1,600	\$ 52
A-07 · Treasurer Expenses	\$ 76	\$ 300	\$ (224)
A-08 · Registrar Expenses	\$ 783	\$ 700	\$ 83
A-09 · Genealogist Expenses	\$ 0	\$ 100	\$ (100)
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>\$ 2,910</b>	<b>\$ 5,100</b>	<b>\$ (2,189)</b>

**Committee Expenses**

B-21 · Awards & Medals Committee Expenses	\$ 2,498	\$ 1,500	\$ 998
B-22 · Best Chapter Contest Expenses	\$ 236	\$ 650	\$ (414)
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	\$ 1,220	\$ 1,970	\$ (750)
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	\$ 552	\$ 500	\$ 52
B-42 · Fall Meeting Allowance	\$ 0	\$ 500	\$ (500)
B-43 · Visiting PG Expenses	\$ 0	\$ 1,900	\$ (1,900)
B-44 · Sea Cadets Expenses	\$ 99	\$ 200	\$ (101)
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>\$ 12,801</b>	<b>\$ 24,230</b>	<b>\$ (11,429)</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	\$ 50,875	\$ 53,375	\$ (2,500)
E-02 · LM Dues to Chapters	\$ 2,980	\$ 3,000	\$ (20)
E-03 · Filing Fees	\$ 95	\$ 100	\$ (5)
E-10 · General Liability Insurance	\$ 340	\$ 365	\$ (25)
E-11 · D&O Liability Insurance	\$ 288	\$ 265	\$ 23
E-25 · Software and Computer Supplies	\$ 0	\$ 0	\$ 0
E-30 · Storage Rent & Supplies	\$ 708	\$ 750	\$ (42)
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	\$ 950	\$ 0	\$ 950
E-75 – Bank Fee	\$ 15	\$ 0	\$ 15
E-80 · Credit Card Fees	<u>\$ 0</u>	<u>\$ 25</u>	<u>\$ (25)</u>
<b>Total Other Operating Expenses</b>	<b><u>\$ 74,011</u></b>	<b><u>\$ 60,880</u></b>	<b><u>\$ 13,131</u></b>

<b>Total Operating Expenses</b>	<b><u>\$ 90,813</u></b>	<b><u>\$ 93,860</u></b>	<b><u>\$ (3,047)</u></b>
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<b>Net Operating Surplus/(Deficit)</b>	<b><u>\$ 26,533</u></b>	<b><u>\$ 7,825</u></b>	<b><u>\$ 18,708</u></b>
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**E-51 · Transfers to (from) Investment Accounts**

Congress Fund	\$ 2,440	\$ 2,000	\$ 440
Education Fund	\$ 7,023	\$ 1,600	\$ 5,423
Permanent Fund	\$ (10,308)	\$ 1,750	\$ (12,058)
Life Member Fund – New Members	\$ 4,386	\$ 700	\$ 3,686
Unallocated Fund	<u>\$ 14,844</u>	<u>\$ -</u>	<u>\$ 14,844</u>
<b>Total</b>	<b><u>\$ 18,385</u></b>	<b><u>\$ 6,050</u></b>	<b><u>\$ 12,335</u></b>

<b>Net Surplus/(Deficit)</b>	<b><u>\$ 8,148</u></b>	<b><u>\$ 1,775</u></b>	<b><u>\$ 6,373</u></b>
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Notes to Income Statement:

1. Receipts – Total receipts for the year of \$117,346 were \$15,661, or 15%, over the annual budget, primarily due to: transfers from the unallocated fund \$14,760, and donations \$5,392, partially offset by 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 \$(240) due to the number of actual life members lower than budgeted..
  - c. Receipts for donations exceeded budget by \$5,392 due to an unbudgeted donation from Intel of \$4,900.
2. Expenses – Most Committee and Program Expenses were under budget. Operating Expenses were over budget by \$13,131 due to the \$17,760 donation to SAR Education Center & Museum. This expenditure was approved and recorded in the Fall 2019 Meeting Minutes. Total Operating Expenses were under budget by \$3,047.
3. Transfers To (From) the Investment Account – Total net transfers for the year of 2020 were zero. As the budget ended with a surplus, there was no need for the transfers.

**BALANCE SHEET**

The Balance Sheet as of December 31, 2020 shows the following balances:

**Assets:**

Cash and Savings Account – Bank of America	\$ 32,553
Investment Account – Morgan Stanley	\$499,817
<b>Total Assets</b>	<b>\$532,370</b>

**Equity:**

Equity Accounts	\$ 271,558
Retained Earnings	<u>\$ 260,812</u>
<b>Total Equity</b>	<b><u>\$ 532,370</u></b>
<b>Total Liabilities &amp; Equity</b>	<b><u>\$532,370</u></b>

## **TREASURER ACTIVITIES – 2020/2021**

### Tax and Regulatory Agency Forms Filed for CASSAR

1. IRS Forms 1099 and 1096 – For Youth Awards
2. D&O and General Liability Insurance Policies with NIAC.

### National Society Committees

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

### State Society Committees

1. Oration Contest Chairman – (April 2018 – Present)

### Chapter Committees

1. Brochure Contest Chairman – (June 2016 – Present)
2. Oration Contest Chairman – (June 2020 – Present)
3. Color Guard Co-Commander – (January 2020 – Present)

## **April 2021 Annual Report of the Genealogist, California State Society, Sons of the American Revolution, April 2020 to April 17, 2021**

Reporting Date: April 17, 2021  
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 and 2021 the CASSAR Genealogist has continued monitoring and weekly reporting of the number of pended CASSAR applications. During 2020-2021 CASSAR has had, at any one time, 7 to 22 pended applications. Currently there are 18 CASSAR 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 2020-2021 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) Phase 1 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.

100% of the approximately 7,800 total CASSAR post 1984 lineages have now been entered into the SAR PRS by about 50 CASSAR data entry volunteers over a 3 year period of time. Data entry for each lineage takes approximately 30 minutes and requires another 15

minutes to review and publish to the SAR PRS data base. 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.

All 24 CASSAR chapter's post 1984 record copies have been entered into the SAR PRS as Phase 1. CASSAR SAR PRS Phase 2 data entry has recently begun to update CASSAR unique Patriot Records (approximately 2,800 Patriot Records) in the SAR PRS. This work is being coordinated by Jim Faulkinbury and Randy Dhindsa.

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

During 2020-2021 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 March 11, 2021 and since the Fall of 2015, approximately 3,250 CASSAR applications have been started in the SAR Online Application System and approximately 1,320 applications have been approved for application forms created and printed using the SAR Online Application System.

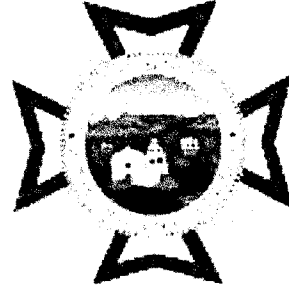
All chapter Registrars should be checking regularly their Online System "Chapter Dashboards" to view new applications started by applicants themselves in the Online System. Chapter Registrars should immediately contact applicants starting applications to provide the applicants information about the SAR, the SAR application process, the SAR application requirements and to provide coordination and guidance for completing and submitting SAR applications to published SAR application standards. 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 to begin the application review process, 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 published 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 Revolutionary War 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.





## **2020 Report of the Surgeon, California Society Sons of the American Revolution**

March 7, 2021

Mr. Donald Littlefield  
President, California Society Sons of the American Revolution  
c/o Mr. Fred Schuster, CASSAR Secretary  
Submitted Via Email: [schuster6789@aol.com](mailto:schuster6789@aol.com)

Dear CASSAR President Littlefield and Fellow Compatriots:

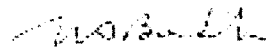
It has been my great honor to have served as CASSAR Surgeon since 2017. Please accept this as my report and let me know if you have any comments, suggestions or concerns. Following is a summary of my activities as CASSAR Surgeon:

- I. Medical History of George Washington Talk
  - a. I have given or plan to give this talk to the following meetings
    - i. Thomas Jefferson Chapter – Jan 16, 2021
    - ii. Orange County Chapter – Feb 13, 2021
    - iii. Battle Born Patriots Chapter, Reno, NV – Feb 20, 2021
    - iv. Harbor Chapter – Mar 4, 2021
- II. Using DNA in Genealogy Talk
  - a. I have given or will give this talk to the following meetings
    - i. Gold Country Chapter SAR – Oct 17, 2020
- III. I continue to serve on the NSSAR Medical Committee under current NSSAR Surgeon General Dr. Darryl Addington.
  - a. 2018-2020 Medical Committee Goals:
    - i. Provide medical information to SAR members through the Surgeon General Reports at NSSAR meetings and through SAR Magazine
    - ii. Explore medical screening for SAR members and guests at a National SAR Meeting in Washington State in July 2021; and
    - iii. Promote awareness to potential SAR members about the importance of American Revolutionary military and civilian medicine through talks and demonstrations to library groups, historical/genealogical societies, veterans' organizations, etc.

- iv. Continue to support the Challenge Coin Project now led by Dr. Addington honoring physicians & surgeons of the Revolution continues. Eight coins have been made thus far.
  - v. I will support any other initiative from the NSSAR Surgeon General.
- IV. Clinical Activities
  - a. As a physician, I have provided general medical and COVID19 information to the CASSAR and specific chapters in accordance to the public health guidance of the State of California.

Thank you for allowing me to serve as your Surgeon of the California Society. Please let me know if you have any specific ideas so I can better serve the medical interests of the CASSAR.

Sincerely,



Matthew S. Bowdish, MD, FAAAAI, FACAAI  
2582 Creek Hollow Road  
Rocklin, CA 95677-5721  
916-549-4895  
matthewsbowdish@gmail.com

# ***Section Two***

## ***Committee Reports***

## ***Reports***

### ***Reports:***

***Bylaws Committee Report***  
***Public Service and Heroism Report***  
***JROTC/ROTC Report***  
***Sea Cadet Report***  
***Valley Forge Teachers Recognition Report***  
***Spirit of America Report***  
***Chief of Protocol Report***  
***8<sup>th</sup> Grade Americanism Poster Report***  
***Joseph s. Rumbaugh Historical Oration Report***  
***Eagle Scout Report***  
***Handbook Committee Report***  
***Color Guard Commanders Report***  
***DAR Liaison Report***  
***Information Technology Report***  
***Flag Committee Report***

## **Bylaws Committee**

Date of Report: March 23, 2021

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.

There were three proposed amendments for the Annual Meeting that were noticed to the chapter presidents (see attached).

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.

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# **CASSAR Bylaws Committee**

**Stephen Renouf • John Dodd, Esq. • Donald Littlefield**

## **Report to the Annual Meeting of the California Society, SAR**

**April 17, 2021**

### **Amendments of Bylaws.**

#### ***Bylaw 8, §4(b)(iv)***

At annual or board of managers meetings properly noticed, proposed amendments to the bylaws may be voted upon with such voting restricted to one vote for each chapter president (or his designee). Passage of the proposed amendment requires at least a two-thirds vote of the chapters present and voting at the meeting.

# **CASSAR Bylaw Proposals – April 2021**

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## **Proposal No. 1**

(Noticed to Chapter Presidents on 2/3/2021)

### **Bylaw 7, Section 6:**

#### **Current**

**Section 6—** Any Regular Member in good standing after April 12, 2014, who is also a NSSAR Life Member, and who shall make payment in accordance with a fee schedule established by the Executive Board with input from the Trustees of the Investment Funds shall become a CASSAR Life Member and shall thereafter be exempt from payment of all required annual dues to the California Society and his chapter within the California Society. The one-time payment shall be added to the CASSAR LIFE MEMBERSHIP FUND and the income therefrom shall be utilized to pay the annual dues components to this society and to the chapter to which he subsequently belongs. Members of CASSAR who have previously paid for a CASSAR Life Membership prior to April 12, 2014, will continue to have their dues payments cover NSSAR, CASSAR, and their chapter dues payments. Non-CASSAR members who obtain a CASSAR Life Membership plan shall thereafter be exempt from payment of all required annual dues to the California Society and his chapter within the California Society.

#### **Proposed**

**Section 6—** Any Regular Member in good standing after April 12, 2014, who is also a NSSAR Life Member, and who shall make payment in accordance with a fee schedule established by the Executive Board with input from the Trustees of the Investment Funds shall become a CASSAR Life Member and shall thereafter be exempt from payment of all required annual dues to the California Society and his chapter within the California Society. The one-time payment shall be added to the CASSAR LIFE MEMBERSHIP FUND and the income therefrom shall be utilized to pay the annual dues components to this society and to the chapter (pursuant to Bylaw No. 9, Section 5, Paragraph (a)) to which he subsequently belongs. Members of CASSAR who have previously paid for a CASSAR Life Membership prior to April 12, 2014, will continue to have their dues payments cover NSSAR, CASSAR, and their chapter dues payments. Non-CASSAR members who obtain purchased a CASSAR Life Membership plan shall thereafter be exempt from payment of all required annual dues to the California Society and his chapter within the California Society.

#### **Rationale**

To clarify the amount of dues paid to the chapter as defined in Bylaw No. 9, Section 5, Paragraph (a), to remove superfluous words, and to correct “obtain” to “purchase.”

**The Bylaws Committee recommends approval of the proposal.**

# **CASSAR Bylaw Proposals – April 2021**

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## **Proposal No. 2**

(Noticed to Chapter Presidents on 3/15/2021)

### **Bylaw 2, Section 3(a):**

#### **Current**

(a)—The financial statement included in the annual report for each chapter shall contain the following information for all accounts deposited with financial institutions: 1) The name and address of the financial institution; 2) The name, type and number of the financial account; 3) The date of the last statement and the account balance at that time; and 4) The names of the members or officers having signatory authority over the account.

#### **Proposed**

(a)—The financial statement included in the annual report for each chapter shall contain the following information for all accounts deposited with financial institutions: 1) The name and address of the financial institution; 2) The name, type, and number of the financial account; 3) The date of the last statement and the account balance at that time; ~~and~~ 4) The names of the members or officers having signatory authority over the account; ~~and~~ 5) An inventory of the non-cash assets held by the chapter.

#### **Rationale**

As a matter of compliance, 501(c)(3) nonprofit entities (CASSAR or Chapters) operating in the State of California are required by the Attorney General's Registry of Charitable Trusts to report our financial cash and non-cash assets (inventory). It is the fiduciary responsibility of the CASSAR when those in possession of non-cash assets change/die/move/resign/disappear or Chapter's fold, to recover those assets as we have legal requirements as to how they are to be disposed.

The California society has requested that the assets of the chapter be included into the chapters 2021 annual report, however there is no requirement in the Articles of Incorporation or in the CASSAR bylaws which require the chapters to report assets.

The insertion of one line into the California Society Bylaw No. 2 Section 3, paragraph 3 would require the reporting of the assets by the chapter and the compliance with California State 501 (c) requirements.

**The Bylaws Committee recommends approval of the proposal if the reportable inventory of non-cash assets is limited to those \$500 and greater.**

# **CASSAR Bylaw Proposals – April 2021**

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## **Proposal No. 3**

(Noticed to Chapter Presidents on 3/15/2021)

### **Bylaw 8, Section 1(g):**

#### **Current**

(g) Not less than twenty (20) days prior to the date of any annual or special meeting of the membership, the secretary shall transmit notice of the time, place and agenda thereof to each chapter secretary and to each member who, on the record date for notice of meeting is entitled to vote thereat. (Corp. Code §5511.) Notice shall be transmitted either electronically and by posting on the CASSAR website.

#### **Proposed**

(g) Not less than ~~twenty (20)~~ thirty (30) days prior to the date of any annual or special meeting of the membership, the secretary shall transmit notice of the time, place and agenda thereof to each chapter secretary and to each member who, on the record date for notice of meeting is entitled to vote thereat. (Corp. Code §5511.) Notice shall be transmitted either electronically and by posting on the CASSAR website.

#### **Rationale**

To reconcile the Bylaw 8 Section 1(g) with Articles of Incorporation Article XI.

The Bylaws Committee recommends approval of the proposal.



CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION

COMMITTEE REPORT

04/02/21

PUBLIC SERVICE AND HEROISM COMMITTEE

There are five approved awards in the PS&H category that the State Society presents semi-annually, and each Chapter is encouraged to present annually. The criteria for presentation of the five awards can be found in the NSSAR Handbook and is listed below. Chapters are encouraged to report award presentations using the on-line reporting form found on the NSSAR website under the Public Service and Heroism Committee heading. This information is used to produce a booklet of award recipients from each state society and is distributed at the National Congress awards luncheon. Printing costs are covered by a donation from the NASSAR George Washington Fellows.

**Heroism Medal and Certificate** is presented to those who demonstrate outstanding bravery and self-sacrifice in the face of imminent danger by performing acts which involve great personal courage and risk to the recipient.

**Life Saving Medal and Certificate** that maybe presented to honorees whose actions resulted in the saving of a human life without placing themselves in imminent danger. The medal is intended to recognize the actions of any person who was directly responsible for the saving of a human life or who prolonged a human life to the extent that the victim was still alive upon transfer to the care of medical authorities.

**The Law Enforcement Commendation Medal** is presented to those who have served with distinction and devotion in the field of law enforcement. The medal is intended to recognize exceptional service or accomplishment in the field of law enforcement. Eligibility is not limited to peace officers but extends to the entire range of persons who make and enforce the law to include but not limited to peace officers, attorneys, judges, prosecutors and legislators who have performed an exceptional act or service beyond that normally expected.

**The Fire Safety Commendation Medal** is presented to an individual for accomplishments and/or outstanding contributions in an area of fire safety and service. The award is not limited to firefighters. It may be presented to recognize a variety of fire safety and service that has evolved into a highly technical and skilled profession with constant study, development and involvement by numerous dedicated citizens with a single goal - protect human life and property by preventing injuries or casualties due to fire and chemicals.

**The Emergency Medical Services Commendation Medal** is presented to an individual for accomplishments and/or outstanding contribution in an area of emergency medical services. The award is intended for paramedics and certified Emergency Medical Technicians and others in the emergency medical field who have performed an act or service beyond that normally expected.

If Compatriots/Chapters have any questions concerning the SAR Public Service and Heroism Awards 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, Chairman

## **CASSAR Committee Report**

### **JROTC / ROTC Committee**

January 1, 2020 to December 31, 2020

Reporting Date: January 15, 2021

Submitted by: Brandon Villardi JROTC/ROTC Committee Chair

#### **JROTC/ROTC Committee Summary:**

This past year the JROTC/ROTC committee chair contacted each of the 24 chapters and reviewed the requirements of the CASSAR JROTC/ROTC Platform regarding the SAR Enhancement JROTC youth program. In November 2019 information was sent to each of the 24 Chapter Committee Chairs and the Chapter Secretary's regarding the program informing the chapters Committee Chairs of the 2019 – 2020 program rules.

In 2020 we had two chapters participate in the program and the following chapters.

A Sacramento

B Orange County

Each of these chapters had a participant that placed in the annual contest. CASSAR sent Chapter A's participant, Cadet Megan Lange, onto the NSSAR Congress to participate in the National Congress.



*California Society*  
*Sons of the American Revolution*

*Instituted October 22, 1875*  
*Organized July 4 1876, Incorporated February 17, 1930*



## **CASSAR Sea Cadet Program (NSCC/NLCC) - 2021 Annual Report**

Here is an excerpt from the Sea Cadet web link: <http://www.seacadets.org/about-nbcc>

“USNSCC is a national youth leadership development organization that promotes interest and skill in naval disciplines while instilling strong moral character and life skills through leadership and technical programs modeled after the Navy's professional development system.

USNSCC is comprised of two programs. The Naval Sea Cadet Corps (NSCC) program is for young people ages 13 through the completion of high school. Also included under the USNSCC umbrella is our junior program the Navy League Cadet Corps (NLCC), for young people ages 10 through 13.”

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 adopting a Sea Cadet unit in your area here is a link to locate the nearest one. <http://homeport.seacadets.org/secure/UnitDirectory.aspx>

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

### **California Society – Sea Cadet of the Year**

At the CASSAR 2020 Annual Meeting we approved a “Sea Cadet of the Year” recognition program.

Each local SAR Chapter may nominate a Sea Cadet, much like the Eagle Scout Program, to be the State “Sea Cadet of the Year”.

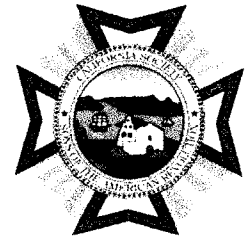
We look forward to awarding the first CASSAR “Sea Cadet of the Year” in 2021.

**Anyone interested in providing input to the committee should contact me directly.**

William E. Nay  
CASSAR Sea Cadet (NSCC/NLCC) Chairman  
707-235-1900  
[bill.nay@comcast.net](mailto:bill.nay@comcast.net)



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



**Valley Forge Teacher Recognition Program**

For 1 January 2020 to 31 December 2020

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.

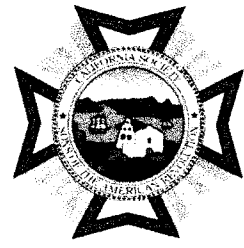
Respectfully submitted

***Robert L. Taylor***

Valley Forge Teacher Recognition Program Chairman



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



**Spirit of America Award Program**

For 1 January 2020 to 31 December 2020

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.

With the lessening of the Pandemic restrictions, attempts to reestablish the program will be made for the school year 2021.

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.

Respectfully submitted

*Robert L. Taylor*

Spirit of America Award Program Chairman

# **The California Society of the Sons of the American Revolution Chief of Protocol 2020 Report**

***For January 1, 2020 to December 31, 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. However, the California Society held a zoom for our spring and fall meetings and as the Protocol officer I assisted the State president with the introduction list of the National and State dignitaries.

Respectfully Submitted,

*Mark W. Kramer Chief of Protocol*



## Americanism School Poster Contest Report – 2020-21

March 16, 2021

Dear California Compatriots:

The Americanism School Poster Contest continues to be a successful program in spite of the pandemic which severely limited classroom visits. The 2021 topic is “The Sons of Liberty.” We will choose our state winner on Saturday at the Zoom Spring Meeting and that poster will go to National for judging at the National Congress in July.

In 2019-20 the theme was “The Boston Massacre.” CASSAR awards for went to:

FIRST PLACE: Sacramento Chapter - Sydney Wilson, Student Age 10 \$350

Oak Chan Elementary, Folsom, CA

SECOND PLACE: Gold Country Chapter - Student: Hudson Sasali Age 10 \$250

Lincoln Crossing School, Lincoln CA

THIRD PLACE: Orange County Chapter - Student Name: Jocelyn Tang Age: 11 \$150

Wittman Elementary, Cerritos, CA

FOURTH PLACE: Harbor Chapter - Student: Marisol Raya, Age 10 \$100

Caroldale Learning Community, Carson CA

Hon. Mention: San Diego - Student: Jack Dempsey \$75

Silver Strand Elementary, Coronado, CA

I want to thank compatriots for their continued support for this program, which helps us reach out to and educate our state’s youth and promote our society’s principles.

Sincerely,

*David A. Gilliard*

California Society of the Sons of the American Revolution

146th Annual Spring Meeting

Joseph S. Rumbaugh Historical Oration Report

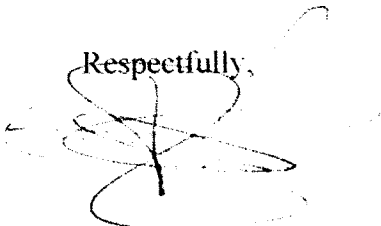
March 15, 2021

There have been two submittals for this year's contest: one from The Sons of Liberty Chapter and one from the Orange County Chapter. As of this date the winner has not been selected. The selection will be made prior to the annual Spring Meeting.

The website will be updated for the 2022 contest in May.

National contest judging will be similar to last year's event: the state societies will be submitting their contestant via recorded video to National for initial judging. The top 6 contestants will be invited to Congress in Renton, Washington for final judging.

Respectfully,

A handwritten signature in black ink, appearing to read "John R. Ferris", written over a light blue circular stamp or watermark.

John R Ferris

CASSAR 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 – 2021 Annual Report**

Most of the CASSAR Chapters provide the Eagle Scout Recognition Certificate to individuals that contact them and request it. If you scroll through the various chapter reports you will see the numbers of certificates that are issued each year.

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

Michael C. McPhie

Orange County Chapter

### **2020 Participants**

#### **Chapters**

Orange County  
Sons of Liberty  
South Coast

**2020 - Marian L. Brown Award** - Awarded to CASSAR by National as a result of our Eagle Scout Nominee, Michael McPhie was selected as the 1<sup>st</sup> place winner in the National Competition. Michael McPhie will receive \$10,000.00.

I attended at participated in all the NSSAR Eagle Scout Committee meetings in 2020.

### **Robert E. Burt Scout Volunteer Award**

Nominations may be submitted year-round, so I can take applications any time from chapters. California is allowed up to 4 Robert E. Burt awards each year, so we need to remind the chapters (probably the chapter presidents) to look for potential recipients within their chapters. Once I receive the completed package from the chapters (with all documentation), I then get sent to the National Eagle Scout Committee and it is voted on the next time they meet, usually the Fall or Spring Leadership meetings Recent nominations and presentations include:

<b>Year</b>	<b>Compatriot</b>	<b>Chapter</b>
2020	William S. Crewe	Central Coast
2020	Hans F. Hunt	Orange County

Please send me any updated contact information for those individuals responsible for the Eagle Scout programs.

Those that I have interacted with at the Local Chapters have all been active and enthusiastic with assisting Eagle Scouts, their parents, and their Scout leaders. I hope to hear from all Chapters in the future. Thank you for all that you are doing to promote this Eagle Scout Scholarship. If you have any questions please send me an email or give me a call,

William E. Nay "Bill"  
CASSAR Chair, Eagle Scout Committee  
1040 Rancho Lindo Drive  
Petaluma, CA 94952

## **Handbook Committee**

Date of Report: March 23, 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 SAR Speakers Bureau *(Updated 11/21/20)*

Past President Derek Brown is working on assembling the CASSAR officer manuals to be updated and placed on the website. Please work with him to get all the manuals located and updated.

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

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

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 Brandon Villardi.

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 reports from only a few Chapter Color Guard Commanders, indicating that the chapter color guards have only been able to participate in Local, State or National events where social distancing and masks were allowed.

The following Chapters are awarded the "Best Color Guards" in their respective categories:

Small	No Entries
Med Small	Coachella Valley
Medium	Harbor Chapter
Large	Riverside
Very Large	Orange County

The Color Guardsman of the Year is Duncan Campbell of the San Diego Chapter with the most events attended by an individual Compatriot Color Guardsman.

Respectfully Submitted,

*Mark W. Kramer CASSAR Color Guard Commander*

**CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION**  
**COMMITTEE REPORT**  
**04/02/2021**  
**DAR LIAISON COMMITTEE**

The SAR - Daughters of the American Revolution (DAR) Award 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 DAR Finder Form is available on the CASSAR website.

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.

The CASSAR annually awards 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. The CASSAR also annually awards a Certificate of Appreciation and cash prize of \$100.00 to the California Society DAR Chapter that provides the highest number of referrals greater than five, that result in approved SAR member applications submitted using the DAR Finder Form.

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 submitted 33 Finder Forms and placed 5<sup>th</sup> nationally. The Bakersfield Chapter DAR was the winner of the \$100 cash prize and Certificate of Appreciation for 15 referrals. Plans are in the works for the CASSAR President to present the Check and Certificate to the Bakersfield Chapter DAR at their May meeting in celebration of their 100<sup>th</sup> Anniversary.

Since last year's virtual CASSAR April meeting, I have attended the virtual DAR Continental Congress in June 2020, the virtual CASDAR Conference in March 2021 and the virtual NSSAR DAR Liaison Committee held on September 25, 2020.

Respectfully Submitted,

Brian Stephens, CASSAR DAR Liaison

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

## **Information Technology Chairman Report Spring 2021**

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

**A reminder as first reported in the fall: 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 2020 we served 30,710 pages to 8,330 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.

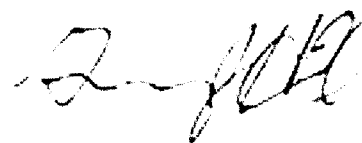
We continue to host the California Compatriot. The current Winter 2021 edition has been downloaded over 400 times. Issues dating as far back as 2007 are available for download.

Page	Pageviews
1. Home	6,076
2. Chapter Locator	4,095
3. Officers and Webinars	1,948
4. Compatriot	1,429
5. Meeting Archive	1,182

The Ladies Auxiliary has notified me that they will be moving their content to their own website so we will no longer be hosting it once they complete that. We will instead link to their page and have no direct responsibility for it.

The Color Guard has informed me that they would like to work with me to get more events posted to the website so members can stay better informed about opportunities to attend.

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

**CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION**  
**COMMITTEE REPORT**  
**03/01/2020**  
**FLAG COMMITTEE**

The William R. Furlong Memorial Award is presented annually at the SAR Congress to the state societies that have fulfilled the qualifications during the previous year. To qualify each state society and at least 50% of its chapters must present at least on NSSAR Flag Certificate to a person or organization who qualifies during the previous year. The deadline for the California Society to meet the minimum requirements necessary to receive the Furlong Award at next years National Congress in Richmond, Virginia is April 15<sup>th</sup>, 2020. This year there is a new award certificate for U.S. Flag Retirement.

<b>Chapter</b>	<b>Flag Display Certificate</b>	<b>Flag Retirement Certificate</b>
CASSAR	1	
<b>North</b>		
Delta		
Gen. George Washington		1
Gold Country	2	
Monterey Bay		
Mother Load		
Redwood Empire	35	
Sacramento	5	
San Francisco		
Silicon Valley		
Thomas Jefferson	3	
Yosemite		
<b>South</b>		
Central Coast	5	
Coachella Valley	1	
Eagle	1	
Gen. George Patton		1
Harbor	50	
Kern County	1	
Orange County	4	
Redlands	1	
Riverside	3	
San Diego	1	
Santa Barbara	0	
Sons of Liberty	0	
South Coast	0	
<b>Total Number of Chapters</b>	13	2

Respectfully Submitted,

Craig Anderson and Brian Stephens, Co-Chairman  
CASSAR Flag Committee

# ***Section Three***

## ***Chapter Reports***

### ***Reports:***

***Coachella Valley Chapter***  
***Delta Chapter***  
***Eagle Chapter***  
***General George Patton Chapter***  
***Gold Country Chapter***  
***Harbor Chapter***  
***Kern Chapter***  
***Monterey Bay Chapter***  
***Mother Lode Chapter***  
***Redlands Chapter***  
***Redwood Empire Chapter***  
***Riverside Chapter***  
***Sacramento Chapter***  
***San Diego Chapter***  
***San Francisco Chapter***  
***Silicon Valley Chapter***  
***Sons of Liberty-LA Chapter***  
***South Coast Chapter***  
***Thomas Jefferson Chapter***  
***Yosemite Chapter***



## **COACHELLA CHAPTER**

### **Chapter #36**

January 31, 2020 to March 9, 2021

Reporting Date: March 9, 2021

Submitted by: Chapter President Christopher Cerillo

Prepared by: Chapter Secretary Williams Haines

#### **Reporting officers:**

President Christopher J. Cerillo

Treasurer David L. Grinnell

Secretary William M. Haines

#### **Chapter Board:**

##### **Elected Officers:**

President Christopher J. Cerillo

1<sup>st</sup> Vice President Benjamin Hobbins

2<sup>nd</sup> Vice President Gary Burton

Historian Curtis J. Lane

Chaplain Leonard E. Lyon

Registrar Curtis J. Lane

Secretary William M. Haines

Treasurer David L. Grinnell

##### **Appointed Officers:**

Youth Programs Aaron Wilkerson

Knights Essay Curtis J. Lane

Veterans Affairs Benjamin Hobbins

JROTC/ROTC Chair Christopher J. Cerillo

Color Guard Commander Christopher J. Cerillo

#### **Chapter Summary:**

There were two Chapter Meetings held for 2020. COVID-19 Regulations prevented any in-person meeting after March 17, 2020. No Zoom meetings were held. Our Chapter participated in February for the Annual joint meeting of the DAR/SAR where the Martha Washington Medal was awarded to DAR member Joanne Hardy for Her assistance in getting the Chapter publicity in The Desert Sun. Membership applications and Supplemental applications have been entered into the PRS System under the direction of CASSAR Genealogist Terry Briggs. In December of 2020 the Chapter in conjunction with the DAR participated in "Wreaths Across America". The Chapter donated 160 Wreaths out of 700. Officers attended Spring and Fall State meetings via Zoom. The Chapter also attended the Annual Massing of the Colors at Forest Lawn Hollywood Hills in February to Celebrate George Washington's Birthday.

**Membership Summary:**

Number of members as of December 31, 2020:	34
Number of members as of January 1, 2021:	34
New members in 2020:	7
Number of drops in 2020:	8

**Dues in 2020:**

Dues to CASSAR:	\$ 800.00
Dues to NSSAR:	\$ 1,190.00
Dues Collected:	\$ 580.00

**Financial Information**

Bank signatory's:

President: Christopher J. Cerillo

Treasurer David Grinnell

Wells Fargo Bank

1753 N. Sunrise Way

Palm Springs, CA 92262

Balance in account as of January 31, 2021; \$6,518.78.00

Acct. Number: XXXXXX-10000

Treasurer: David Grinnell  
3501 Desert Creek Trail  
Palm Springs, CA 92262-9754  
(760) 322 - 1702  
dvytca@gmail.com

A third page may be necessary for reporting the chapters assets. Report only those items that are owned by the chapter and are over \$100 in value. List donated items over \$100.

**Chapter Assets**

**DELTA CHAPTER**  
**Chapter #29**  
**January 1, 2020 to December 31, 2020**

Reporting Date: March 2, 2021  
Submitted and Prepared by President Mel Howell  
Reporting officers:  
President Mel Howell  
Treasure Charles Newcomb

**Chapter Board:**

President Melvin S Howell  
Registrar Eddy Smith  
Treasurer Charles Newcomb

**Appointed Officers:**

Knights Essay Jeffery Sylvan  
JROTC/ROTC Gary Overby

**Delta Chapter Summary**

The Chapter started 2020 with excellent speakers in January and February and when the COVID – 9 Pandemic hit the Chapter ceased holding meetings. Outside venues were pursued but that did not work out because of restriction in the city parks that were looked into. Hopefully with vaccine shots being more available we may be able to have Chapter meetings inside again.

**Membership Summary:**

Number of members as of December 31, 2020:	24
Number of members as of January 1, 2020:	30 + 1 dual
Number of members as of January 1, 2021:	33
New members in 2020:	11
Number of drops in 2020:	7

**Dues in 2020:**

Dues to CASSAR:	\$ 600
Dues to NSSAR:	\$ 995
Dues Collected:	\$2,905

Financial Information

**Bank Signatory:**

Treasure: Charles Newcomb  
Bank of the West  
South Plaza Circle  
Patterson, Ca. 95361

Balance in account as of December 31, 2020: \$10,010.01

Treasure: Charles Newcomb  
253 Bellflower Court  
Patterson, Ca. 95363  
760-803-3435  
[Chas.newcomb@gmail.com](mailto:Chas.newcomb@gmail.com)

**Delta Chapter #29 ASSETS**

Four Flags: American, Flag of New England, California Bear, and SAR.  
Four poles and stands.  
Gavel  
Delta Chapter Poster  
Framed Delta Chapter Charter  
Portable Lectern  
Foldable dolly  
One large plastic tote

All above items are in the position of Melvin Howell. Stored in a locked metal shed at 3141 Cori Court Turlock, Ca. 95382.

Three JROTC Medals in position of Gary Overby 2911 San Rocco Court – Tracy, Ca. 95376.

## **EAGLE CHAPTER**

January 1, 2020 to December 31, 2020

Reporting Date: April 1, 2021

Submitted by: Chapter President Steven Wright

Prepared by: Chapter Secretary Karl Blackmun

Reporting officers:

President Steven Wright

Treasurer Robert Martin

Secretary Karl Blackmun

### **Chapter Board:**

#### **Elected Officers:**

President Steven Wright

1<sup>st</sup> Vice President Wayne Rogers

2<sup>nd</sup> Vice President

Treasurer Robert Martin

Chaplain Wayne Rogers

Registrar Bruce Plummer

Secretary Karl Blackmun

#### **Appointed Officers:**

Youth Programs Chair

Knights Essay John Murphy

Veterans Affairs

JROTC/ROTC Chair Wayne Rogers

Color Guard Commander Jerry Sayre

### **Eagle Chapter Summary:**

Due to COVID-19, this chapter held one meeting in January and had no other meetings during the remainder of the year.

#### **Membership Summary:**

Number of members as of December 31, 2020: 20

Number of members as of January 1, 2020: 17

Number of members as of January 1, 2021: **18**

New members in 2020: 3

Number of drops in 2020: 5

#### **Dues in 2021:**

Dues to CASSAR: \$

Dues to NSSAR: \$

Dues Collected: \$ 1,340

## **Financial Information**

Bank signatory: Robert Martin  
President: Steven Wright  
1<sup>st</sup> Vice President: Wayne Rogers  
Treasurer: Robert Martin

Chase Bank  
1800 East Florida Avenue  
Hemet, CA 92544

Balance in account as of December 31, 2019; \_\_\_\_\_

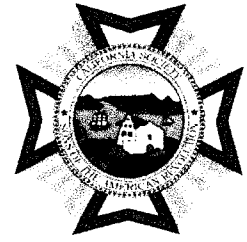
Acct. Number: 000000159816716

Treasurer: Robert Martin  
26031 Alice Lane  
Hemet, CA 92544  
(951) 929-2403  
Martin1hog13@mail.com



*The California Society  
of the*

*Sons of the American Revolution*



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

For 1 January 2020 to 31 December 2020

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

Prepared: 16 March 2021

Submitted by: Thomas Shaw, Chapter President

Prepared by: Robert Taylor, Chapter Secretary

Reporting Officers:

Robert Taylor, Chapter Secretary

**Chapter Board:**

**Elected Officers:**

President: Thomas W. Shaw

Vice President: Vacant

Secretary: Robert L. Taylor

Treasurer: Patryke Kim Thomas

Registrar: Jared J. Nathan

Chaplain: William D. Bays

Historian: Vacant

**Appointed Officers:**

Color Guard Commander: Robert Taylor

Flag Certificate Program: Vacant

Webmaster: Dr. Alan Buckley

Knight Essay Contest: Louis Kreuzer

Spirit of America Program: Robert Taylor

Junior ROTC Program: Robert Colbern

Eagle Scout Program: William Hurley

Historian: Vacant

SAR/DAR Liaison: Barbara LaMarche

Navy Sea Cadet Program: Robert Taylor

Valley Forge Program: Robert Taylor

Law Enforcement Liaison: William Hurley

Veterans Liaison: Frederick Dunn

Media Liaison: Robert Taylor

Awards: Robert Taylor

Photographer: William Hurley

Genealogist: Jared Nathan

**General Patton Chapter Summary:**

For the year 2020, the General Patton Chapter saw a decline in membership, starting the year with a membership of 94 compatriots, having a total membership of 104 on 31 December, but dropping to 81 compatriots on 1 January 2021 after factoring in 10 new accessions, 20 drops, 1 death, and 2 transfers out. The Chapter met in January, February and November for a luncheon on the second Friday of the month at the Poinsettia Pavilion in Ventura. Due to the COVID-19 Pandemic and banning of public meetings, Zoom virtual meetings were conducted for the months of May through July, October and December. No meetings were conducted in March and April, and again in August and September due to difficulties in setting up the Zoom link. Attendance

varied from a high of 14 to a low of 7, with the average being 11, or 10.6% of the total membership, including those living outside the local area. Guests varied from 2 to 6, with VPG Western District Jim Fosdyck, accompanied by his wife Uh Hui, installing the officers in January. On a more somber note, the chapter lost one member, Mark Collins III passing away 19 February.

The Chapter Color Guard was active at the start of the year, being present at the Massing of the Colors and the Spring NSSAR Leadership Meeting. Further activities were curtailed due to the pandemic. The Chapter did not present Spirit of America awards in June due to the pandemic shutting schools down, nor were Eagle Scout or JROTC/ROTC awards presented.

The Chapter Secretary, Robert Taylor, CASSAR President, passed the mantle to Don Littlefield at the CASSAR virtual Annual meeting in April. Chapter members attended both the virtual annual and the Fall meetings. Members of the Chapter were preparing for the 130<sup>th</sup> NSSAR Congress in Richmond, VA, but the event was cancelled. The Secretary attended the NSSAR Spring Leadership meeting in Louisville and the virtual Fall Leadership meeting. 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.

#### **Membership Summary:**

Number of members as of December 31, 2020:	104
Number of members as of January 1, 2020:	94
Number of members as of January 1, 2021:	81
New members in 2020:	10
Number of drops in 2020:	23

#### **Dues in 2020:**

Dues to CASSAR:	\$ 1,060.00
Dues to NSSAR:	\$ 1,880.00
Dues Collected:	\$ 2,940.00

#### **Financial Information**

Bank signatories: President Thomas W. Shaw & Treasurer Patryke Kim Thomas

Bank of America

1130 S. Victoria St.

Ventura, CA 93003

Balance in account as of December 31, 2020: \$ 7,234.14

Acct. Number: XXXXXXXX-2419

Treasurer: Patryke Kim Thomas  
1278 Carmel Dr.  
Simi Valley, CA 93065-4118  
(702) 325-4523  
[kimtmik@hotmail.com](mailto:kimtmik@hotmail.com)



**Chapter Assets**

<b><u>Item</u></b>	<b><u>Qty</u></b>	<b><u>Remarks</u></b>	<b><u>Custody</u></b>
Flag U.S.	1	3x5 with pole/stand. Donated	Robert Taylor
Flag Betsy Ross	1	3x5 with pole/stand. Donated	Robert Taylor
Flag CA	1	3x5 with pole/stand. Donated	Robert Taylor
Flag SAR	1	3x5 with pole/stand/streamers. Donated	Robert Taylor
Medals	Assorted	Purchased by Chapter or donated.	Robert Taylor
Certificates	Assorted	Purchased by Chapter or donated.	Robert Taylor
Lectern	1	Donated	Martin Spann
Treasurer	Box	Accumulated Records	Robert Taylor
Gavel	1	Donated	Tom Shaw
Charter & Appl	1 each	Received from NSSAR	Robert Taylor
Epsom Projector & Screen		Donated	Robert Taylor

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

## **Annual Report**

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

**Chapter: Gold Country Chapter**

**Reporting Period: 2020**

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**Number of Meetings held in 2020:** 9 total - 3 in person and 6 via Zoom.

**List SAR programs in which chapter participated in 2020:** Elementary School Poster, Middle School Brochure Contest

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

CASSAR State meetings in April and Nov. via Zoom

Fund Raising for Wreaths Across America

**List color guard events in which chapter participated in 2019:**

Presented Elementary School Poster Presentations to 7 schools and 27 classrooms.

**Chapter Highlights:**

Ron Barker is the Chapter President

Dave Gilliard is the CASSAR Elementary School Poster Contest Chairman and Media and Public Relations.

Greg Hill is the CASSAR Web Master and IT Manager

**Award presentations:**

ROTC Medal and Certificate, Whitney High School Rocklin and

Cadet Petty Officer Samantha Donovan of Yuba City High School.

Presented over \$3,000 to student winners of the Elementary School Poster Contest

Certificates of Appreciation to Chapter Speakers

**Principal Chapter Officers for year 2020:**

**President:** Ron Barker

**Secretary:** Ron Barker

**Treasurer:** David Gilliard

**Registrar:** Tony Chakurian

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

## **Annual Report**

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

### **Summary Membership Report:**

**Members\* on 1/1/2020: 61**

**Plus Additions: 5**

**Less Subtractions: 5**

**Members\* on 1/1/2020: 61**

### **Summary Financial Report:**

**First Foundation Bank**

**649 Lincoln Way**

**Auburn, CA 95603**

**Acct# 315001075**

**Balance on 12/31/2019: \$12,120**

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

### **Gold Country Chapter Asset Inventory:**

**13 uniforms**

**25 Historic Flags and Stands**

**Respectfully Submitted,**

*David A Gilliard*

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**David Gilliard, President 2021**

**March 18, 2021**

## **Harbor Chapter Chapter #22**

January 1, 2020 to December 31, 2020

Reporting Date: January 15, 2021

Submitted by: Chapter President Brandon Villardi

Prepared by: Chapter Secretary Jack Mulkey &  
Chapter President Brandon Villardi

Reporting officers:

President Brandon Villardi

Treasurer Jim Olds

Secretary Jack Mulkey

### **Chapter Board:**

#### **Elected Officers:**

President – Brandon Villardi  
1st VP – Dr. James Bunker  
2nd VP – Dr. John Richardson  
3rd VP – PE Jim Olds  
Chaplain – Father Peter Mallin  
Director – PE Kevin Bidenkap  
Secretary – Jack Mulkey  
Treasurer – PE Jim Olds  
Registrar – Dr. Kent Gregory  
Historian – PE James Gill  
Genealogist – Dr. John Richardson

#### **Appointed Officers:**

Youth Programs Chair	James Gill
JROTC/ROTC Chair	James Gill
Eagle Scout Chair	Jim Olds
Color Guard Commander	Brian Merrell
Poster Contest	Brandon Villardi

### **Harbor Chapter Summary:**

Due to Covid-19 restrictions implemented in March of 2020, The Harbor Chapter continued to hold its Monthly meetings via Zoom. Although the meetings were being held via Zoom, The Harbor Chapter continued to average approximately 26% attendance at our Monthly meetings.

Most of the parades and events were canceled; however, our Color Guard did manage to participate in the annual Massing of the Colors, multiple Independence Day Celebrations, Veterans Day and Wreaths Across America. Several members also had the privilege in attending the first National Colorguard event presented via Zoom "The Battle of Trenton" hosted by the New Jersey Society.

Unfortunately, our Youth Program activity declined in 2020. As a chapter we presented only 4 JROTC good citizen medals. We also had entries for the both the Poster Contest and Knight Essay Contest.

**Membership Summary:**

Number of members as of December 31, 2020:	68
Number of members as of January 1, 2020:	65
Number of members as of January 1, 2021:	57
New members in 2020:	10
Number of drops in 2020:	11

**Dues in 2020:**

Dues to CASSAR:	\$ 760.00
Dues to NSSAR:	\$1,360.00
Dues Collected:	\$2,120.00

**Financial Information**

Bank Signatories

President: Brandon Villardi

Secretary: Jack Mulkey

Treasurer: Jim Olds

One West Bank

2300 Pacific Coast Hwy

Lomita, CA 90717

Acct. Number: ████████8004

Treasurer: Jim Olds  
5002 Paseo Del Pavon  
Torrance, Ca 90505-9254  
(310)489-0462  
JOlds@portla.org

## **Kern Chapter**

### **Chapter # 38**

January 1, 2020 to December 31, 2020

Reporting date: February 16, 2021

Submitted by: Chapter President Michael A. Davis

Prepared by: Chapter President Michael A. Davis

Reporting Officers:

President Michael A. Davis

Secretary Jeffrey Shepherd

Treasurer/Registrar Kerry Adams

#### **Chapter Board:**

##### **Elected Officers:**

President Michael Davis

Chaplin Phil Dodson

Vice President Trenton Spears

Secretary Jeffrey Shepherd

Treasurer/ Registrar Kerry Adams

##### **Appointed Officers:**

School Liaison Arnold Burr

ROTC Chair Florn Core

Color Guard Commander Brian Claxton

Youth Programs Chair Trenton Spears

**Kern Chapter Summary:** Despite a difficult corona-virus-restricted year, the Kern Chapter experienced a successful year as our membership grew, we attended new events and changed direction with our signature event: school assemblies. We awarded 3 Flag Display Certificates and participated in a Flag Retirement Ceremony together with members of the Scouts of America and members of the local chapter of the Veterans of Foreign Wars.

The new events were participation in Constitution Week together with the Bakersfield Chapter of DAR, Flag Day ceremony and a new Flagpole Erection Ceremony. We were able to conduct 9 meetings including a Zoom meeting.

Sadly, two of our members passed away this year: William Pendleton, #177021 and James Claxton, #159184.

**Membership Summary:**

Number of members as of December 31, 2020:	68
Number of members as of January 1, 2020:	59
Number of members as of January 1, 2021:	69
New members in 2020:	15
Number of drops in 2020:	5

**Dues in 2020:**

Dues to CASSAR:	\$1160.00
Dues to NSSAR:	\$2030.00
Dues collected:	\$4709.00

**Financial information:**

Bank signatory:

Treasurer Kerry Adams

Mechanics Bank

3800 Riverlakes Drive

Bakersfield, CA 93312-6662

Acct.#XXXX-8564

Balance in account as of December 31, 2020:

Treasurer: Kerry Adams

14726 Redwood Valley Drive

Bakersfield, Ca 93314-5225

**Kern Chapter #68 Assets: \$10,005.00**

Cash: \$3815.70

Various flags and props used in our school assembly program

DVD player, projector, small tripod, all used for meetings

Chapter Medals inventory

Other than cash, none of the flags, props, medals or meeting equipment exceeds the \$100.00 individual value.



# The California Society of the Sons of the American Revolution

## **Monterey Bay Chapter Annual Report** *For January 1, 2020 to December 31, 2020*

**Chapter:** Monterey Bay (17)

**Reporting Period:** January 1, 2020 to December 31, 2020

**Number of Meetings held:** 1

Due to the COVID-19 shutdown no other meetings were held in 2020.

**List SAR programs in which chapter participated during reporting year:**

ROTC/JROTC Awards

**List events in which chapter participated during reporting year:**

Wreaths Across America

**List color guard events in which chapter participated during reporting year:**

None

**Award presentations during reporting year:**

5 JROTC Certificates and Medals: Seaside High, Soledad High, Monterey High, Marina High, and Everett Alvarez High.

Two Flag Certificates were presented.

Bob Stephan received the SAR Patriot Medal

**Principal Chapter Officers during reporting year:**

President: Jack Franke

Vice President: Vacant

Secretary: Bob Stephan, Acting

Treasurer: Peter Tansill

**Summary Membership Report:**

**Members\* on 1/1/2019:** 26

**Plus Additions:** 0

**Less Subtractions:** 1

**Members\* on 1/1/2020:** 25

\*Do not include associate or dual members

**List all chapter assets (who had custody of asset during reporting year), and approx. value, if over \$100:**

Checking Acct, Monterey County Bank #004001230 (signers: Treasurer Peter Tansill, President Jack Franke.)

US Flag and Stand (Peter Tansill)

SAR Flag and Stand (Peter Tansill)

SAR Medals and Certificates (Acting Secretary Bob Stephan)

Library of books and videos (Bob Stephan)

Parade Flag Sling (Bob Stephan)

Respectfully Submitted,

/s/ Robert A. Stephan

Robert A. Stephan, Acting Secretary

Date 3/31/2021

**Mother Lode Chapter  
Chapter #48  
January 1, 2020 to December 31, 2020**

Reporting Date: March 1, 2020

Submitted by: Chapter President Michael Muetz

Prepared by: Chapter Secretary Tom Douglas

Reporting officers:

President: Michael Muetz

Treasurer: Robert Conover

Secretary: Tom Douglas

Youth Activities: Kevin Tierney

**Chapter Board:**

**Elected Officers:**

President: Michael Muetz

Vice President: Sam Bradley

Treasurer: Bob Conover

Secretary: Tom Douglas

Chancellor: Douglas Drake

Historian: John Krahn

**Appointed Officers:**

Youth Activities Director: Kevin Tierney

Color Guard Commander: Russ Kaiser

Newsletter Editor: Tom Adams

**Mother Lode Chapter Summary:**

The Chapter began 2020 with its regular meetings at the Denny's Restaurant in Cameron Park in January and February. March 2020 arrived and we were unable to have in person meetings due to the Covid pandemic. We held our first zoom meeting on November 24, 2020 and plan to continue holding zoom meetings until we can participate with in-person meetings. We were unable to hold our yearly Community Awards banquet due to the pandemic.

**Youth:**

The Mother Lode Chapter had a total of six entries in the brochure contest from two schools. It was a down year as a result of the Covid Pandemic causing many schools to move to remote learning and / or modifies schedules.

Efforts were made to recruit poster participation; however we were unsuccessful, again due in large part to the Covid pandemic.

**Color Guard:**

The Sacramento Chapter Color Guard has graciously invited our small color guard to participate in events with them. 2019 was a very busy year for the chapter color guard and we looked forward to another great year in 2020, but due to the pandemic those types of activities the color guard would participate in were cancelled.

## Membership Summary:

Number of members as of December 31, 2020	27
Number of members as of January 1, 2020	23
Number of members as of January 1, 2021	26
New members in 2020	1 (Jr.)
Reinstatements in 2020	3
Number of drops in 2020	1

## Dues in 2020:

Dues to CASSAR	\$ 380.00
Dues to NSSAR	\$ 670.00
Dues Collected	\$1,045.00

## Financial Information:

### Bank Signatory's:

President: Michael Muetz  
Vice President: William S. Bradley  
Treasurer: Robert T. Conover  
Secretary: Thomas A. Douglas

Umpqua Bank  
4011 Goldorado  
Cameron Park, CA 95682  
Account number XXXXXX0580  
Balance in account as of December 31, 2020: \$3,982.70

Treasurer: Robert T. Conover  
2837 Osborne Road  
Cameron Park, CA 95682  
(530) 409-8828  
[bobtrap@comcast.net](mailto:bobtrap@comcast.net)

## Chapter Assets

US Flag and Stand (Mike Muetz)  
SAR Flag and Stand (Mike Muetz)  
Medals and Awards Inventory (Tom Douglas)

## **Redlands CHAPTER**

### **Chapter #35**

January 1, 2020 to December 31, 2020

Reporting Date: January 15, 2021

Submitted by: Chapter President Shawn Price

Prepared by: Chapter Secretary Charlie Frye

#### **Reporting officers:**

President Shawn Price

Treasurer Patrick Lyons

Secretary Charlie Frye

#### **Chapter Board:**

##### **Elected Officers:**

President Shawn Price

1<sup>st</sup> Vice President Don Boatright

2<sup>nd</sup> Vice President Brian Christie

Treasurer Patrick Lyons

Registrar David Palmer

Secretary Charlie Frye

##### **Appointed Officers:**

Youth Programs Chair Charles Kiel

Color Guard Commander John Flippin

Historian Charlie Frye/Shawn Price

Genealogist: Shawn Price

JROTC/ROTC Chair Al Rivers

Sergeant at Arms Charlie Frye

Chaplain Bill Buchanan

Asst. Genealogist: Bobby Pierson

#### **Redlands Chapter Summary:**

The past year the Redlands Chapter endured two-month interruption to our regular chapter meetings at Denny's and then the transition to meeting on Zoom. The upside was deciding to meet for the three summer months, and so we were able to meet ten times, instead of the traditional nine. However, the COVID-19 pandemic did curtail other chapter activities; the only youth award we were able to make was the Knight Essay Contest in February.

Zoom meetings presented new opportunities, including inducting a one new member and one junior member in July – the feeling of breaking new ground was good for morale. Zoom meetings also provided opportunities to see CASSAR officers more frequently. While those may have been healthy for us as an SAR chapter, we deeply miss the opportunity to engage in the community with our color guard activities and youth programs and are hopeful 2021 may yet hold an in-person meeting for our chapter.

**Membership Summary:**

Number of members as of December 31, 2020:	33
Number of members as of January 1, 2020:	24
Number of members as of January 1, 2021:	33
New members in 2020:	1
Number of drops in 2020:	0

**Dues in 2020:**

Dues to CASSAR:	\$620.00
Dues to NSSAR:	\$395.00
Dues Collected:	\$1560.00

**Financial Information**

Bank signatory's:

President: Shawn Price

Secretary: Charlie Frye

Treasurer: Patrick Lyons

Provident Bank

125 E Citrus

Redlands, CA 92373

(909) 793-2992

Balance in operating account as of December 31, 2020: \$1589.00

Balance in John Ford Memorial Fund account as of December 31, 2020: \$2306.59

Operating Acct. Number: XXXXXX-8749

Ford Fund Acct. Number: XXXXXX-2303

Treasurer: Patrick Lyons  
7426 Cherry Avenue, Suite 210-303  
Fontana, CA 92336  
(858) 397-4074  
[patricklyons49@gmail.com](mailto:patricklyons49@gmail.com)

**Redlands Chapter Assets**

1 Trailer for Color Guard (Purchased for \$1350) and depreciated value is \$410.00. Last 5 of VIN are 50441 and has CA plates 4MY9624.

All other Redlands Chapter color guard assets (flags, uniforms, muskets, tents, etc.) have fully depreciated.

CASSAR Property kept by the Redlands Chapter: 1 George Washington Marquee Tent

NSSAR Property kept by the Redlands Chapter: 6 Bearskin Dragoon Helmets (loaned to NSSAR by Paramount Studios)

## **REDWOOD EMPIRE CHAPTER**

### **Chapter #209**

January 1, 2020 to December 31, 2020

**Reporting Date: January 15, 2021**

Submitted by: Chapter President: William E. Nay

Prepared by: Chapter President: William E. Nay

Reporting officers:

President: William Edward Nay

Treasurer: Michael Edward Nay

Secretary: Stanley Laughlin

### **Chapter Board:**

#### **Elected Officers:**

President: William E. Nay

1<sup>st</sup> Vice President: Jan Van de Wetering

Historian: James S. Beatty

Chaplain: William P. Beatty

Registrar: Harry M. Stover, Jr.

Secretary: Stanley Laughlin

Treasurer: Michael E. Nay

#### **Appointed Officers:**

Youth Programs Chair: William Bullard

Eagle Scout Chair: Duncan Flett

Brochure Contest Chair: Jonathan Mann

Sea Cadet Chair: Jonathan Mann

Color Guard Commander: Michael Nay

#### **Redwood Empire Chapter Summary:**

The past year The Redwood Empire Chapter saw growth with 9 new members, leaving our total membership at 57 for the coming year. Our chapter provided support as the Host Chapter for the CASSAR Board of Managers (BOM) meeting; however, due to COVID we had to cancel the venue and attend the meeting virtually. We recommended CASSAR recognition for Ron Collier for the Silver Good Citizenship Medal and the Emergency Medical Service Award to Jason Bond, and the staff at Emergency Medical Response, Napa County.

The youth programs we supported included the Sea Cadets and Scouts BSA. In addition to recognizing several Eagle Scouts, we hosted Merit Badge workshops for Law, American Heritage, and Genealogy. We partnered with the Scouts BSA Redwood Empire Council in a US Flag Retirement program. We awarded one Sea Cadet Medal.

**Membership Summary:**

Number of members as of December 31, 2020:	67
Number of members as of January 1, 2020:	57
Number of members as of January 1, 2021:	63
New members in 2020:	9
Number of drops in 2020:	2

**Dues in 2020:**

Dues to CASSAR:	\$ 1,040.00
Dues to NSSAR:	\$ 1,820.00
Dues Collected:	\$ 3,820.00

**Financial Information**

Bank signatory's:

President: William Nay

Treasurer: Michael Nay

Assistant Treasurer: Peter Goyhenetche

Wells Fargo Bank

Rohnert Park Main

5 Padre Parkway

Rohnert Park, CA 94928

Balance in account as of December 31, 2020; \$6,426.24

Acct. Number: XXXXXX-8251

Treasurer: Michael Nay  
1040 Rancho Lindo Drive  
Petaluma, CA 94952  
707 332 3226



## **Riverside, CA Chapter Chapter (#12)**

Reporting Period: January 1, 2020 to December 31, 2020

Date of Report: March 15, 2021

Submitted by: President C. Roger Cooper

Prepared by: Secretary Frederick Schuster

### **Reporting Officers 2021**

President: C. Roger cooper

Secretary: Fred Schuster

Treasurer: Michael Mann

### **List of Chapter Officers-2021**

President: C. Roger Cooper

2<sup>nd</sup> Vice President: Albert Kimble

Treasurer: Michael Mann

Historian: David Leonard

Chaplain: Wayne Rogers

1<sup>st</sup> Vice President: Hal Cardwell

Secretary: Fred Schuster

Registrar: Dean Chase

Color Guard Commander: Benny White

Genealogist: Henry Lucas

### **List of Appointed Board Positions-2021**

Chapter Historian: David Leonard

By-laws Chair: Brian Stephens

Color Guard Commander: Benny White

JROTC/ROTC Chair: Rob Dickey

Veterans Awards Chair: Benny White

New Letter Editor: Wayne Rogers

Awards & Medals Chairman: Mark Kramer

Chaplain: Wayne Rogers

Eagle Scout Chair: Michael Heckenlaible

Youth Programs: Fred Schuster

Valley Forge Chair: Henry Lucas

### **Riverside Chapter Presidents Summary**

The 2020 was a historic for the Riverside Chapter, Sons of the American Revolution in many ways, the chapter is now in its 76<sup>th</sup> continuous year as a chartered member of the National Society and has experienced many years of continual growth.

This past year the chapter held two in-person meetings at the Canyon Crest Country Club before the world-wide pandemic forced the closure of most of the businesses state-wide in California and the country. The chapter purchased a ZOOM license so it could host virtual meetings in August 2020 and has continued to host virtual meeting into 2021. Starting in December the chapter began a program to reach out to home bound members by hosting a weekly "Riverside Café" coffee hour every Monday morning at 9 AM, while not widely attended it has been successful with different members attending each week.

The 2021 monthly meetings have a 15-to-20-minute video which shows different events of the Revolutionary War at the end of the meeting to help spark interest in the virtual meetings which has proven to be an educational learning experience for all of our members.

### **Membership Summary-2020**

Number of Members as of January 1, 2020	117 (CASSAR Report)
Number of Members as of December 31, 2020:	129 (NSSAR Roster)
Number of Members as of January 1, 2021:	103 (CASSAR Roster)
Number of New Members-2020:	4 (CASSAR Roster)
Number of Dropped Members-2020:	15 (CASSAR Roster)
Transfer out	3
Deceased	1

Dues Payment for CASSAR 2021: \$1,440

Dues Payment for NSSAR 2021: \$2,450

Total Dues Paid 2020: \$3,990

### **Riverside Chapter Financial Report-2020**

Riverside SAR

Providence Bank

5225 Canyon Crest Drive

Riverside, CA 92507

(951) 781-8080

Balance as of 12/31/2020 in account XXX5841 \$27,563.20

After CASSAR dues were paid.

Account signers:

President, 1<sup>st</sup> Vice President and Treasurer:

Treasurer and Financial Officer of Record:

Treasurer: Michael Mann

Address: 2645 Orange Vale Drive

Riverside, CA 92503,

Phone: (951) 689-2105

Email : [mikeronie@earthlink.net](mailto:mikeronie@earthlink.net)

### **Assets**

CASSAR Flag on staff with streamers

USA Flag on staff with streamers

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

**Number of Meetings held in 2020:** 12 (3 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

**Principal Chapter Officers for year 2020:**

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

**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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**Summary Membership Report:**

- Members\* on 1/1/2020: 177
- Plus Additions: 17
- Less Subtractions: 12
- Members\* on 1/1/2021: 182

**Summary Financial Report: Golden 1 Credit Union, P.O. Box 15966 Sacramento, CA 95852-0966.**

**Authorized Signers: Don Littlefield, Jim Faulkinbury, Craig Anderson.**

- Savings \$1.00
- Money Market \$ 48,696.58
- Checking \$6841.57
- Total \$55,539.15

**List all chapter assets (who has custody of asset), and approx. value, if over \$100, as of 12/31/2020:**

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 Carl Ahlberg  
    Yamaha EMX 512sc amplifier  
    2 Community DnD12 speakers  
    2 speaker stands  
    Five Wireless Transmitter lavalier mic's  
    5 Audio-Technica ATW 3100 UHF Wireless Receivers  
    1 Audio-Technica P615 Cardoid Dynamic Vocal Microphone  
    Misc speaker cables  
    Gator Power Rack for Wireless Receivers  
Stage Prop Brown Bess Musket and bayonet (Carl Ahlberg)  
Stage Prop Denix Brown Bess Musket and bayonet (Russ Kaiser)  
Parade Banners (Russ Kaiser)  
A-Frame meeting sign SAR Sacramento (Don Littlefield)  
Ships brass bell for "End of Watch" memorial ceremonies (Don Littlefield)  
Two shiny gold weighted flag stands in a suitcase (Don Littlefield)  
6 waffle boards: Declaration of Independence, and  
    Bill of Rights, and 4-page US Constitution (Don Littlefield)  
1 – SAR portable retractable Minute Man banner (Craig Anderson)

**Respectfully Submitted,**

**Delwin Wade Hanson, President**

# **San Diego Chapter Chapter**

January 1, 2020 to December 31, 2020

*Reporting Date:* March 5, 2021

*Submitted by:* 2020 Chapter President, William Peters

*Prepared by:* Chapter Secretary Robert Hayden

*Reporting officers:*

*President:* William Peters

*Treasurer:* Frederick Hall

*Secretary:* Robert Hayden

## **Chapter Board:**

### **Elected Officers:**

*President:* William Peters

*1<sup>st</sup> Vice President:* Edward Torrence

*2<sup>nd</sup> Vice President:* Michael Hirman

*Membership:* William Weedman

*Treasurer:* Frederick Hall

*Chaplain:* Rev. Dr. Stan DeLong

*Registrar:* Ray Raser

*Secretary:* Robert Hayden

*Sergeant-at-Arms:* Vacant

*Color Guard Commander:* Duncan Campbell

### **Appointed Officers:**

*Chancellor:* George Brewster

*Communications Director:* Barry Key

*Webmaster:* Barry Key

## **San Diego Chapter Summary:**

The year 2020 was the year of a pandemic – The Coronavirus. It was not only difficult but dangerous to gather in groups for any activity. Most of our participation was in outdoor activities by members of the Color Guard and members of the Board of Directors. Government mandates for personal safety and social distancing were followed at all times. This, of course, is not unique to the San Diego Chapter.

Two of our members passed away during 2020. Edward Torrence, First Vice-President, Robert Edwin Kronmeyer, Chapter Emeritus Member, and Morgan Dale Griggs, Chapter Member.

### **Chapter Events for 2019:**

- Board of Director Meetings – Nine (9), all but January 16 were virtual meetings via “Go to Meeting.”
- Membership breakfast meetings – One (1), February 1 live, for Officer election and installation.

**Events in which chapter participated in 2020:**

- Firing Squad Training Feb /8-9/2020
- Joint Meeting with the Mayflower Society, February 15, 2020.
- Massing of the Colors, Forest Lawn, Hollywood February 16, 2020.
- 145<sup>th</sup> CASSAR Annual Meeting of Membership, April 18, 2020 – S.D. delegates participated in ZOOM meeting.
- Memorial Day Wreath and Color Guard, May 25, 2020, Singing Hills Memorial Park.
- Flag Certificate, Julian Chamber of Commerce, June 14, 2020.
- Wreaths Across America Dec 16 & 17, 2020

**Events in which chapter Color Guard participated in 2020:**

- Joint Meeting with the Mayflower Society, February 15, 2020.
- Massing of the Colors, Forest Lawn, Hollywood February 16, 2020.
- Memorial Day Wreath, Color Guard, and Firing Squad. May 25, 2020, Singing Hills Memorial Park.
- Flag Certificate, Julian Chamber of Commerce, June 14, 2020.
- Independence Day Ceremony – Green Dragon Tavern, Carlsbad July 4, 2020
- Massing of the Colors, October 2020

**Awards presentations:**

- Youth Poster Contest Program top 4 winners – 1<sup>st</sup>, 2<sup>nd</sup>, and two 3<sup>rd</sup> place local winners. 1<sup>st</sup> place winner won Honorable Mention in CASSAR level.
- Certificates of Appreciation Speakers, worthy Members, and volunteers.

**Membership Summary:**

<i>Number of members as of December 31, 2020:</i>	179
<i>Number of members as of January 1, 2020:</i>	165
<i>Number of members as of January 1, 2021:</i>	161
<i>New members in 2020:</i>	11
<i>Number of drops in 2020:</i>	16

**Dues in 2020:**

<i>Dues to CASSAR:</i>	\$2,342.00
<i>Dues to NSSAR:</i>	\$3,813.00
<i>Dues Collected:</i>	\$8,932.00

**Financial Information**

*Bank signatories:*

*President:* William F. Peters

*Treasurer:* Frederick Hall

Bank of America

P.O. Box 15284

Wilmington, DE 19850

*Balance in account as of December 31, 2020;* \$29,331.91

*Acct. Number:* xxxx-xxxx-2076

*Treasurer:* Frederick Hall  
2208-44 River Run Drive  
San Diego, CA 92108-5809  
fghall4sd@hotmail.com

**SAN FRANCISCO CHAPTER**  
January 1, 2020 to December 31, 2020

Reporting Date: April 2, 2021  
Submitted by: Chapter President Dan Ashley  
Prepared by: Chapter Secretary Luke Dziurzynski

**Chapter Board:**

**Elected Officers:**

President Dan Ashley	Chaplain Ben Sullivan
1 <sup>st</sup> Vice President Dr. Frank Helm	Registrar Jay Cunningham
2 <sup>nd</sup> Vice President Tony Bothwell Sr.	Secretary Luke Dziurzynski
Historian John Garvey	Treasurer Jordan Buckley
Genealogist Marston Watson	Chancellor Mike Phelps, Esq

**Appointed Officers:**

Awards Chairman Bob Ebert	Color Guard Bob Ebert
Newsletter Editor Tony Bothwell Sr.	Ambassador at Large Fred Bothwell

**San Francisco Chapter Summary:**

The past year the San Francisco Chapter had a 6.6% drop in membership, with 26 reinstated members and 30 members dropping from the roster for 2020; leaving our total membership at 61 members for the coming year.

Our chapter activities were greatly diminished this year, as our usual chapter meetings and local outreach were shut down due to the coronavirus pandemic. Our 2nd Vice President Tony Bothwell Sr. is to be commended for keeping our chapter updated and connected through the newsletter. By the end of the year, our chapter started hosting its chapter meetings over Zoom.

Notably, a Liberty Medal was presented to Compatriot Jay Cunningham for helping bring in 30 new members of the San Francisco SAR chapter during Jay's time as Registrar.

**Membership Summary:**

Number of members as of January 1, 2020:	65
Number of members as of January 1, 2021:	61
New members in 2020:	26
Number of drops in 2020:	30

**Dues in 2020:**

Dues to CASSAR:	\$ 760.00
Dues to NSSAR:	\$1,330.00
Dues Collected:	\$2,660.00

**Financial Information**

Balance in account as of March 11, 2021; \$11,204.22

Treasurer:

Jordan Buckley  
31 Estrella Way  
Novato, CA 94945  
(415) 793-0625  
[jordankbuckley@yahoo.com](mailto:jordankbuckley@yahoo.com)



**SONS OF THE AMERICAN REVOLUTION  
SILICON VALLEY CHAPTER  
Chapter #05**

January 1, 2020 to December 31, 2020

Reporting Date: March 31, 2021

Submitted by: Chapter President Richard Ferman

Prepared by: Chapter Secretary Ranney Thayer

Reporting officers:

President: Richard Ferman

Registrar: Terry Briggs

Secretary: Ranney Thayer

**Chapter Board:**

**Elected Officers:**

President: Richard Ferman

Vice President of Programs: Tim Heckman

Vice President of Membership: (vacant)

Historian: (vacant)

Treasurer: (vacant)

Chaplain Joseph Ferman

Registrar Terry Briggs

Secretary Ranney Thayer

**Appointed Officers:**

Youth Programs Chair: Tim Heckman

Knights Essay: Tim Heckman

Eagle Scout Chairman: Rob Morse

JROTC/ROTC Chair: (vacant)

Color Guard Commander: (vacant)

Sea Cadet Chairman: Michael Allen

**05 Chapter Summary:**

The past year the 05 Chapter remained dormant (no meetings) from March to December, due to the COVID 19 crisis. There were two in-person meetings, one in January and one in February 2020. Meetings resumed in January 2021 with a new format using ZOOM technology.

The 05 Chapter Color Guard participated in Four Chaplains Memorial held on February 1, 2020 at St. Francis Cabrini Church in San Jose. Six compatriots attended. There were no more Color Guard events for the rest of the year.

The youth programs had no entries in all categories of the CASSAR youth platforms except for the Knight Essay Contest, where two entries were received and one was chosen as the winner and was forwarded to the CASSAR for their competition.

The following medals were awarded in November and December 2020 to SVSAR Compatriot Michael Allen: SAR Bronze Good Citizenship Medal and the SAR Emergency Medical Services Medal.

**Membership Summary:**

Number of members as of December 31, 2020:	118
Number of members as of January 1, 2020:	110
Number of members as of January 1, 2021:	112
New members in 2020:	10
Number of drops in 2020:	6

**Dues in 2020:**

Dues to CASSAR:	\$ 1,480.00
Dues to NSSAR:	\$ 2,605.00
Dues Collected:	\$ 4,085.00

**Financial Information**

Bank signatory's:  
Registrar Terry Briggs

Chase Bank  
San Jose, CA

Balance in account as of December 31, 2020: \$21,698.50 general chapter funds + \$11,257.72 youth programs designated funds = \$32,956.22 total funds.

Acct. Number: XXXXX-1627

Registrar: Terry Briggs  
713 Hibiscus Place  
San Jose CA 95117  
(408) 984-1041  
tlbaia@comcast.net

**Sons of Liberty CASSAR**  
January 1, 2020-December 1, 2020

REPORTING DATE 03.25.21

Submitted By Sol President Troy R Munday

Reporting Officers:

President Troy R Munday

Treasurer Bryan Horsman

**CHAPTER BOARD 2020:**

President Tom Perkins

1<sup>st</sup> VP Troy R Munday

2<sup>nd</sup> VP David Smith

Secretary Troy R Munday

Treasurer Bryan Horsman

Registrar Mark Cross

Chancellor Don Jones

**TRUSTEES ON PERMANENT FUND:** John Kuzma, Mark Ladd, Tom Pelton

**APPOINTED OFFICERS:**

William Kruzykowski-Non JROTC Youth Programs for Awards and Scholarships

Richard Humphrey-Coordination and ordering of Awards, and Certificates

**SONS OF LIBERTY AWARDS PRESENTED 2020**

Rotc Bronze Medal And Certificate To 20 High Schools At Forest Lawn

Massing Of The Colors

Knight Essay SoL Chapter winner Medal and Certificate presented by

President Tom Perkins to Anaida Haroutiunian

SAR SoL Arthur M. & Berdena King Eagle Scout Award 2020 to Mr. Fox Me

**Sons of Liberty Member Awards:**

**Bronze Roger Sherman Medal:**

William Kruzykowski, Mark Cross, Troy R Munday, Bryan Horsman, Tom Pelton

**Meritorious Service Award**

John Kuzma, Mark Ladd, Richard Humphrey, Dr. David Smith

**Chapter Distinguished Service Award**

**2019** Mark Cross

**2020** Don Jones

**Past Presidents in Appreciation Gavel Plaque Award**

2013-2014 Mark Ladd

2015-2017 Dr. General David Smith

**25 Year Service Pin & Certificate:**

James McHargue

**Chapter President Gavel:**

Troy R Munday

**SoL Summary**

Due to COVID-19 Chapter meetings went virtual, various members presented. Election was held in November.

**CHAPTER BOARD 2021**

President Troy R Munday

1<sup>st</sup> VP Tom Perkins

2<sup>nd</sup> VP David Smith

Secretary David Morrow

Treasurer Bryan Horsman

Registrar Mark Cross

Chancellor Don Jones

**Meeting Dates set for 2021:**

**SONS OF LIBERTY MEMBERSHIP SUMMARY**

**FINANCIAL INFORMATION**

Bank signatory's:

President: Troy Munday

1<sup>st</sup> Vice President: Tom Perkins

Treasurer: Bryan Horsman

Investment Funds:

JP Morgan Chase Bank

PO Box 182051

Columbus, OH 43218-2051

Balance in account as of December 31, 2020: \$57,404.99

Acct. Number: XXXXXX-66263

General Funds:

JP Morgan Chase Bank

PO Box 182051

Columbus, OH 43218-2051

Balance in account as of December 31, 2020: \$17,046.69

Acct. Number: XXXXXX-06672

Treasurer: Bryan Horsman  
5120 Twilight Canyon Rd. Unit H  
Yorba Linda CA 92887  
(714) 454-4007  
[bryan.horsman@sons-of-liberty-sar.org](mailto:bryan.horsman@sons-of-liberty-sar.org)

**SONS OF LIBERTY ASSETS**

US Flag, SAR Flag, SAR Banner, Certificate Folders, Rosette Pins,

**SOUTH COAST CHAPTER**  
**Chapter #32**  
January 1, 2020 to December 31, 2020

South Coast Chapter  
Annual Report  
January 1, 2020 to December 31, 2021

Reporting Date: March 11, 2021  
Submitted by: Chapter President Robert Scott Whitman  
Prepared by: Chapter Secretary Jerry Hereford

**Reporting officers:**

President: Robert Scott Whitman  
Treasurer: Jeremy Paye  
Secretary: Jerry Hereford

**Chapter Board:**

**Elected Officers:**

President: Robert Scott Whitman  
1<sup>st</sup> Vice President: Vacant  
Treasurer: Jeremy Paye

Registrar: Leon Smith  
Secretary: Jerry Hereford  
Chaplain: Robby Jones

**Appointed Officers:**

Eagle Scout Chair: Curtis Porter  
Color Guard Commander: Kevin Forrest  
Board Director: Kurt Camp

JROTC/ROTC Chair: Kevin Forrest

**South Coast Chapter Summary:**

This past year South Coast Chapter saw its membership grow from 55 to 61 members. During 2020, due to the Covid Virus our chapter held two (2) regular meetings (Jan and Feb). The in person chapter meetings for March, April and May were cancelled due to the COVID virus. In the Fall due to the continued restriction on social gatherings the chapter held virtual ZOOM meetings in September, October and November. The chapter's annual summer picnic was also cancelled due to the COVID. The chapter Registrar was busy during 2020 with the induction of 21 new members and issued 8 supplemental certificates.

The annual election of officers normally held in November was cancelled. The chapter followed the path set out by National and extended the terms of the existing officers for one year.

Several chapter members participated in the entry of data into the Patriot Research System (PRS) and earned Lafayette Volunteer Service medals for their efforts. All of the data records (346) for the South Coast Chapter are entered into PRS.

**SOUTH COAST CHAPTER**  
**Chapter #32**  
January 1, 2020 to December 31, 2020

An update to the chapter by-laws was proposed and accepted in a vote by the chapter membership. The chapter by-laws had not been updated since the inception of the chapter in 1986. The primary motivation for the change to the Bylaws was to add the position of Color Guard and Sergeant at Arms.

The Chapter President attended the virtual CASSAR Annual Meeting in April 2020 and the virtual Fall Board of Managers meeting in November 2020. The chapter Color Guard participated in the Massing of the Colors and Wreaths Across America events. In the spring, the chapter mailed five (5) bronze ROTC medals to worthy cadets enrolled in units at local high schools. The chapter had one (1) entry in the CASSAR Eagle Scout Scholarship contest.

**Membership Summary:**

Number of members as of December 31, 2020:	76
Number of members as of January 1, 2020:	55
Number of members as of January 1, 2021:	61
New members in 2020:	21
Number of drops in 2020:	15

**Dues in 2020:**

Dues paid to CASSAR:	\$ 860
Dues paid to NSSAR:	\$ 1,530
Dues Collected:	\$ 3,310

**Financial Information**

Bank signatory's:

President: Robert Scott Whitman

Treasurer: Jeremy Paye

Secretary: Jerry Hereford

JP Morgan Chase Bank

551 Newport Center Dr.

Newport Beach, CA 92660

Balance in account as of December 31, 2020: \$11,915.

Acct. Number: XXXXXX-04717

Treasurer: Jeremy Paye  
29002 La Carreterra  
Laguna Niguel, CA 92677-4566  
(949) 485-6065  
[jtpaye@gmail.com](mailto:jtpaye@gmail.com)

**SOUTH COAST CHAPTER**  
**Chapter #32**  
January 1, 2020 to December 31, 2020

**South Coast Chapter Assets**

Chapter Medals and Certificates Inventory (Scott Whitman)

Marine Coats – 3 (Kevin Forrest), 1 (Scott Whitman), 1 (Tim Glatfelter)

Waist Coats – 2 (Kevin Forrest), 1 (Scott Whitman), 1 (Tim Glatfelter)

Round Hats – 3 (Kevin Forrest), 1 (Shane Gates), 1 (Scott Whitman), 1 (Tim Glatfelter)

Muskets – 3 (Kevin Forrest)

Drums – 1 (Kevin Forrest), 1 (Shane Gates)



# **THOMAS JEFFERSON CHAPTER**

## **Chapter #10**

January 1, 2020 to December 31, 2020

Reporting Date: March 22, 2021

Submitted by: Chapter President Gregory D. Owens

Prepared by: Chapter Secretary Stephen R. Renouf

Reporting officers:

President Gregory D. Owens

Treasurer William E. Rood

Secretary Stephen R. Renouf

### **Chapter Board:**

#### **Elected Officers:**

President Gregory D. Owens

Vice President <vacant>

Secretary Stephen R. Renouf

Treasurer William E. Rood

Registrar Derek J. Brown

Chaplain Robert J. Vernagallo

Historian <vacant>

#### **Appointed Officers:**

Sergeant-At-Arms R. Phillip Stage

Eagle Scout Chairman Jeffrey H. Brown

Essay Chairman Michael A. Wendorf

Awards Chairman Derek J. Brown

Webmaster Gary M. Bohannon

Editor Stephen R. Renouf

### **Thomas Jefferson Chapter Summary:**

The past year The Thomas Jefferson Chapter had a gain of 1 member, increasing our total membership to 106 members for the coming year (including 3 dual members). We had a number of interesting speakers at our monthly meetings in 2020. In January, Compatriot Harold K. Strunk spoke about Operation Desert Storm, of which he was a veteran. In February, DAR member Aurora Belarmino spoke about her family of American Trailblazers. In March, Contra Costa County went into Wuhan Flu Lockdown, and we were forced to cancel the March, April and May meetings at the Old Spaghetti Factory in Concord. In June, the Chapter held its first Zoom Meeting, which was a great success with 18 members and guests, including CASSAR President Don Littlefield. Dr. David Rosen spoke on the History of the Coast Guard, with emphasis on the San Francisco Bay Area. In September, Past President Howard Jones of the Silicon Valley Chapter spoke on Italian Prisoners of War in the United States during World War II, with the perspective of his father-in-law who served at a Camp in Utah. In October, Vice Admiral Thomas J. Andrews III (USN-Ret) spoke on the upcoming commissioning of the Littoral Combat Ship USS *Oakland* in 2021. In November, our speaker was unable to speak, so CASSAR President Littlefield gave a report on the state society, and the chapter held elections for 2021 chapter officers. The Thomas Jefferson Chapter presented one silver ROTC Medal a cadet at the University of California, Berkeley, and six SAR Bronze Good Citizenship Medals to US Naval Sea Cadets/Naval League Cadets from local programs. The chapter presented 21 Eagle Scout Certificates to local Boy Scouts. The

chapter presented an SAR War Service Medal, and a 50-Year Pin to a compatriot. The chapter presented 77 Flag Certificates, and one 250th Anniversary coin.

**Membership Summary:**

Number of members as of December 31, 2020:	120 (including 3 dual members)
Number of members as of January 1, 2020:	105 (including 3 dual members)
Number of members as of January 1, 2021:	106 (including 3 dual members)
New members in 2020:	22
Number of drops in 2020:	21

**Dues in 2020:**

Dues to Chapter:	\$1,600.00
Dues to CASSAR:	\$1,280.00
Dues to NSSAR:	\$2,105.00
Dues Collected:	\$4,985.00

**Financial Information**

Bank signatory's:

President: Gregory D. Owens

Secretary: Stephen R. Renouf

Treasurer: William E. Rood

Citibank, N.A.

P.O. Box 6201

Sioux Falls, SD 57117-6201

Balance in account as of December 31, 2020; \$26,672.72

Acct. Number: XXXXX1016

Treasurer: William E. Rood  
2107 Dunblane Court  
Walnut Creek, CA 94598  
(925) 937-8659

**Thomas Jefferson Chapter Assets**

Revolutionary War Uniform (Derek Brown)	\$500.00
Sierra Chapter DAR Gavel (Gregory Owens)	
US Flag and Stand (Gregory Owens)	
SAR Flag and Stand (Gregory Owens)	
Army, Navy, Air Force, and Marines Flag and stands (but no poles) (Tim Ernst)	
Oakland Chapter #10 Charter, 1958 (Stephen Renouf)	
Thomas Jefferson Chapter #16 Charter, 1992 (Stephen Renouf)	
Alameda Chapter #10 Minute Books 1925-1956 (Stephen Renouf)	
Oakland Chapter #10 Minute Books 1957-1968 (Stephen Renouf)	

## **YOSEMITE CHAPTER**

January 1, 2020 to December 31, 2020

Reporting Date: March 10, 2021

Submitted by: Chapter President Randy Dhindsa

Prepared by: Chapter Secretary Jon Russell

Reporting officers:

President Randy Dhindsa

Secretary Jon Russell

Treasurer Ryan McGuire

### **Chapter Board:**

#### **Elected Officers:**

President: Randy Dhindsa

Executive Vice President: Johnnie Smith

Vice President – Secretary: Jon Russell

Vice President – Treasurer: Ryan McGuire

Vice President – Registrar: Randy Dhindsa

#### **Appointed Officers:**

Chaplain: Robert Thompson

Historian: Theodore (Ted) Hawkins

Vice President Chapter Projects: Roy Smith

Sargent at Arms: George Ludwig

#### **Yosemite Chapter Summary:**

The past year the Yosemite Chapter grew by 8 members and had a 0% membership drop from the 2020 roster, leaving our total membership at 27 members for the coming year. Our chapter had four Zoom meetings and a meeting on the back lot of a McDonalds parking lot (which also included a shared Zoom meeting) after we were not allowed to hold an in-person meeting at our reserved facility. The Yosemite Chapter also participated in the Wreaths Across America event at the old Academy Cemetery. John Hendon represented the Yosemite Chapter with a presentation at Wreaths Across America at the Academy Cemetery in Fresno County and did a great job. The event was very successful and had a good turnout.

**Membership Summary:**

Number of members as of December 31, 2020:	27
Number of members as of January 1, 2020:	19
Number of members as of January 1, 2021:	27
New members in 2020:	8
Number of drops in 2020:	0

**Dues in 2020:**

Dues to CASSAR:	\$440
Dues to NSSAR:	\$780.00
Dues Collected:	\$1220.00

**Financial Information**

Bank signatory's:

John Hendon (Past President)

Roy Smith (VP/Secretary)

Randy Dhindsa- registrar

Ryan McGuire- Treasurer

Noble Credit Union

PO Box 8027

Fresno 93747-8027

Balance as of 12/31/2020 - \$4,526.20

Acct. Number: 0000212391

Treasurer: Ryan McGuire  
3420 W. Border Links Drive  
Visalia, CA 93291  
(559) 299-9930  
[ryanmcmoo@comcast.net](mailto:ryanmcmoo@comcast.net)

# ***Section Four***

## ***Trustee Reports***

### ***Reports:***

***NSSAR Trustee Report***

***CASSAR Trustee Report and Investment Fund Report***

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

January 1, 2020 to December 31, 2020

Reporting Date: Feb 8, 2021

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 multiple SAR Trustee meetings in May through December via Zoom
- Attended NSSAR committee meetings for Membership, Headquarters and Maintenance, and the Public Service and Heroism Committees via Zoom
- Developed a new member manual as part of a NSSAR Membership Committee subcommittee and released in August 2020 to CASSAR officers and chapters presidents
- Entered approximately 350 member records into PRS in November-December
- Continuing as Trustee (California) for 2020-2021 (2<sup>nd</sup> year) due to COVID-19
- Continuing as Inspector General for NSSAR (2<sup>nd</sup> year) – all investigations closed out

#### CASSAR

- Attended CASSAR Spring 2020 meeting and Fall 2020 BOM meeting via Zoom
- Chaired CASSAR Nominating Committee for 2021 officer interviews and nominations

#### Chapter

- Attended chapter meetings for the Thomas Jefferson, General George Washington, San Francisco, Sacramento and Orange County chapters (in person/via Zoom)
- Attended meetings of Battle Born Patriots chapter (NVSSAR – in person) and Hawai'i Executive Board (HISSAR – via Zoom)
- Elected as registrar for TJ Chapter; first-line signer for 26 new member applications submitted during the period Jan 1, 2020 – Jan 1, 2021. Re-appointed as Medals & Awards chair

#### Other

- SAR – Dual member, Nevada and Hawai'i State Societies
- DAR – Essay judge (Jose Maria Amador chapter DAR)

Respectfully Submitted,

Derek J. Brown, PE

Trustee, California (2019-2021)



# **TRUSTEES of the CASSAR INVESTED FUNDS**

## **CASSAR Annual Meeting**

**March 1, 2021**

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 March 1, 2020:  
**\$431,525.01.**

The ending value of the Invested Fund on February 28, 2021:  
**\$506,187.31.**

During the 12-month period described above, the total funds in the accounts increased by **\$74,662.30**. The increase was due to a strong stock market following the correction in February 2020, despite the Wuhan Virus pandemic.

## **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 February 28, 2021:

### **LIFE MEMBER FUND: \$191,596.45**

Cash	\$12,749.77	6.65%
Equities	\$103,892.02	54.23%
Fixed Income	\$62,920.55	32.84%
Alternatives	\$12,034.11	6.28%

**Return: 18.10% Last 12 Months; 5.46% Since Inception (on 10/7/2010)**

Allocations:	ACTUAL	TARGET
<b>Cash</b>		
Global Cash	6.65%	7.00%
<b>Equities</b>		
US Large Cap Growth	16.09%	12.00%
US Large Cap Value	14.11%	14.00%
US Small Cap Growth	6.22%	5.00%
US Small Cap Value	6.22%	4.00%
International Equities	7.77%	7.00%
Emerging Markets Equities	3.82%	3.00%
<b>Fixed Income</b>		
Short Term Fixed Income	21.74%	25.00%
US Taxable Core	11.09%	18.00%
<b>Other</b>		
REITs	1.84%	2.00%
Commodities	4.45%	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 February 28, 2021:

<b>EDUCATION FUND:</b>	<b>\$71,377.72</b>	
Cash	<b>\$4,865.61</b>	<b>6.82%</b>
Equities	<b>\$34,439.84</b>	<b>48.25%</b>
Fixed Income	<b>\$27,411.02</b>	<b>38.40%</b>
Alternatives	<b>\$4,661.25</b>	<b>6.53%</b>

**Return: 17.72% Last 12 Months; 6.11% Since Inception (on 10/7/2010)**

Allocations:	ACTUAL	TARGET
<b>Cash</b>		
Global Cash	6.82%	7.00%
<b>Equities</b>		
US Large Cap Growth	13.73%	12.00%
US Large Cap Value	13.15%	14.00%
US Small Cap Growth	3.52%	5.00%
US Small Cap Value	7.60%	4.00%
International Equities	6.99%	7.00%
Emerging Markets Equities	3.26%	3.00%
<b>Fixed Income</b>		
Short Term Fixed Income	22.51%	25.00%
US Taxable Core	15.89%	18.00%
<b>Other</b>		
REITs	1.88%	2.00%
Commodities	4.65%	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 February 28, 2021:

<b>PERMANENT FUND:</b>	<b>\$121,653.33</b>	
Cash	\$5,884.74	4.84%
Equities	\$76,346.99	62.76%
Fixed Income	\$26,520.36	21.80%
Alternatives	\$12,901.24	10.60%

**Return: 19.89% Last 12 Months; 6.72% Since Inception (on 10/7/2010)**

Allocations:	ACTUAL	TARGET
<b>Cash</b>		
Global Cash	4.84%	5.00%
<b>Equities</b>		
US Large Cap Growth	16.75%	17.00%
US Large Cap Value	17.03%	21.00%
US Small Cap Growth	3.26%	5.00%
US Small Cap Value	8.16%	5.00%
International Equities	13.69%	14.00%
Emerging Markets Equities	3.85%	4.00%
<b>Fixed Income</b>		
Short Term Fixed Income	13.19%	9.00%
US Taxable Core	8.62%	10.00%
<b>Other</b>		
REITs	4.63%	7.00%
Commodities	5.98%	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 February 28, 2021:

<b><u>CONGRESS FUND:</u></b>	<b><u>\$18,521.02</u></b>	
Cash	<b>\$916.98</b>	<b>4.95%</b>
Equities	<b>\$11,506.85</b>	<b>62.13%</b>
Fixed Income	<b>\$4,142.53</b>	<b>22.37%</b>
Alternatives	<b>\$1,954.66</b>	<b>10.55%</b>

**Return: 21.15% Last 12 Months; 17.23% Since Inception (on 1/6/2020)**

Allocations:	ACTUAL	TARGET
<b>Cash</b>		
Global Cash	4.95%	5.00%
<b>Equities</b>		
US Large Cap Growth	16.26%	17.00%
US Large Cap Value	16.27%	21.00%
US Small Cap Growth	3.33%	5.00%
US Small Cap Value	8.36%	5.00%
International Equities	13.25%	14.00%
Emerging Markets Equities	4.65%	4.00%
<b>Fixed Income</b>		
Short Term Fixed Income	13.53%	9.00%
US Taxable Core	8.84%	10.00%
<b>Other</b>		
REITs	4.72%	7.00%
Commodities	5.84%	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 February 28, 2021:

### **UNALLOCATED FUND: \$103,038.79**

Cash	<b>\$17,777.53</b>	<b>17.25%</b>
Equities	<b>\$34,884.41</b>	<b>33.86%</b>
Fixed Income	<b>\$50,376.85</b>	<b>48.89%</b>
Alternatives	<b>\$0.00</b>	<b>0.00%</b>

**Return: 11.47% Last 12 Months; 5.74% Since Inception (on 7/22/2015)**

Allocations:	ACTUAL	TARGET
<b>Cash</b>		
Global Cash	17.25%	18.00%
<b>Equities</b>		
US Large Cap Growth	8.65%	7.00%
US Large Cap Value	7.10%	7.00%
US Mid Cap Growth	1.30%	1.00%
US Mid Cap Value	1.57%	1.00%
US Small Cap Growth	1.55%	1.00%
US Small Cap Value	1.10%	1.00%
International Equities	8.61%	8.00%
Emerging Markets Equities	3.98%	3.00%
<b>Fixed Income</b>		
Short Term Fixed Income	19.45%	21.00%
US Taxable Core	19.06%	21.00%
International Core Fixed Income	4.56%	5.00%
Inflation Linked Securities	1.83%	2.00%
High Yield Fixed Income	1.99%	2.00%
Emerging Market Fixed Income	2.00%	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.**

On March 6, 2020, the Morgan Stanley 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. The trustees decided to wait.

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. There was still a lot of volatility with the lingering pandemic, and the national elections. The Trustees decided to wait until there was less volatility in the market.

The Trustees set up a call with the Advisor for March 18, 2021 to discuss increasing the risk profile approved in 2020. We will verbally report on this call at the Annual Meeting in April 2021.

## **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.

## **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

## ***Section Five***

# ***CASSAR Bylaws and CASSAR Articles of Incorporation***

# **CALIFORNIA SOCIETY SONS OF THE AMERICAN REVOLUTION BYLAWS**

## **Bylaw No. 1 MEMBERSHIP**

Membership application forms and procedures, evidence of membership and designation of a member shall be as set forth in the National Society of the Sons of the American Revolution (“NSSAR”) Bylaw No. 1.

## **Bylaw No. 2 STATE SOCIETY AND CHAPTERS**

Section 1—The California Society (CASSAR or society) shall regulate all matters pertaining to its own affairs, subject to the provisions of the constitution and bylaws of the NSSAR, particularly NSSAR Bylaw No. 2. “State Societies and Chapters,” sections 1 through 10.

Section 2—New chapters may be formed by petition of ten or more members of the society. After investigation, the Executive Committee may authorize the formation of a chapter. The Executive Committee shall verify that the new chapter’s bylaws are consistent with those of this Society and NSSAR. If approved by the Executive Committee, a copy of the bylaws of the new chapter will be filed with the Secretary.

Section 3—Each chapter should hold not less than four (4) meetings each year including an annual meeting for the election of officers. Each chapter shall submit to the society a report of its programs during the administration year ending with its annual meeting, including a financial statement, and the additions, transfers and deaths and any other changes in membership, and such other matters as shall be required by the board, which shall be filed with the state secretary on or before March 31, and at such other times as the board may designate.

(a)—The financial statement included in the annual report for each chapter shall contain the following information for all accounts deposited with financial institutions: 1) The name and address of the financial institution; 2) The name, type and number of the financial account; 3) The date of the last statement and the account balance at that time; and 4) The names of the members or officers having signatory authority over the account.

(b)—Any officer of a chapter who fails to surrender records or funds to the state society on demand pursuant to section 5 below shall be immediately suspended from membership in the state society pending disposition by a committee of inquiry convened under the provision of Article X of the Restated Articles of Incorporation of the California

Society of the Sons of the American Revolution (the Articles of Incorporation). (It is a criminal offense under section 504 (Embezzlement) of the California Penal Code for an officer or an agent of a public or private corporation or association to fraudulently appropriate to any use not

in the due and lawful execution of his trust, any property which he has in his possession, or under his control by virtue of his trust, or who secretes it with a fraudulent intent to appropriate it to such use or purpose).

Section 4—A chapter may be adjudged by the board to have forfeited its charter from the society should it fail to fulfill its duties to the society and particularly should it: (1) fail without good reason to hold at least four (4) meetings in any year; (2) fail to hold an annual meeting and to elect officers; (3) fail to report to the board on the meetings as prescribed; or (4) fail to make return of and pay the monies due the society.

Section 5—Upon the cessation or closing out of a chapter of the CASSAR, all money, files, archives, properties, books, book cases, furniture, color guard uniforms, office machines (including fax machines, computers, typewriters and word processors), and other equipment shall become the property of the state society, and shall be turned over to the board. If the chapter is reinstated within two years, the money and equipment as described in a certified inventory shall be returned to the said chapter. If not reinstated, the items shall be converted or disposed of by the board for the good of the society.

(a)—Conditional Gifts—Should there be any gifts, bequests or donations that had been received by such a chapter under a written agreement that such property would be used only for a specific purpose, it shall be the responsibility of the society to continue to honor the terms of such an agreement, or obtain the consent of the donor to other uses, or return the property to the donor or the donor's legal representative. Any such conditional gifts so received by the society will be deposited by the treasurer in a restricted account, or maintained by any other officer receiving custody of such property in a segregated manner, to be used only for the purpose specified in the agreement with the donor. In no case will conditional gifts be commingled with other property of the society, or deposited in the general fund without the expressed consent of the donor.

Section 6—Without a prior written agreement to the contrary, any work done by a member for, or on behalf of the society, is the legal property of the society.

Section 7—Any member or chapter that maintains funds or property belonging to the society shall submit a status report on those assets to the chairman of the Budget and Planning Committee prior to each state meeting. At all times such state funds will be separately accounted for by the member or chapter having custody of them.

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### Bylaw No. 3 BOARD OF MANAGERS

Section 1—The board shall have management and control of the property and affairs of this society and be responsible for the promotion of its objects.

Section 2—The board shall comprise the elected officers of this society and the elected president of each chapter in good standing or his designee as alternate.



## **Bylaw No. 4 OFFICERS, POWERS AND DUTIES**

**Section 1—OFFICERS—**The officers of this society shall be president, immediate former president, executive vice president, two vice presidents designated vice president north and vice president south, vice president for membership, secretary, treasurer, registrar, historian, genealogist, chancellor, chaplain, surgeon and three trustees of the invested funds. Prior designation shall not change until incumbent has been replaced. They shall all serve without compensation. The officers, except the immediate former president and the vice president for membership, shall be elected at each annual meeting of the society by the delegates, and except for the trustees of the invested funds and the vice president for membership, shall hold office for one year or until their successors have been elected and qualified. The vice president for membership shall be elected, for a two-year term, and each of the trustees of the invested funds shall be elected for a three-year term, staggered such that one expires each year, except when there is more than one vacancy, in which case different terms will be required so that only one trustee term will expire each year. The term “most senior past president” shall mean the most recent former president.

**Section 2—PRESIDENT—**The president shall preside at all meetings of this society and of the board and have a casting vote. He shall exercise the usual functions of a presiding officer, and shall enforce strict observance of the articles of incorporation and the bylaws. He shall make the designations required by Article III, Articles of Incorporation, and shall appoint all committees not otherwise provided for. In the absence of the president at any meeting or his incapacity to continue in service for any reason, his duties shall be assumed by other officers in the following order: executive vice president, the vice president from the opposite part of the state to the executive vice president, the remaining vice president north or south, the vice president for membership, and other elected officers in order of precedence listed in section 1 above.

**Section 3—VICE PRESIDENTS—**Each vice president shall assist the president in such duties as he shall be assigned.

(a) The executive vice president shall function statewide and be resident of the opposite part of the state from that of the president. As president-elect, he shall be listed on the ballot but not be required to stand for

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election to the office of president.

(b) The vice president north shall be resident in the northern part of the state and the vice president south shall be resident in the southern part of the state. The vice president resident in the opposite part of the state from the executive vice president shall be senior to the other vice president north or south in the line of succession. The vice presidents north and south, in their respective parts of the state, shall be assigned oversight responsibility for the operation and management of the chapters to include membership retention programs.

(c) The vice president for membership shall function statewide and shall provide guidance and assistance to the chapters in membership recruiting. The incumbent of this office is not in the line of progression.

#### Section 4—SECRETARY.

(a) The secretary shall conduct the general correspondence of the society and such other matters as may be directed by the board or president. He shall have charge of the seal, articles of incorporation, bylaws and records of the society and, together with the presiding officers, shall certify all acts of the society. He shall keep fair and accurate records of all memberships, proceedings and orders of the society, and shall give notice to the several officers of all votes, orders, resolves and proceedings of the society affecting them or appertaining to their respective duties. He shall notify all members of their election, and shall, under direction of the president, give due notice of the time, place and agenda of all meetings of the society or board and shall attend the same. He shall send or mail a copy of the minutes of the board to each of its members when directed to do so by the board.

(b) The secretary, on receipt of the approved applications and certificate, shall himself sign the certificate of membership, supplemental and youth certificates, and forward it to the president for his signature and include the proper information to forward it to the new member's chapter secretary with postage affixed. The state secretary shall include the transmittal form and complete it within 20 days from date posted from the national society.

(c) The secretary shall maintain a photocopy of each approved application, which may be a digitally imaged copy, of the recorded copy received from the national society.

Section 5—TREASURER—The treasurer shall collect and keep the general operating funds of the society. They shall be deposited in a banking institution approved by the board and shall be placed to the credit of the CALIFORNIA

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SOCIETY OF THE SONS OF THE AMERICAN REVOLUTION. The treasurer shall expend funds of the society only as directed by the board through adoption of a budget or by specific direction for a particular item. Contracts for unbudgeted expenditures in excess of \$1,000 shall be pre-approved by the Executive Committee. Funds shall be authorized by a check request signed by any two (2) officers so authorized. He shall keep a true account of his receipts and disbursements and at each annual meeting render the same to the society. He shall also make such other reports as may be requested by the board.

Section 6—REGISTRAR—The registrar shall examine all applications for membership in the society for substantive completeness. The registrar shall report those found by him to be substantively complete to the board or agent it may designate. If the application is found by the registrar to be substantively incomplete, he shall bring the deficiency to the attention of the relevant chapter registrar with a concise explanation as to wherein the application is incomplete.

All communication with an applicant for membership shall be made by the appropriate chapter. The registrar will examine and process supplemental applications in the same manner as regular applications. The registrar shall receive and forward to NSSAR, all applications for membership found to be a substantively complete, together with admission fees as required, and shall maintain the file of duplicate applications. In the event of disagreement on substantive completeness, the matter shall be referred to the state genealogist who will make a final CASSAR determination of the matter.

**Section 7—HISTORIAN**—The historian shall obtain and preserve material relating to the history of this society, its chapters and its membership, including but not limited to medals and awards presented, news clippings, records of historical and commemorative meetings, minutes of meetings, names of officers, biographical and genealogical materials and obituaries. He shall from time to time forward appropriate materials to the editor of the California Compatriot, the NSSAR magazine or the NSSAR historian general. He shall supervise the preparation and printing of any society historical publications, other than those of membership rolls, which may be authorized by the board.

**Section 8—GENEALOGIST**—The genealogist shall assist the registrar and the board and any member of the society who may appeal to him for help in preparing application papers for membership. If the research is extensive, the genealogist shall be allowed to negotiate appropriate fees, without cost to the society. He shall examine all appeals from decisions or lack of action by the registrar. He shall report to the board on all matters that come before him.

**Section 9—CHANCELLOR**—The chancellor shall be an attorney-at-law and it shall be his duty to give opinions on all legal matters affecting the society when such questions are referred to him by the proper officers or by the board. He shall act as parliamentarian at meetings of the society and the board. Should he not so serve the president may appoint a substitute to act as parliamentarian.

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**Section 10—CHAPLAIN**—The chaplain shall open and close meetings of the society and of the board with religious services usual and proper on such occasions, when so directed by the president or by the chairman of the meeting.

**Section 11—SURGEON**—The surgeon shall be a person licensed by the state to be a physician. He shall inform and advise the board on matters relating to public health which may be of concern to this society and to render first aid in cases of emergency at such meetings as he may attend.

**Section 12—TRUSTEES OF THE INVESTED FUNDS**—They shall select one of their members as chairman, and he shall have charge of all records and have the power to call a meeting of the trustees whenever he deems it necessary.

(a) They shall manage and invest moneys, securities and property which may accrue to the permanent fund, the education fund, the congress fund, the unallocated fund, and/or the life membership fund in the names of the "Permanent Fund of the California Society, Sons of the American Revolution," the "Education Fund of the California Society, Sons of the American Revolution," the "Congress Fund of the California Society, Sons of the American Revolution," the "Unallocated Fund of the California Society, Sons of the American Revolution," and the "Life Membership Fund of the California Society, Sons of the American Revolution," respectively, in accordance with the Uniform Prudent Management of Institutional Funds Act. The funds shall be invested in a financial institution or investment account approved by the board in accounts named "Permanent Fund of the California Society, Sons of the American Revolution," "Education Fund of the California Society, Sons of the American Revolution," "Congress Fund of the California Society, Sons of the American Revolution," "Unallocated Fund of the California Society, Sons of the American Revolution," and "Life Membership Fund of the California Society, Sons of the American Revolution," respectively, in which all funds received by the trustees shall be deposited, including dividends, interest, net rents and the proceeds of property sold. Any such funds deposited therein may be withdrawn or transferred only on the signature of at least two trustees, which signature shall not be unreasonably withheld.

(b) Withdrawal of income from investments or accounts may be made only as provided in bylaw No. 9. Only interest, dividends, unrealized gains, and net rents may be included in calculating such income. Where an investment, such as a money market account, has checking privileges, the trustees may use it for the banking institution account.

(c) Status reports shall be presented to the board at the fall meeting and at the meeting closest preceding the annual meeting of membership and to the treasurer at least ten days before the annual meeting. Such report for

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the spring meetings shall include the amount available at the end of the fiscal year just concluded, and for the fall meeting, an estimate of the amount to be available at the end of the fiscal year, for use as provided in bylaw No. 9, together with a recommendation for a specific use that meets the patriotic, historical and educational purposes of the society.

(d) The chairman of the invested fund shall provide to the Treasurer a copy of each statement as it is received from any institution in which Invested Fund assets are invested. If on-line access is available, the Chairman shall ensure the Treasurer is authorized to access the account information on-line.

(e) Trustees shall select a Chairman not later than the close of the Spring Annual Meeting.

**Section 13—VACANCIES IN OFFICE—**A vacancy in any elected office (other than that of president) may be filled by the president on an interim basis until such time when it shall be filled by the vote of a majority of the board. Any vacancy not filled by the board shall be filled by the members at the annual meeting or special meeting of the membership.

## Section 14—INCAPACITY

(a) President – an incapacity of the President that does not constitute a vacancy of office shall be determined by the Executive Committee by majority vote upon motion by any member of the Executive Committee, and a minimum of 15 (fifteen) days' notice to the President. The motion and vote may be conducted electronically. In addition, the President may declare a condition of incapacity and the duration thereof by written communication to the Secretary. During such incapacity of the President, the Executive Vice-President shall assume the duties of the President. If the Executive Vice-President is unavailable or incapacitated, such person as designated by the Executive Committee shall assume the Presidential duties.

(b) Other Officers – The Executive Committee, upon motion made by any member of that committee and majority vote, may declare any other officer to be incapacitated if that officer is unable, because of mental or physical disability, to fulfill the duties of his office. The officer shall have at least fifteen (15) days' notice of the motion. Upon passage of the motion, the President shall appoint another member to fill the incapacitated officer's unexpired term, which appointment shall be ratified by the Executive Committee. Upon such appointment, the incapacitated officer or representative or family member acting on his behalf, shall immediately transfer all books, records, materials and CASSAR assets in his possession to the newly-appointed officer.

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## Bylaw No. 5 COMMITTEES

Section 1—NOMINATING COMMITTEE— The members of this committee shall be 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. If there are not enough past presidents who are able and willing to serve, then the president may fill such vacancy on the committee by appointment of other members currently active at the state level, providing that the appointment seeks to equalize the representation between the north and south of the state, and no appointee shall come from a chapter already represented on the committee. The chairman of the committee shall be the most recent past president on the committee after the immediate past president.

(a) At least forty-five (45) days prior to each annual meeting, the chairman of the Nominating Committee shall provide the secretary with a list of proposed nominations for each elected office together with nominees for national trustee and alternate national trustee. All candidates for elective state office must be endorsed in writing by their chapter in a letter that includes: (i) a statement from the candidate that the candidate consents to serve; (ii) a statement from the chapter president or his designee endorsing the candidacy; and (iii) a brief biographical statement. Incumbents of elective state offices who are seeking reelection to the office they presently hold are excused from this requirement.

(b) At least thirty (30) days prior to each annual meeting, the secretary shall provide a copy of the list of proposed nominees to each member of the board.

(c) A member of the committee may be a candidate for an elective state office. However, that member may not participate in any discussions for that elective office, may not be present when that office is discussed and must recuse himself from any vote or decision concerning the compatriot whom shall be nominated for that state office.

**Section 2—STANDING COMMITTEES—**The following are required committees for which the president shall appoint a chairman when one is not otherwise indicated, and may appoint directly or with the chairman's recommendation, other members to the committee:

(a) **BUDGET AND PLANNING COMMITTEE.** It shall be comprised of the executive vice-president (who shall be chairman); the vice president north; the vice president south; the treasurer; and a chapter president from the north, and a chapter president from the south, appointed by the state president. The state president shall appoint a state officer to replace the executive vice president, vice president north, and vice president south, if any of them are unable to serve on the committee.

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The chairman of the invested funds trustees shall be a non-voting member of the committee. They shall estimate income and expenditures, and recommend such fiscal actions as they consider in the best interests of the society. One of their main duties is to prepare a recommended annual budget for the following year.

(b) **AUDIT COMMITTEE.** It shall be comprised of the executive vice- president (who shall be chairman); the vice president north; the vice president south; and a chapter president from the north, and a chapter president from the south, appointed by the state president. The state president shall appoint a state officer to replace the executive vice president, vice president north, and vice president south, if any of them are unable to serve on the committee. The treasurer and the chairman of the invested funds trustees shall be non-voting members of the committee. At least one member of the Audit Committee shall be 'financially literate' meaning substantial prior experience and knowledge of financial matters. It shall audit the books and records of the treasurer and of the trustees of the permanent fund, and shall report to the president at the annual meeting.

(c) **MEETINGS AND CREDENTIALS COMMITTEE.** With the executive vice president as chairman, the committee shall supervise arrangements for meetings and determine voting eligibility. The presidents of the respective host chapters for the various meetings of the board and of the society, together with such chapter members as each of these chapter presidents shall deem necessary, shall be the other members of this committee. The committee shall maintain the list of eligible voters, contact all chapters to confirm their delegates, chapter presidents (or official designee), and state officers. The committee shall provide the list of eligible voters to the secretary for the roll call and determination of a quorum. They should object when one person

answers present as an officer, and as a member of a chapter. They shall produce the voting cards for the meetings where voting is restricted so we do not count ineligible votes.

(d) **MEMBERSHIP COMMITTEE.** The vice president for membership shall be chairman. The chairmen of the chapter membership committees shall serve as members of this committee. It shall solicit and encourage candidates for membership to file applications and join the society.

(e) **AMERICANISM AND PATRIOTIC EDUCATION COMMITTEE.** It shall encourage the patriotic activities of this society and assist and advise the chapters in these matters. It shall recommend to the board specific utilization of income from the president's education fund and the CASSAR education fund.

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(f) **CHAPTER ACTIVITIES AND AWARDS COMMITTEE.** It shall encourage chapters and members to engage in activities to stimulate interest in the patriotic, historical and educational objects of the society and to arrange for appropriate rewards to the most active chapters and members.

(g) **SCOUT PROGRAM COMMITTEE.** It shall conduct society participation in the annual Eagle Scout contest sponsored by NSSAR, interfacing with NSSAR, and shall encourage chapter participation in appropriate scout activities.

(h) **PUBLICATIONS COMMITTEE.** It shall be responsible for all California society publications except the CALI FORNIA COMPATRIOT and the president's newsletter, the PATRIOT VOLUNTEER. They will assist and encourage the chapters where possible and will recommend the winner of the California Society Publication Award to the president.

(i) **BYLAWS AND RESOLUTIONS COMMITTEE.** It shall prepare the language for any proposed amendments to the Articles of Incorporation, and the bylaws and proposed resolutions of this society. It shall cause the required notice to be given to the chapters of proposed amendments, and shall bring for dispositive action all properly noticed proposed amendments before the annual meeting of the membership and all prepared resolutions before the meetings of the society. The chancellor shall be a member of this committee.

(j) **ETHICS COMMITTEE.** The Ethics Committee shall consist of the CASSAR Chaplain, CASSAR Chancellor, and a Past President, as chosen by the current President. The CASSAR Chaplain shall be the Committee Chairman. If the CASSAR Chaplain abstains from voting on ethics matters brought before the committee, he shall appoint a Compatriot in good standing to the Ethics Committee at his discretion as a replacement voting member, ensuring an odd number of voting committee members.

**Section 3—Special Committees—**Special committees, as deemed appropriate by the president, may be appointed by him for his term of office. The president shall be an ex-officio member of all standing and special committees.

**Section 4—Program Managers—**To facilitate management control and staff supervision over the operation of the standing and special committees of the society the president shall appoint for his term of office program managers to guide and advise the president and committee chairmen on functional performance within the society.

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#### **Bylaw No. 5(a) THE EXECUTIVE COMMITTEE**

**Section 1—** There shall be a CASSAR executive committee with a total membership of nine. The executive committee shall be composed of the president, the immediate past president, the four vice presidents (executive, north, south and membership), the secretary, the treasurer, and the chancellor.

**Section 2—**The executive committee shall meet at the call of the president at such time as he determines that business of the society is of such urgency that it may not be postponed until an appropriate regular or specially noticed meeting.

**Section 3—**All decisions of the executive committee which are within the purview of the membership's or the board's powers of approval are on an interim basis and must be ratified or rejected at the next regular meeting of the appropriate forum. The executive committee may take no action in contravention of the Articles of Incorporation.

**Section 4—**The secretary will record the business of all meetings of the executive committee and disseminate it to members of the committee. The chancellor shall act to assure ratification or rejection of decisions of the committee so required at the next regularly scheduled meeting of the appropriate forum.

**Section 5—**The Executive Committee is the "governing body" for purposes of review and approval of required Internal Revenue Service forms and reports and for purposes of compliance with Federal and State law.

#### **Bylaw No. 6 MAGAZINE**

The president shall appoint a member to be the editor of the CALIFORNIA COMPATRIOT, the publication of the society.

#### **Bylaw No. 7 FEES AND DUES.**

**Section 1—**The admission fee for membership shall be that currently declared by NSSAR Bylaw No. 22, Section 1. The fee for each supplemental claim to establish additional ancestral lines of eligibility shall be that currently declared by NSSAR Bylaw No. 22, Section 3, plus that fee currently declared by the board. The fee for Memorial Memberships shall be that currently declared by the NSSAR, plus a fee declared by the board.



Section 2—The annual dues for all members shall include the per-capita due to NSSAR, plus that due to this society, plus that due to the chapter. NSSAR dues currently declared are NSSAR Bylaw No. 22, Section 3. The board shall recommend to membership at the annual meeting the per-capita amount for this society. Each chapter shall determine the per-capita amount due to the chapter and shall collect the total dues from its members.

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Section 3—The business year and fiscal year for this society is from January 1 through December 31 of the same year. The per-capita annual dues for those amounts payable to NSSAR and to this society shall be paid by each chapter to the state secretary by January 5 of each year. A member is delinquent in payment of annual dues after December 15th and shall automatically be suspended and shall be dropped from membership after December 31. Each chapter shall prepare an annual reconciliation report and submit to the society secretary on or before January 5th of the following year. New members approved and registered by NSSAR on or after the date approved and registered by NSSAR do not pay NSSAR dues for the balance of the calendar year per NSSAR Bylaw No. 22 and the dues for this society are similarly waived.

Section 4— A member whose membership has been terminated, whether for nonpayment of dues or otherwise, may be reinstated by payment of the current chapter, state and national dues to the treasurer, provided that his request for reinstatement first be approved by the appropriate chapter and the Executive Committee. Upon application for reinstatement, the Secretary shall forward the request via email to the Executive Committee, which shall be deemed to have approved the request unless any member of the Executive Committee objects within five days of notice. Upon timely objection, the President shall schedule a meeting of the Executive Committee, which may be held electronically, permitting the concerns to be discussed and a vote taken. If the request is denied, the applicant may appeal to the Board of Managers. Upon approval, the state secretary will advise the NSSAR thereby entering him as a member in good standing.

Section 5—Where there is evidence that hardship or misfortune may cause the lapse of payment of dues, a chapter or the board may grant to any member an exemption for that year's dues. The NSSAR no longer excuses such dues. The chapter or the board making such exemption must make provision to pay NSSAR dues for such members.

Section 6— Any Regular Member in good standing after April 12, 2014, who is also a NSSAR Life Member, and who shall make payment in accordance with a fee schedule established by the Executive Board with input from the Trustees of the Investment Funds shall become a CASSAR Life Member and shall thereafter be exempt from payment of all required annual dues to the California Society and his chapter within the California Society. The one-time payment shall be added to the CASSAR LIFE MEMBERSHIP FUND and the income therefrom shall be utilized to pay the annual dues components to this society and to the chapter to which he subsequently belongs. Members of CASSAR who have previously paid for a CASSAR Life Membership prior to April 12, 2014, will continue to have their dues payments cover NSSAR, CASSAR, and their chapter dues payments. Non-CASSAR members who obtain a CASSAR Life Membership plan

shall thereafter be exempt from payment of all required annual dues to the California Society and his chapter within the California Society.

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Section 7—Upon transfer of membership from one chapter to another, the dues for the year in which the transfer is made shall be paid to and belong to the remitting chapter and must be paid before the transfer is approved, said transfer to be accomplished by letter from the transferring member to the state secretary and the secretaries of the two chapters involved. Transfers from one state society to another shall be in accordance with NSSAR Bylaw No. 2, section 9.

Section 8—A member in good standing may become a dual member of another chapter (secondary) upon approval by a majority of its elected officers and the payment of dues of that chapter. This form of membership provides for the opportunity to attend meetings, activities and events of the secondary chapter. However, such membership does not provide for the privilege of voting or holding office in the secondary chapter.

Section 9—An emeritus member is defined as a member of the CASSAR who has paid dues to the CASSAR for fifty years (does not have to be continuous). Upon reaching emeritus member status, the member shall be exempt from paying all additional CASSAR and chapter dues.

#### Bylaw No. 8 MEETINGS AND DELEGATES Section 1—MEETINGS OF THE SOCIETY

(a) A meeting of the membership shall comprise all members of this society in attendance who are in good standing but the right to vote shall be limited to one vote for each such member who is either an elected chapter delegate or an elected society officer.

(b) Each chapter shall be entitled to two elected delegates plus one additional elected delegate for each fifty (50) members of the chapter as determined by the January 1 membership count of the current year listed on the Annual Reconciliation Report filed and approved by the state secretary preceding the date of the meeting.

(c) A quorum at any meeting of the membership or of the Board shall be a majority of total of (a) the elected state officers plus (b) one delegate from each chapter. A quorum for purposes of a vote on a proposed bylaw amendment shall be the majority of chapters. Except as otherwise specified in these bylaws, the affirmative vote of a majority of the voting power present shall be necessary to approve any action of the meeting.

(d) The annual meeting of the membership shall be held the third Saturday in April, unless the executive committee fixes another date and so notifies all members of record as soon as practicable but not less than ninety (90) days prior to the date of such annual meeting. The meeting shall be held at a location selected in advance by the executive committee. Such location to be alternated on an annual basis between the

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northern and southern areas of the state.

(e) The following order of business is suggested for the annual meeting of the membership:

1. Call to order by the president
2. Invocation
3. Pledge of allegiance and opening ritual
4. Credentials Committee report & roll call of delegates
5. Presentation of minutes of previous annual meeting
6. Address of president
7. Reports of officers
8. Chapter reports
9. Report of auditing committees
10. Reports of standing committees
11. Reports of special committees
12. Old and unfinished business
13. New business
14. Election of officers
15. Appointment of committee chairmen
16. Closing ritual and adjournment

(f) Special meetings of the membership may be called by the president or by the board from time-to-time. The general nature of the business to be transacted shall be stated in the notice of meeting and no other business shall be transacted at the meeting.

(g) Not less than twenty (20) days prior to the date of any annual or special meeting of the membership, the secretary shall transmit notice of the time, place and agenda thereof to each chapter secretary and to each member who, on the record date for notice of meeting is entitled to vote thereat. (Corp. Code §5511.) Notice shall be transmitted either electronically and by posting on the CASSAR website.

(h) Only members who are registered to attend the meetings of the members or Board of Managers shall be permitted to vote at those meetings.

(i) The Executive Committee, Board of Managers, Membership, and all Committees of the State Society may participate in special meetings, or conduct a meeting, including the Annual Meeting of the Membership, through use of any means of communication by which all individuals participating may simultaneously hear each other during the meeting. This provision shall allow for the use of the Internet, a conference telephone, video conference or other communications method so long as all individuals participating in the meeting can communicate with each other at the same time. A participant in a meeting by this means is deemed to be present at the meeting. Voting on all matters shall be

permitted, with votes cast by individualized voice vote of the participants or by an electronic vote tabulation means by which the Chairman of the meeting shall be able to confirm the submission of a vote by an individual member. Proxy voting shall not be permitted. This provision shall be interpreted to permit any electronic means that combines voice and/or video communication with capability of document sharing either in advance of or during the meeting.

(j) In an emergency, the time and location of an Annual Meeting, Fall BOM meeting or any Special Meeting may be changed by the affirmative vote of two-thirds of the Executive Committee voting upon the question by electronic means; provided that votes by electronic means shall be returned to the President and Secretary within five days after the solicitation of said votes.

## Section 2—MEETINGS OF THE BOARD

(a) Two (2) regular meetings of the board shall be held annually, one as soon as is practicable following adjournment of the annual meeting of the membership for the purposes of organization and for the transaction of other business properly presented. A second shall be held the first Saturday in November, alternately in the northern and southern areas of the state, unless otherwise scheduled by the board as soon as practicable, but not less than ninety (90) days prior to the date of such second meeting.

(b) Special meetings of the board may be called from time-to-time by the president upon written request of five (5) members of the board; provided, however, that should the president fail or neglect to do so, such five (5) members may call such special meeting, and, in either case, the secretary shall give notice thereof. No business shall be conducted in any special meeting except that specified in the notice.

(c) A majority of the number of board members authorized by article IV of the Articles of Incorporation constitutes a quorum of the board for the transaction of business. Every act or decision done or made by a majority of the board members present at a meeting duly held at which a quorum is present is the act of the board. (Corp. Code § 5211) Each board member shall have only one vote notwithstanding he may hold two positions each of which qualifies him for board membership.

## Section 3—CONDUCT OF MEETINGS

All meetings of this society, of the board and of committees shall be - 15 -

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conducted in accordance with these bylaws, or where they are silent, by the provisions of the most recent edition of Robert's Rules of Order, Newly Revised.

## Section 4—ELECTIONS

(a) Elections of officers shall be by ballot provided that by unanimous consent of the electing body, election by ballot may be waived as to any office, if, after nominations for that office are

declared closed, only one has been nominated for that office. There shall be no cumulative or proxy voting.

(b) VOTING RIGHTS—The voting rights of delegates to state meetings as expressed in the articles and bylaws are restated as follows:

(i) General Provisions—At all meetings of the state society: (a) there shall be no voting by proxy; (b) a chapter president may designate another member in good standing from his chapter to vote as an acting chapter president at any meeting of the society if the chapter president is absent from the meeting or is an elected society officer; however, any such designation must be made in writing presented to the secretary prior to the chapter roll call and must remain in effect for the duration of that meeting; (c) each delegate is entitled to only one vote regardless of the number of state offices he may hold or the number of chapters he may hold membership in; (d) a chapter cannot be represented by a member holding only a dual membership in that chapter; and (e) the presiding officer of the meeting may only cast his vote to break a tie.

(ii) Regular or Special Meetings of the Board of Managers. At all meetings of the board, voting is restricted to the state president, the immediate former state president, the elected officers of the state society, and the chapter presidents (or their designees).

(iii) Annual or Special Meetings of Members. At all meetings of the membership of the society, voting is restricted to the state president, the immediate former state president, each elected state officer, and the elected delegates from each chapter as calculated per Bylaw 8, Section 1(b).

(iv) Amendments of Bylaws. At annual or board of managers meetings properly noticed, proposed amendments to the bylaws may be voted upon with such voting restricted to one vote for each chapter president (or his designee). Passage of the proposed amendment requires at least a two-thirds vote of the chapters

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present and voting at the meeting.

(v) Amendments of Articles of Incorporation. At annual or board of managers meetings properly noticed, proposed amendments to the Articles of Incorporation may be voted upon with such voting restricted to one vote for each chapter president (or his designee). Passage of the proposed amendment requires at least a two-thirds vote of the chapters present and voting at the meeting.

(c) Voting by Ballot—Voting by ballot shall be conducted in accordance with the most recent edition of Robert's Rules of Order, Newly Revised. All ballots will be distributed only to eligible voters by three tellers appointed for that purpose by the presiding officer.

(i) After all qualified voters have cast their ballot, the tellers will retire to count the ballots. The chief teller will certify the results in a written report including the total number of ballots cast,

the number of votes received by each candidate, and the number of ballots disqualified and the reasons therefore.

(ii) Upon returning to the room, the chief teller will be recognized by the presiding officer. After reading his report, the chief teller will give his report and the ballots to the presiding officer. The presiding officer will again read the report of the chief teller and then announce the winner of the election. In the event of a tie the process is repeated. In the event a motion for a recount is passed by the majority of the delegates, the presiding officer may turn the ballots over to another group of tellers to recount the ballots and again report the results to the presiding officer.

## Section 5—NATIONAL CONGRESS

The California delegate at large and the membership delegates and alternates to the annual congress, or delegates to any special congress, of NSSAR shall be appointed by the president to the full extent allowed in NSSAR Bylaw No. 20.

## Bylaw No. 9 THE INVESTED FUNDS

Section 1 This society shall maintain a permanent fund, to insure the stability and perpetuity of this society. Administration and management of the permanent fund shall be the responsibility of the trustees of the invested funds, as provided in bylaw No. 4, section 12.

(a) The permanent fund shall comprise all moneys or property, real or personal, which may accrue to this society by donation, gift, devise,

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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.

(b) The annual earnings (defined as income, dividends, realized and unrealized gains) 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.

Section 2 This society shall maintain an education fund in furtherance of its educational purposes and youth programs. Administration and management of the education fund shall be the responsibility of the trustees of the invested funds, as provided in bylaw No. 4, section 12.

(a) The education 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 education fund or solely for educational purposes.

(b) The principal and income from this fund shall be distributed by the board exclusively for educational purposes.

Section 3 This society shall maintain a congress fund to meet the obligations of a host society whenever the Society hosts the Annual Congress of the Sons of the American Revolution. Administration and management of the congress fund shall be the responsibility of the trustees of the invested funds, as provided in bylaw No. 4, section 12.

(a) 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.

(b) 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.

Section 4 This society shall maintain an unallocated fund 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. Administration and management of the unallocated fund shall be the responsibility of the trustees of the invested funds, as provided in bylaw No. 4, section 12.

(a) The unallocated fund shall comprise all the general funds of the - 18 -

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society not allocated to a restricted fund nor needed for the current expenses of the society.

(b) 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.

Section 5 This society shall maintain a life membership fund to maintain the life memberships purchased by regular members of this society. Administration and management of the life membership fund shall be the responsibility of the trustees of the invested funds, as provided in bylaw No. 4, section 12.

(a) There are three classes of CASSAR Life membership.

(1) For CASSAR members purchasing a CASSAR Life Membership, they must have already obtained a NSSAR Life Membership. The CASSAR plan will only pay their CASSAR and California chapter dues (not to exceed (\$10.00) ten dollars), as provided in bylaw No, 7, section 6.

(2) For CASSAR members who obtained a CASSAR Life Membership prior to April 12, 2014, the plan will pay their NSSAR, CASSAR and chapter dues (not to exceed (\$10.00) ten dollars), as provided in bylaw No, 7, section 6.

(3) For non-CASSAR members who obtain a CASSAR Life Membership, the plan will only pay their CASSAR and California chapter dues (not to exceed (\$10.00) ten dollars), as provided in bylaw No, 7, section 6.

(b) The life membership fund shall comprise all moneys that have been paid or will be paid to purchase life memberships.

(c) 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.

## Bylaw No. 10 THE LADIES AUXILIARY

To further the work of this society, women of good repute in the community who are related to SAR members in good standing shall be encouraged and assisted by the society in the establishment and operation of an independent organization to be named the Ladies' Auxiliary of the California Society of the Sons of the American Revolution.

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## HISTORY OF BYLAW AMENDMENTS

1. Change 1 dated April 8, 1989, amended Bylaw 3, § 1; Bylaw 7, § 5 & § 8.
2. Change 2 dated April 28, 1990, amended Bylaw 2, § 6; Bylaw 4, § 13; Bylaw 4, §§ 1a & 1b; & Bylaw 8, §

Id.

3. Change 3 dated May 11, 1991, amended Bylaw 4, §§ 1, 2 & 3; Bylaw 5, §§ 1, 2a, 2d & 2i; Bylaw 7, § 3.
4. Change 4 dated April 11, 1992, amended Bylaw 2, § 5 & added § 5a; Bylaw 4, §§ 12, 12a, 12b & 12c; added

Bylaw 11 with §§ 1 & 2.

5. Change 5 dated April 17, 1993, amended Bylaw 2, § 5; Bylaw 4, §§ 3a & 3c; Bylaw 5, §§ 2c, 2e & 2i.
6. Change 6 dated April 16, 1994, amended Bylaw 8, §§ 1a & 1b; Bylaw 10, § 3.
7. Change 7 dated April 15, 1995, amended Bylaw 5, adding § 4.
8. Change 8 dated April 20, 1996, amended Bylaw 2 by adding §§ 3a, 3b & 3c; Bylaw 7, § 3.
9. Change 9 dated April 24, 1999, amended Bylaw 5, § 1.
10. Change 10 dated April 8, 2000, amended Bylaw 2, adding §§ 7 & 8; Bylaw 4, § 1; amended Bylaw 4 by

adding § 12d, & amended Bylaw 7, § 3.

11. Change 11 dated April 5, 2003, amended Bylaw 5, § 1.
12. Change 12 dated April 3, 2004, amended Bylaw 7, § 6.
13. Change 13 dated November 6, 2004, amended Bylaw 4, §§ 4, 5, 6 & 12; Bylaw 5, § 1a; Bylaw 7; Bylaw 8,

§§ 4a, b, & c; & Bylaw 10, §§ 1, 2 & 3.

14. Change 14 dated November 8, 2008, amended Bylaw 5 by adding Bylaw 5a which provides for an

Executive Committee; amended § 6 of Bylaw 4 providing final CASSAR review of membership applications in case of disagreement on substantive completeness; amended Bylaw 8 § 2(a) shortening time of meeting notification.

15. Change 15 dated November 14, 2009, amended Bylaw 1, Bylaw 2, Sec. 2, Bylaw 4, Sec 12(d), Bylaw 5, Sec. 2(b), Bylaw 5a, Sec. 5, Bylaw 6, Bylaw 7, Sec. 1 & 3, Bylaw 8, Sec. 1, 1(c), 1(d), 1(e), & 1(g), Bylaw 10, Sec. 1, Bylaw 11, Sec. 2 eliminated, Bylaw 14 by adding Sec. 14.

16. Change 16 dated April 10, 2010, amended Bylaw 5, Sec. 5(a), Bylaw 7 by adding Sec. 9.

17. Change 17 dated November 6, 2010 amending Bylaw 4 by adding Sec. 12(f), Bylaw 5 by adding Sec. 2(j),



and Bylaw 10, Sec. 1.

18. Change 18 dated April 12, 2014 amending Bylaw 4, §1 renaming the trustees of the invested funds;

amending Bylaw 4, §12, §§ (a) & (b) defining the various invested funds, deleting (e) and renaming (f) to (e); amending Bylaw 7, §6 to require new life members to purchase NSSAR LM prior to joining the CASSAR LM program; amending Bylaw 9, §1, 2, 3, 4, 5 to define the various invested funds; and deleting Bylaw 10 and Bylaw 11 in their entirety.

19. Change 19 dated November 8, 2014 amending Bylaw 5, §2(j) to permit the CASSAR Chaplain to vote on the Ethics Committee, or name a replacement if he chooses not to vote; and amending Bylaw 7, §4 modify the rules for reinstatement from requiring BOM approval to ExCom approval.

20. Change 20 dated November 5, 2016 amending Bylaw 5, §1 adjusting nominating committee composition and chairman; amending Bylaw 5, §2(c) to expand duties of meetings & credentials committee; amending Bylaw 8, §3 & §3(a) to correct version of Robert's Rules of Order, and eliminating the provision for standing rules; amending Bylaw 8, §4(c) & §4(c)(ii) to correct version of Robert's Rules of Order, and removing balloting procedures we do not use; amending Bylaw 7, §1, §2 & §3 to correct NSSAR Bylaw number change from 19 to 22, and allow chapters extra time to submit annual reports; and amending Bylaw 7, §9 to allow non-continuous 50 years of dues, and exempt member from chapter dues.

21. Change 21 dated November 4, 2017 amending Bylaw 9, §1(b) defining annual earnings; eliminating Bylaw 2, §3(b) regarding chapter dual check signatures, and re-numbering 3(c) to 3(b); amending Bylaw 4, §5 requiring check request; amending Bylaw 2, §6 to require good repute and SAR members in good standing; amending Bylaw 5, §2(a) regarding composition of Budget and Planning Committee; amending Bylaw 5, §2(b) regarding composition of the Audit Committee; and amending Bylaw 8, §2(a) requiring two Board of Managers Meetings rather than three.

22. Change 22 dated April 21, 2018 amending Bylaw 8, §4(b)(iv) eliminating the need to call a special meeting by adding board of managers meeting; amending Bylaw 8, §4(b)(v) re-writing to bring articles of incorporation amendment procedures into conformity with bylaws amendment procedures; and amending Bylaw 8, §4(b)(ii-iii) to clarify the bylaw and bring it into conformity with subsection (i) regarding president's designees.

23. Change 23 dated April 27, 2019 amending Bylaw 8, §1(b) eliminating the "remaining fraction of twenty-five or more" in calculating the number of elected delegates, and setting the chapter membership total as the number of members on January 1 of the current year per the filed and approved Annual Reconciliation Report.

24. Change 24 dated April 27, 2019 amending Bylaw 8, §4(b)(iii) reconciling it with the calculation of elected delegates per the new Bylaw 8, §1(b).

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25. Change 25 dated April 18, 2020 moving Bylaw 2, §6 to Bylaw 10, and renumbering Bylaw 2 §§7-8 to §§6-7. The Ladies Auxiliary is not a chapter of CASSAR, and needs to have its own section.

26. Change 26 dated April 18, 2020 amending Bylaw 8, §1 to add subsection (i) to allow for electronic meetings of CASSAR.

27. Change 27 dated April 18, 2020 amending Bylaw 8, §1 to add subsection (j) to allow the Executive Committee by a 2/3 vote to change the time and date of any meeting in an emergency.

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# RESTATED ARTICLES OF INCORPORATION OF THE CALIFORNIA SOCIETY OF THE SONS OF THE AMERICAN REVOLUTION

The entire text of the articles of incorporation of THE CALIFORNIA SOCIETY OF THE SONS OF THE AMERICAN REVOLUTION, a California Nonprofit Public Benefit Corporation, as amended, are restated in accordance with the California Corporations Code to read as follows:

## INTRODUCTION

This corporation is a nonprofit public benefit corporation and is not organized for the private gain of any person. It is organized under the Nonprofit Public Benefit Law for public purposes.

## ARTICLE I

The name of this corporation shall be "The California Society of the Sons of the American Revolution."

## ARTICLE II

The purposes for which this corporation is formed and the powers which it shall have in addition to those enumerated under the provisions of the laws of the State of California, applicable thereto are as follows:

1. The purposes and objects of this Society are declared to be patriotic, historical and educational, and shall include those intended or designed to perpetuate the memory of the men who, by their services or sacrifices during the war of the American Revolution, achieved the independence of the American people; to unite and promote fellowship among their descendants; to inspire them and the community at large with a more profound reverence for the principles of the government founded by our forefathers; to encourage historical research in relation to the American Revolution; to acquire and preserve the records of the individual services of the patriots of the war, as well as documents, relics and landmarks; to mark the scenes of the American Revolution by appropriate memorials; to celebrate the anniversaries of the prominent events of the war and of the American Revolutionary period; to foster true patriotism; to maintain and extend the institutions of American freedom; and to carry out the purposes expressed in the preamble of the Constitution of our country and the injunctions of Washington in his farewell address to the American people.

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2. To own, acquire, hold and dispose of real and personal property to be used in the furtherance of the work of this corporation.

3. To contract, convey and take gifts, bequests and devises of real and personal property.

4. To have such powers to do and perform any and all acts necessary or advisable in conformity with the objects and purposes of this corporation, to the same extent and capacity as possessed by an actual person, whether enumerated in the laws of the State of California or in these articles, or which may be properly implied therefrom.

### ARTICLE III

The principal place of business of this corporation shall be in the State of California. The street address shall be as filed annually with the Secretary of State according to the provisions of Corporation Code 6210, operative January 1, 1980. Designation of the agent for the purpose of service of process and designation of the corporate officer responsible for filing the annual form prescribed by the Secretary of State shall be as provided in the Bylaws.

### ARTICLE IV

The governing board of this corporation shall be designated as the "Board of Managers" elected in accordance with the bylaws and shall consist of the elected officers of the society and an elected representative from each chapter of the society, as provided in the bylaws.

### ARTICLE V

There shall be no capital stock issued by this corporation. The members of this corporation shall consist of such persons as may be elected as such under provisions of the bylaws of this corporation, and shall be limited to male persons who are citizens of good repute in the community, who are the lineal descendants of an ancestor who, at the time of the last known service, demonstrated loyalty to and rendered active service in the cause of the American independence, either as an officer, soldier, seaman, marine, militiaman, or minute man in the armed forces of the Continental Congress, or of any of the several Colonies or States or as signer of the Declaration of Independence, or as a member of the Committee of Safety or Correspondence, or as a member of any Continental Provincial, or Colonial Congress or Legislature, as a foreign national of, but not limited to, France, Germany, Poland, Spain, Sweden, or Switzerland who rendered service in the cause of American Independence, or as a recognized patriot who performed actual service by overt acts or resistance to the authority of Great Britain, provided, however, that no person advocating the overthrow of the Government of the United States by use of force or violence shall be eligible for membership in the Society.

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Membership in this corporation shall not be transferable.

### ARTICLE VI

Actions of the membership of this corporation shall be taken at any regular or special meeting of the membership of this incorporation by voting delegates representing the membership and

chosen through and by local chapters or other subdivisions of this corporation. Every member of this corporation shall be entitled to one (1) vote in selecting such voting delegate or delegates from his chapter or other subdivision of this corporation. The bylaws shall provide for such voting delegates according to the requirements of Corporations Code Sections 5132 and 5133, operative January 1, 1980. No voting by proxy by or for any member of this corporation shall be permitted in any matter pertain to elections or other business of this corporation or of any local chapters or other subdivisions of the California Society of the Sons of the American Revolution.

#### ARTICLE VII

The property rights interests of the members shall at all times equal and are not assignable, either by voluntary act or by operation of law.

#### ARTICLE VIII

This corporation shall have perpetual existence.

#### ARTICLE IX

In accordance with the provisions of the California Corporations Code 9913, operative January 1, 1980, this corporation elects to be governed by all of the provisions of the California Nonprofit Public Benefit Corporation Law not otherwise applicable to this corporation under sections 9910-9927 of the Corporations Code.

#### ARTICLE X

Any member of this Society of whatever class or category who, by conduct disloyal to the ideals or prejudicial to the interests of the Sons of the American Revolution, shall have rendered himself unworthy of the membership therein, may be disciplined up to and including suspension, termination or expulsion, by a three-fifths vote of the Board of Managers provided that such recommendation is made after Hearing by a three-fifths vote of a Committee of Inquiry consisting of the most senior Past President able and willing to serve, the President, the most senior Vice President able and willing to serve, or, if two are of equal seniority in office, one of them chosen by lot, and two Presidents of Chapters other than those of the aforementioned three members of this Committee. The President shall appoint the committee members within these constraints.

A motion passed by the Board of Managers or by a Special or Annual Meeting of the Membership or an executive decision by a majority of the elected officers of this Society

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shall be authority to call a Committee of Inquiry. The accused shall be given fifteen days prior notice of the Hearing with the reasons therefore. He shall have an opportunity to be heard, orally

on in writing, by the Committee prior to their decision and not less than five days prior to any Board of Managers vote on the Committee's recommendation. Any member thus terminated or expelled shall from the date of such action by the Board of Managers cease to be a member of this Society or of any of its Chapters or to hold any rights or privileges connected with such membership including any interest in activities, properties or funds of the Society or any of its Chapters except that any member terminated or expelled according to the provisions above shall within sixty days of the date of such actions have the right to file with the Secretary of the Society an appeal for reversal of the decision by the next Annual or Special Meeting of the Membership and the decision of such meeting shall be final.

## ARTICLE XI

An appointed Bylaws Committee shall prepare the language for any proposed amendment to the Bylaws. The chapters of this society shall be given notice of such proposed amendment at least 30 days prior to a meeting of the membership at which the amendment shall be put to vote. An affirmative vote of two-thirds of the chapters of this society present and eligible to vote, represented by the chapter president or his designated alternate, shall be required for approval.

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The foregoing is a true and accurate restatement of the Articles of Incorporation endorsed for filing by the California Secretary of State on November 30, 1984, with assigned California Corporations Number C-0137972, and of the amendments thereto as follows: Amendment One dated July 19, 1986; Amendment Two dated April 2, 1988; and Amendment Three dated April 21, 2018. These articles and amendments thereto were duly approved by the board of managers and received the required vote of the chapters represented by the presidents (or their designees).

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# ***Section Six***

## ***2020 Meeting Minutes***

### ***Minutes:***

***145<sup>th</sup> Annual Meeting of the Membership-April 18, 2020 meeting***  
***145<sup>th</sup> Fall Board of Managers Meeting-November 14, 2020***

**CALIFORNIA SOCIETY  
SONS OF THE AMERICAN REVOLUTION  
145<sup>th</sup> FALL BOARD OF MANAGERS MEETING  
Zoom Meeting  
November 14, 2020**

The meeting was called to order by President Littlefield at 9:00AM (Pacific Time). The invocation was given by Chaplain Carlson. There was a moment of silence to honor the memory of James F. Blauer, our late CASSAR Historian. The Pledge of Allegiance was led by President Littlefield. The SAR Pledge was led by VP North Anderson. Secretary Schuster did the Roll Call (See **Exhibit A**), and President Littlefield declared a quorum. Due to the passing of our CASSAR Historian, President Littlefield appointed Stephen Renouf to take the minutes of the meeting. In compliance with the bylaws, voting at the meeting was limited to CASSAR Officers and a chapter president/designee for each chapter.

There was a motion by Registrar Stiles (seconded by Chaplain Carlson) to adopt the minutes as presented, which was approved by unanimous consent.

President Littlefield introduced the National Officers – President General Jack Manning, Vice President General James Fosdyck (Western District), Treasurer General Bruce Pickette, Genealogist General Jim Faulkinbury, Registrar General Doug Collins, Librarian General Tony Vets, Surgeon General Dr. Darryl Addington, Chaplain General Rev. David Felts, VPG Ernie Sutton (Mid-Atlantic District), VPG Allen Greenly (South Atlantic District), VPG Bobby Joe Seales (Southern District), VPG Chris Moberg (North Central District), VPG James Lindley (Pacific District), SAR Foundation Board Members John Dodd and Rev. Lou Carlson, NSSAR Trustee for California Derek Brown, NSSAR Trustee for Nevada Charles Smith, and NSSAR Trustee for Spain Stephen Renouf. John Dodd made a pitch for the SAR Foundation to encourage people to accelerate their 2021 annual giving to 2020 to complete the last part of the design phase for the SAR Education Center and Museum. The past state presidents were introduced – Marston Watson (1970-71), Robert Ebert (2006-07), Stephen Renouf (2008-09), Rev. Lou Carlson (2009-10), John Dodd (2011-12), Jim Faulkinbury (2014-15), Kent Gregory (2015-16), Jim Fosdyck (2017-18), Derek Brown (2018-19), and Robert Taylor (2019-20).

President Littlefield noted that Wreaths Across America Public Ceremonies have been cancelled due to social distancing restrictions, but there will be limited private ceremonies with no public invitations, to honor each of various branches of the military and the POWs/MIAs.

#### **AWARDS**

President Littlefield announced the National Awards that were presented for the cancelled National Congress in Richmond, Virginia. The California Society received the **Officer**

**Attendance Award** for having the president and national trustee present for the previous two leadership meetings and congress, the **Admiral Furlong Award** for States/chapters presenting SAR Flag Certificates, and the **Graham T. Smallwood, Jr. Award** for a State Society of 500 or more members with the best newsletter over 10 pages. The California Society Children of the American Revolution won the **Eleanor Smallwood Niebell Award** for State Society with the best newsletter. The California Society received **Certificates of Participation** for the **SAR Poster Contest** (the CASSAR winner from Folsom, CA, won third prize in the National Contest), the **SAR Brochure Contest**, **SAR Knight Essay Contest**, **SAR JROTC Contest**, and the **SAR Marian L. Brown Eagle Scout Award** for sponsoring the National SAR Eagle Scout Contest winner.

#### CANDIDATES FORUM

The California Society held a Candidates Forum for those running for National Office in 2021: **Dr. Darryl Addington** SAR Foundation Board, **Doug Collins** SAR Foundation Board, **John Dodd** Treasurer General, Kent Gregory spoke for **PG Joe Dooley** SAR Foundation Board, **Dwight Elam** Chaplain General (submitted a video), **Bob Fish** Genealogist General, **Allen Greenly** Registrar General, **James Lindley** Historian General, **Bruce Pickette** Secretary General, **Lee Popham** SAR Foundation Board, **Dr. Ernest Sutton** Surgeon General, and **Tony Vets** Registrar General.

President Littlefield declared a recess by unanimous consent at 10:12AM.

President Littlefield called the meeting back to order at 10:19AM. Candidates who were not CASSAR members were asked to leave the meeting so the California Society could discuss the candidates running for National office. Chaplain Carlson made a motion (seconded by President Designee Marston Watson of the San Francisco Chapter) to endorse all candidates who were running unopposed for election, which was approved by unanimous consent. Then, Invested Funds Trustee Gregory made a motion (seconded by Chaplain Carlson), to endorse Tony Vets in the contested race for Registrar General, which was approved by unanimous vote. Secretary Fred Schuster was directed to e-mail NSSAR Nominating Committee Chairman Warren Alter the CASSAR endorsements for national office: President General Davis Wright, Secretary General Bruce Pickette, Treasurer General John Dodd, Esq., Chancellor General Michael Elston, Genealogist General Robert Fish, Registrar General Tony Vets, Historian General James Lindley, Librarian General Fred Olive III, Surgeon General Ernest Sutton, Chaplain General Dwight Elam, Foundation Board Lee Popham, Foundation Board Douglas Collins, Foundation Board Joseph Dooley, and Foundation Board Darryl Addington.

#### SPEAKER

President Littlefield introduced **Hallie Wallace**, one of CASSAR's two Valley Forge Contest winners in 2020, who is a 5th grade teacher at Oak Chan Elementary School in Folsom, California. Hallie Wallace spoke about attending the first-ever virtual Valley Forge Program, and thanked the California Society for sponsoring her for the Valley Forge Program. President



Littlefield promised to send her an **SAR Certificate of Appreciation** for her presentation to our membership.

#### OFFICER/COMMITTEE REPORTS

President Littlefield requested officer reports that were in not in “The Book.” **Chancellor General Dodd** reported that he received a query regarding the California Society requesting the California DMV issue specialty SAR license plates. He looked into the procedure and found that it was not feasible; SAR license plate holders are a better alternative. **Executive VP Stephens** requested submissions for the *California Compatriot* for the December 31, 2020 deadline, and noted that the CASSAR Annual Meeting is being planned for April 15-18, 2021 at the historic Mission Inn in Riverside, California. **Vice President South Klingler** requested chapters to e-mail him the names of great speakers that they have had at their meetings, and he will put the speaker’s contact information on the CASSAR website’s new Speakers Bureau Program section – with Zoom Meetings, geographical location of speakers is no longer an issue. **Surgeon Matt Bowdish** noted that he has two talks that he can give to chapters – one on “Medical History of George Washington,” and another on “DNA and Genealogy.” On the ongoing coronavirus pandemic, he recommended that people make good choices.

**Eagle Scout Chairman Bill Nay** offered to send a Zoom Meeting link to those interested in his slide presentation on the Law, Genealogy, and American Heritage Merit Badges of the Boy Scouts, and noted chapter Eagle Scout winners need to be submitted to CASSAR by December 31, 2020. **Valley Forge Chairman Bob Taylor** requested chapters to recommend quality teachers for the 2021 contest.

#### CHAPTER REPORTS

President Littlefield requested officer reports that were in not in “The Book.” **Immediate Past President Bob Taylor** noted that the **General George Patton Chapter** recently held its first in-person meeting since the coronavirus pandemic, and incorporated Zoom Meeting for those unable to attend in person. **President Phil Mitchell** of the **Orange County Chapter** thanked the state officers who attended the memorial for CASSAR Historian Jim Blauer at their chapter meeting. **President Designee Marston Watson** noted that the **San Francisco Chapter** has a young man running for chapter president in 2021 – Luke Dziurzynski – who is the CASSAR Compliance Committee Chairman. They have about 90 members, but are struggling to keep going due to only having a few active members. **President Bill Van Valkenburg** of the **Redwood Empire Chapter** noted that the chapter would be hosting its first Zoom Meeting (thanks to Bill Nay) on November 28, 2020, and they have ten new members to induct into the SAR. **President Dick Ferman** of the **Silicon Valley Chapter**, who is an Enrolled Agent, noted that the IRS is waiving the Required Minimum Distribution from retirement plans in 2020 due to the coronavirus pandemic.

President Littlefield declared a recess by unanimous consent at 11:03AM.

## SPECIAL REPORTS

President Littlefield called the meeting back to order at 11:13AM. **Executive VP Stephens** delivered the **Audit Committee Report**. The committee consisted of Executive VP Stephens (chairman), VP North Anderson, VP South Klingler, Bill Nay from the North, Curtis Porter from the South, and President Littlefield. The audit period was April 1, 2020 through October 31, 2020, and was conducted electronically – the committee requested backup for some checks and deposits, and Treasurer Ferris provided them all, which were found to be in good order.

**Trustees Renouf, Dodd and Gregory** delivered the **Invested Funds Trustees Report**. The report was “in the Book,” and showed for the 12-month period ending September 30, 2020, that the invested funds accounts had an increase of a little over \$8,000. For calendar year 2020 through October 31, 2020, after the roller coaster year with coronavirus and elections, there was a net unrealized gain of over \$4,000. The trustees will have a call with the broker at Morgan Stanley for a strategy call about when to implement the approved increase in risk tolerance for the various CASSAR funds after the uncertainty over US Senate control is determined in early January 2021.

**Past CASSAR President Derek Brown** announced the **CASSAR Nominating Committee Report**: President Brian Stephens (not standing for election, president-elect), Executive VP Craig Anderson, Vice President South Jim Klingler, Vice President North Bill Van Valkenburg, Vice President Membership Doug Bergtholdt (not standing for election, two-year term), Secretary Fred Schuster, Treasurer John Ferris, Registrar Owen Stiles, Chancellor John Dodd, Esq., Genealogist Terry Briggs, Historian Scott Knecht, Chaplain Rt. Rev. Lou Carlson, Surgeon Dr. Matthew Bowdish, Investment Funds Trustee John Dodd (for 3-year term), Investment Funds Trustee Dr. Kent Gregory (not standing for election, 3-year term), Investment Funds Trustee Stephen Renouf (not standing for election, 3-year term), and Immediate Past President Donald Littlefield (not standing for election). The California Society is nominating Robert Taylor for NSSAR Trustee for California, and Brian Stephens for NSSAR Alternate Trustee for California.

**President Littlefield** reported on the **CASSAR Best Chapter Contest**: only seven of the twenty-four chapters participated in 2019, and there was virtually no competition. The two reasons most often given for chapters who are not participating are: lack of resources (no one to report for the chapter), and no path to win the contest (no return on investment for the chapter). Efforts to get more participation have failed, and after careful review by the CASSAR Executive Committee, they do not see any viable options to save the Best Chapter Contest. President Littlefield suspended the contest as of January 1, 2021, by unanimous consent, and stated that if someone took on the project and came up with a viable solution, it could be readdressed at a future meeting.

**John Dodd** presented a proposal to amend the SAR Handbook to require that “**awards for National Officers of Organizations by State Society or Chapter must be approved by the President General. Award requests will be submitted to the Executive Director at least 30 days prior to the ceremony so that the President General can approve and the proper certificate and engraving can be accomplished.**” This would specifically apply to the **SAR Daughters of Liberty Medal, SAR Silver Good Citizenship Medal, SAR Bronze Good Citizenship Medal, SAR Medal of Appreciation, and Martha Washington Medal.** Awards of a national scope should be approved by the National Society rather than by a state or chapter. Chaplain Carlson made a motion (seconded by President Rob Dickey of the Riverside Chapter) to have the California Society propose this amendment to the SAR Handbook to the NSSAR Medals & Awards Committee for consideration, which was approved.

President Littlefield declared a recess by unanimous consent at 11:56AM.

President Littlefield called the meeting back to order at 12:03PM. **Genealogist Terry Briggs** reported that he was looking for volunteers to enter CASSAR application lineages (since 1984) into the NSSAR Patriot Research System (PRS) database – California has 4,300 entered, and still has 3,600 to go. Chapters should encourage their members to volunteer – the data entry can be done at home on a computer, and the hours count towards earning the SAR Lafayette Volunteer Medal. **VP South Jim Klingler** reported on the **NSSAR National Dues Task Force**, which has four test markets – California (large state), Missouri (medium state), Delaware (small state), and Spain (international society). This is an effort to eliminate the need for the annual reconciliation, and states/chapters can run membership reports from the NSSAR system. The goal is to have California have the 2022 dues collected by the National Society.

**Executive VP Stephens** reported for the **Budget Committee**, consisting of Stephens (chairman), Invested Funds Trustee Renouf, VP South Klingler, and Treasurer Ferris. He presented the proposed **2021 CASSAR Budget (Exhibit B)**. Stephens reviewed the changes from the previous budget. VP South Klingler made a motion (seconded by President Phil Mitchell of the Orange County Chapter), to adopt the budget as presented, which was unanimously approved.

#### PUBLIC SERVICE AWARDS

President Littlefield presented the Public Service Awards – he presented the **SAR EMS Commendation Medal** to **Jason Bond**, the Operations Manager for AMR Napa County, for his service during the LNU Lightning Complex Fire and the Glass Complex Fire. He also recognized team members **JohnRey Hassan**, EMT-P, and **Brieanna Jones**, EMT. President Littlefield presented the **SAR Silver Good Citizenship Medal** to **Ron Collier**, who is a volunteer fire fighter, and a participant in the “Missing in America” Program (MIAP) program, which finds unclaimed remains of American service men and women to ensure they receive a full military funeral in interment in a State or National Cemetery.

## SOCIETY AWARDS

President Littlefield and Color Guard Commander Kramer presented the **SAR Silver Roger Sherman Medal** to **Larry Wood** of the Orange County Chapter, who served as Color Guard Adjutant-South.

President Littlefield presented the **SAR Silver Roger Sherman Medal** to **VP North Craig Anderson**, and to **Chancellor John Dodd** for their service to the state society. For the Spring Annual Meeting, he presented the **SAR Bronze Roger Sherman Medal** to **Del Hanson, Michael Hull**, and **Russ Kaiser** for their service on the public service awards, and to **David Paulsen** and **George Brinley** for their work on the swag bags. He presented the **SAR Certificate of Appreciation** to **Phil Noble, Scott Brooks, Mark Mozdy, Russ Kaiser, David Cofer, Carl Ahlberg, Roy Adkins**, and **David Beach** for their work on the meeting. President Littlefield presented the **SAR Martha Washington Medal** to **Teresa Booth** of Helms Briscoe for her negotiations with the Murieta Inn & Spa, and the Doubletree by Hilton Sonoma Wine Country. For the Fall Board of Managers Meeting, he presented the **SAR Bronze Roger Sherman Medal** to **Bill Van Valkenburg** and to **Bill Nay** for hotel planning, to **Fred Schuster** for his work on the Best Chapter Contest, and to **Greg Hill** for his many web services to the society. Finally, President Littlefield presented the **SAR State Meritorious Service Medal** to **Jim Faulkinbury** for his assistance proving lineages for pended applications, and to **Terry Briggs** for assisting with pended applications and managing the data entry for CASSAR applications into the SAR Patriot Research System (PRS).

President Littlefield declared a recess by unanimous consent at 12:53PM.

## WESTERN DISTRICT MEETING

Vice President General Jim Fosdyck convened a meeting of the Western District at 12:54PM, with the assistance of Western District Secretary, Charles Smith. President Donald Littlefield of the California Society and President Michael Fitzpatrick of the Nevada Society were in attendance. Terry Briggs noted that the Nevada and Hawaii societies have all their application lineages entered into the NSSAR Patriot Research System. VPG Fosdyck noted the passing of Brian Worcester, a past Vice President General from the Nevada Society, and an active member at the National level, on September 1, 2020. VPG Fosdyck also noted that Charles Smith was nominated for Vice President General of the Western District at the upcoming SAR Annual Congress in Renton, Washington, in July 2021. The Western District endorsed the same National officer candidates as were endorsed by the California Society by unanimous consent. President Fitzpatrick of the Nevada Society stated that the Nevada Society was trying to enhance their annual meetings with quality speakers, as well as participate in education and community involvement. Tentatively, they are scheduling a Spring Meeting in Reno, Nevada, if they are able to hold the meeting in-person. VPG Fosdyck noted that the Western District has a

new, revamped website by Greg Hill at [www.WDSAR.org](http://www.WDSAR.org). Vice President General Fosdyck adjourned the meeting of the Western District by unanimous consent at 1:00PM.

#### RESUME BOARD OF MANAGERS MEETING

President Littlefield called the CASSAR Board of Managers Meeting back to order at 1:00PM, and noted that we had about 75 participants in the Zoom Meeting. The Benediction was given by Chaplain Lou Carlson. The recessional was led by Jim Klingler. President Littlefield adjourned the meeting by unanimous consent at 1:03PM (Pacific Time).

Respectfully submitted

Stephen Renouf,  
Acting Historian

**EXHIBIT A**  
**CASSAR BOM**  
Zoom Meeting Attendees  
November 14, 2020

**OFFICERS (15 of 16)**

Donald Littlefield	<b>President</b>	John Dodd, Esq,	<b>Chancellor</b>
Brian Stephens	<b>Executive VP</b>	Terry Briggs	<b>Genealogist</b>
Craig Anderson	<b>VP North</b>	Rev. Lou Carlson	<b>Chaplain</b>
Jim Klingler	<b>VP South</b>	Dr. Matt Bowdish	<b>Surgeon</b>
Doug Bergtholdt	<b>VP Membership</b>	Dr. Kent Gregory	<b>Inv. Funds Trustee</b>
Fred Schuster	<b>Secretary</b>	Stephen Renouf	<b>Inv. Funds Trustee</b>
John Ferris	<b>Treasurer</b>	Robert Taylor	<b>Imm. Past President</b>
Owen Stiles	<b>Registrar</b>		

**CHAPTER PRESIDENTS/DESIGNEES (17 of 24)**

Mel Howell	<b>Delta</b>	Bill Peters	<b>San Diego</b>
Ron Barker	<b>Gold Country</b>	Marston Watson*	<b>San Francisco</b>
Brandon Vallardi	<b>Harbor</b>	Jeff Weinbender*	<b>Santa Barbara</b>
Mike Muetz	<b>Mother Lode</b>	Richard Ferman	<b>Silicon Valley</b>
Phil Mitchell	<b>Orange County</b>	Troy Munday*	<b>Sons of Liberty</b>
Shawn Price*	<b>Redlands</b>	Scott Whitman	<b>South Coast</b>
Bill van Valkenburg	<b>Redwood Empire</b>	Greg Owens	<b>Thomas Jefferson</b>
Rob Dickey	<b>Riverside</b>	John Hendon	<b>Yosemite</b>
Del Hanson	<b>Sacramento</b>		

**MEMBERS (24)**

Derek Brown	<b>NSSAR Trustee-CA</b>	Terry Morford	<b>Thomas Jefferson</b>
Robert Ebert	<b>San Francisco</b>	Mark Mozdy	<b>Sacramento</b>
Jim Faulkinbury	<b>Genealogist General</b>	Bill Nay	<b>Redwood Empire</b>
Jim Fosdyck	<b>VPG-Western</b>	Kevin Oatley	<b>General Patton</b>
Dave Gilliard	<b>Gold Country</b>	Jon Russell	<b>Yosemite</b>
Mike Heckenlaible	<b>Riverside</b>	Jeff Shephard	<b>Kern</b>
Phil Hinshaw	<b>San Diego</b>	Richard Small	<b>Coachella Valley</b>
Greg Hill	<b>Gold Country</b>	Roy Smith	<b>Yosemite</b>
Russ Kaiser	<b>Sacramento</b>	Phil Stage	<b>Thomas Jefferson</b>
Barry Key	<b>San Diego</b>	Harry Stover	<b>Redwood Empire</b>
Mark Kramer	<b>Color Guard Cmdr</b>	Mark Torres	<b>Orange County</b>
Michael Montgomery	<b>Silicon Valley</b>	Bradford Welsh	<b>Orange County</b>

**EXHIBIT A**  
**CASSAR BOM**  
**Zoom Meeting Attendees**  
**November 14, 2020**

**GUESTS (14)**

Darryl Addington	<b>Surgeon General</b>	Chris Moberg	<b>VPG-North Central</b>
Doug Collins	<b>Registrar General</b>	Bruce Pickette	<b>Treasurer General</b>
Michael Fitzpatrick	<b>Nevada Society</b>	Lee Popham	<b>Florida Society</b>
Allen Greenly	<b>VPG-South Atlantic</b>	Bobbie Joe Seales	<b>VPG-Southern</b>
James Lindley	<b>Washington Society</b>	Charles Smith	<b>Nevada Society</b>
Jack Manning	<b>President General</b>	Dr. Ernest Sutton	<b>VPG-Mid Atlantic</b>
Eugene Melvin	<b>Oregon Society</b>	Tony Vets	<b>Librarian General</b>

EXHIBIT B  
CALIFORNIA SOCIETY, SAR  
2021 BUDGET PROPOSAL

	2020 BUDGET TOTAL	2021 OPERATING FUNDS	2021 PASS THRU FUNDS	FY 2021 BUDGET PROPOSAL CHANGES FROM 2020
<b>REVENUE</b>				
I-01A · Annual CASSAR Dues Received	25,000	23,860		23,860 Updated with current membership information
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 · LM Accounts Receivable	700		700	700
I-17 · Income from Other Sources	0	140		140
I-18 · TRNSF FM EDUCATION FND	2,500		2,500	2,500
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>
<b>EXPENSES</b>				
<b>Officer Expenses</b>				
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 Exec. Cmte Expenses</b>	<b>5,100</b>	<b>5,100</b>	<b>0</b>	<b>5,100</b>
<b>Committee Expenses</b>				
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
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>



EXHIBIT B  
CALIFORNIA SOCIETY, SAR  
2021 BUDGET PROPOSAL

**Program Expenses**

C-45 - California Compatriot Exp	1,500	1,600	1,600	\$100 added for increased formatting costs
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 - Storage Rent & Supplies	750	750		750
E-35 - Cloud Storage Fees	200	200		200
E-40 - Other CASSAR Expenses	2,000	2,000		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>

**TOTAL EXPENSES**

**95,360      35,885      56,625      92,510**

**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>

**NET SURPLUS/(DEFICIT)**

**275      863      0      863**

**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

## EXHIBIT C

### **145<sup>th</sup> Board of Managers California Society Sons of the American Revolution November 14, 2020**

#### **Agenda**

- Call to Order President Donald B Littlefield
- Invocation Chaplain Rt. Rev Louis V. Carlson
- Moment of Silence for Jim Blauer, et al
- Pledge of Allegiance to the Flag Brian Stephens, Exec. Vice President
- SAR Pledge Craig Anderson, Vice President North
- Credentials Committee Report/ Roll Call / Quorum Brian Stephens / Fred Schuster
- Approval of Minutes – Annual Meeting 18 Apr 2020 President Donald B. Littlefield
- Introductions of NSSAR VIPs and Special Guests President Donald B. Littlefield
- Introduction of Past Presidents CASSAR President Donald B. Littlefield
- 9:30 AM: National Officer Candidate Forum

10:00 AM – [ 5 minute BREAK ]

- Reports (all detailed reports should be in the book, only critical items should be verbalized) 3-minute limit (Speakers must request time on the agenda by November 8th)
  - Elected Officer Reports California Society
  - Wreaths Across America – Official Ceremonies at VA Cemeteries Cancelled
  - Chapter Reports – California Society
  - Audit Committee Report Chairman Brian Stephens
  - 2020 YTD Investments Update Chairman Stephen Renouf
  - Nominating Committee Report Chairman Derek Brown
  - Best Chapter Contest discussion and motions
    - Decision and Motion to eliminate the California Society Best Chapter Contest
    - If the motion does not pass, then we will need a Cmte to develop plan, chairman, budget
  - Other Committee or Old Business Reports
- [ 10:30 am ] Valley Forge Teacher – Hallie Wallace, Oak Chan Elementary, Folsom, CA

11:00 AM – [ 5 minute BREAK ]

#### **New Business**

- Medals and Awards Proposal Stephen Renouf & John Dodd
- Patriot Research System Volunteers Terry Briggs
- NSSAR Dues Collection Update Jim Klingler
- 2021 Budget Committee Report Chairman Brian Stephens
- Public Service Awards (Redwood Empire Chapter) Bill Van Valkenburg / Bill Nay
- BOM Meeting Awards President Donald B Littlefield
- Color Guard Awards Color Guard Commander Mark Kramer
- Adjourn 145<sup>th</sup> California Society Board of Managers Meeting
- Convene Western District Meeting – Vice President General Western District Jim Fosdyck
- Benediction Chaplain Rev. Louis V. Carlson
- Recessional Vice President South Jim Klingler

12:00 PM – [ ADJOURN ]

145<sup>th</sup> ANNUAL MEETING OF THE MEMBERSHIP  
CALIFORNIA SOCIETY  
SONS OF THE AMERICAN REVOLUTION  
Zoom Meeting  
April 18, 2020

The meeting was opened by President Taylor at 9am. The invocation was given by Chaplain Louis V. Carlson, Jr. The Pledge of Allegiance was led by Don Littlefield. The SAR Pledge was led by Craig Anderson.

Secretary Fred Schuster did the Roll Call (**Exhibit A**). A quorum was established. Terry Briggs chose to act as a delegate from his chapter rather than as Genealogist, voting as chapter president. He will vote as Chapter President.

Noted guests included; VPG Fosdyck, Genealogist General Jim Faulkinbury, National Trustee for CA Derek Brown, National Trustee for NV Charles Smith, Former President General Joseph W. Dooley and Executive Committee member John Dodd.

In order to explicitly authorize this Annual Meeting via electronic means, there were two bylaw proposal votes. Proposal #2 (**Exhibit B**) adds a new subsection (i) to Bylaw 8, Section 1, which authorizes state meetings to be conducted via the internet, and establishes the rules governing electronic meetings. This motion was passed unanimously. Proposal #3 (**Exhibit C**) adds a new subsection (j) to Bylaw 8, Section 1, which authorizes the Executive Committee to change the time and place of a state meeting in an emergency. This motion was passed unanimously.

The remaining of the By-Law will be discussed later.

Minutes of the April 2019 meeting were taken up. It was moved by Douglas Bergtholdt to approve. This was seconded by Don Littlefield. There was no discussion, the motion passed. The minutes for the Fall Board of Managers Meeting of November 2019 were asked for approval. Derek Brown moved to approve. This was seconded by Don Littlefield. The motion passed.

“President Taylor addressed the membership by noting how we have entered a new era with technology based meetings. He noted the illness of Oliver Everett and asked for prayers for him and his wife. His illness is not virus related, having experienced several strokes. President Taylor thanked all for their support during his term as state president. He noted this pandemic has been a challenge to the society. There were three initiatives he tried to complete during his term. 1) a new membership booklet. 2) He wanted to define the chapter areas. And 3) have a FAQs section added to the state website. Again he thanked all for their support during his term as President.

## **OFFICER REPORTS**

**President** Robert Taylor—In the book, noting he presented an additional Sea Cadet Award.

**Executive Vice-President** Donald Littlefield—In the Book.

**Past President/National Trustee** Derek Brown—Report is in the book. He noted that Sarah Dennison is leaving the society. The Bermuda Trip has been cancelled. They are continuing with plans for the Richmond Congress as well as contingency plans if it has to be cancelled.

**Vice-President North** Craig Anderson—In the book.

**Vice-President South** Brian Stephens—In the book.

**Vice-President Membership** Douglas Bergtholdt—In the Book.

**Secretary Fred Schuster**—In the Book. Thanked David Grinnell and others for their help and assistance this last year.

**Treasurer Jim Klingler**—In the Book.

**Registrar Owen Stiles**—In the Book.

**Chancellor John Dodd**—Not in the book. He did report, he was working on the issues with the meeting.

**Genealogist Terry Briggs**—Not in the book. Was emailed out (**Exhibit D**) Jim Faulkinbury as Genealogist General noted that work was being done on applications. Some are being done at home and some are worked on in the office. The digitalization of applications has been completed on 13 Volumes by Derek Kruger. He hopes to get funds for the on-line applications. Applications can be sent in at this time. They are working on them, albeit at a slower pace due to the situation.

**Historian Jim Blauer** had no report for the book. His reports are the minutes from each meeting. Both the April and November 2019 meeting minutes have been approved by the membership, and can be found on the state website.

**Chaplain Lou Carlson**—Report not in the book.

**Surgeon Matthew Bowdish**—Though it was reported not in the book, Historian Jim Blauer found it under Committees (**Exhibit E**) and not under Officer Reports.

**Investment Funds Trustee Stephen Renouf** noted the Trustee's Report is on pages 87-93 in the Book. He noted an almost \$20,000 decrease (for the 12-months through 2/29/2020) due to the \$17k SAR Foundation Donation and the Stock Market correction in February 2020. The trustees recommended a change in risk factor (1-low, 5-high) to make all funds risk factor 4 (except the unallocated fund, which would go to 3). This is recommended in an effort to increase returns on our investments, which are mostly long-term investments. The Morgan Stanley advisor would have the discretion to implement the change when he thinks it is most advantageous for us. It was moved by Don Littlefield and seconded by Rob Dickey that we do this. The motion passed with one nay.

Trustee John Dodd noted the need for higher returns.

Trustee Kent Gregory noted the change was needed as it will help when the Stock Market starts to climb back up.

## COMMITTEE REPORTS

**Color Guard**—Mark Kramer reported on the Color Guard Awards. They are as follows;

Very Large - Orange County

Large - General Patton

Medium Large - Harbor

Medium Small - Delta

Small - no entries

## SAR Color Guard Silver Medal Awards

Mark Torres - Orange County

Matthew Noell - Orange County

Larry Hansen - Orange County

Brian Merrel - Harbor

Colorguardsman of the year- Larry Hansen

**Budget**—Don Littlefield reported it is in the book.

**By-Laws**—John Dodd reported we would do the remainder later in the meeting.

**California Compatriot**—Don Littlefield reported they had done three issues and they are on the website.

**CAR Liaison**—Compatriot O'Neill reported it is not in the book.

**California Activity Contest**—Doug Bergtholdt reported there were 7 chapters that participated in the Contest. Winners were;

Small Chapter—Delta

Medium-Small Chapter—Redwood Empire

Medium Large—Kern

Large—Riverside

Very Large—Orange County

As the plaques from last year are still with the chapters, he will need to get them to place the names on them and get them to the appropriate chapters. Some may need new plaques as they have used up their space. Fred will work with Doug on the Activity Report. Doug noted his report is in the book. Tom Adams inquired about using some of the President General's Contest items in the California Activity Contest. The Executive Committee will have to consider any changes to the activity Contest. Suggestions should be made to a member of that committee. Fred Schuster is working with Doug on making the contest more appealing to more chapters. Therefore getting more participation from other chapters that are not currently doing the contest.

**Protocol**—Mark Kramer had nothing to report.

**Handbook Committee**—Steve Renouf had no report.

**DAR**—Brian Stephen's report is in the Book 32 Finders Forms were submitted in 2019. For 5 referrals that get approved by National they will receive the DAR Medal of Appreciation.

**Ethics**—Lou Carlson had no report.

**Information Technology**—Greg Hill will send his report to the secretary.

**Medals & Awards**—David Grinnell, report is not in the book.

**Nominating Committee**—Jim Fosdyck's report is not in the book.

**Congress**—John Dodd requested this committee be taken off the list.

**Public Relations**—No report

**Ancestors Research**—Ray Raser reported it is not in the book.

**Genealogist**—Terry Briggs had nothing to add.

**Spanish research**—Paul Garcia had no report.

**Flag Certificates**—Report is in the book. There were 13 chapters who issued certificates last year. Harbor Chapter led the way with 50 Certificates issued and Redwood Empire presented 35 Flag Certificates. There were 2 Flag retirement certificates issued. One was issued by the General George Washington Chapter and one by the General George S. Patton, Jr. Chapter. We issued enough certificates to receive the Furlong Award.

**Wreaths Across America**—Don Littlefield reported it was in the book,

**Compliance**—Chairman is ill, the report is not in the book. Report to be sent in.

**Public Service**—Brian Stephens reported it is in the book.

**George Washington Endowment Fund (GWEF)**—Jim Fosdyck reported (Exhibit F) we had 30 new members from California. Alabama had just 17.

**250<sup>th</sup> Anniversary Committee**—Lou Carlson reported he is working with the National Committee selecting celebrations for the chapters in 2021. He is using the Calendar created by Jim Blauer as a starting base.

## CHAPTER REPORTS

Secretary Fred Schuster reported he had received and placed in the book reports from the following chapters; Central Coast, Coachella, Eagle, George Patton, George Washington, Gold County, Harbor, Kern, Monterey Bay, Mother Lode, Orange County, Redding, Redlands, Redwood Empire, Riverside, Sacramento, Santa Barbara, Silicon Valley, San Diego, Sons of Liberty, South Coast, Thomas Jefferson and Yosemite. He received nothing from Delta or San Francisco. Bob Ebert reported that San Francisco is doing well. John Dodd encouraged chapters to include a financial report.

We recessed at 10:15am

We reconvened at 10:30am.

## YOUTH ACTIVITIES

There was no report from Chairman Dan McKelvie on the Youth Activities in 2019

**Americanism Poster Contest**—Dave Gilliard reported his report is not in the book, but will speak on it later.

**Eagle Scout**—Chairman Bill Nay's report is in the book. He reported we have 2 Robert E. Burt Awards and that Jim Blauer received the NOESA (NESA Outstanding Eagle Scout Award) for all the certificates he has done for the local Eagle Scouts in Orange County. These were from both SAR and Sons of Union Veterans of the Civil War. Bill plans to attend the Order of the Arrow Conference in August and help man the SAR booth.

**Knight Essay Contest**—Patrick Cecil had no report

**ROTC/JROTC**—Rob Dickey reported the recipient of the JROTC Enhancement Essay is Cadet SMSGT Megan Lange of Casa Roble Fundamental High School. Located in Orangevale, California. Sacramento SAR Chapter. She will become the recipient of our Enhancement Medal, Bar and Certificate with a \$1,000.00 scholarship check.

**Spirit of America**—Bob Taylor reported it is in the book.

**Valley Forge**—Bob Taylor reported it is in the book

**Brochure Contest**—Compatriot Kevin Tierney reported 53 Brochures were submitted.

**Oration Contest**—John Ferris' report is in the book. No entries.

**Sea Cadets**—Bill Nay's report is in the book. He has a proposal for later.

## OLD BUSINESS

**Audit Committee**—Jim Klingler was asked to comment on this. He noted that he was the one being audited and he was not on the committee. There was no report submitted by the committee.

**DAR Referrals**—The DAR Award was discussed. SAR Medals are given to DAR members for providing SAR applicants who are subsequently approved. There was a motion (**Exhibit G**) by Brian Stephens for CASSAR to additionally give a \$100 cash award to the DAR chapter that provides the highest number of approved SAR applications (if greater than 5), and added to the DAR liaison budget, effective 2020 calendar year. The motion was passed unanimously.

**Dues Collection**--Genealogist General Jim Faulkinbury gave an update on the CASSAR dues collection proposal. He said since NSSAR has its own plan, he is dropping the state proposal. CASSAR is a test group for the NSSAR program.

**CAR Request**--President Taylor said the CAR Liaison needed to request a check to be sent to the CAR for the year.

**Black Powder Insurance**--Color Guard Commander Mark Kramer reported on liability and black powder insurance. He said NSSAR now has a national safety procedure (covering insurance and training requirements), and he commended John Dodd for working behind the scenes to get it established. Commander Kramer said he would get the national policy posted to the state website.

## NEW BUSINESS

**By-Laws—Proposal #1**—Chancellor John Dodd presented Bylaws Proposal #1 (**Exhibit H**) to delete Bylaw 2, Section 6, which discusses the Ladies Auxiliary. He explained the Ladies Auxiliary is a separate legal entity that is not controlled by CASSAR, and it does not belong in the Bylaw regarding CASSAR chapters. There is potential legal liability for CASSAR if the Ladies Auxiliary decides to cancel their liability insurance. Some members thought we should recognize the Ladies Auxiliary in the CASSAR Bylaws, so a compromise amendment was offered to remove Section 6 from Bylaw 2, and create a new Bylaw 10 for the Ladies Auxiliary. The amendment to the original proposal was passed. The proposal as amended was then passed. Chancellor Dodd noted that the Ladies Auxiliary were short of funds for the liability insurance due to declining membership. He encouraged all CASSAR Compatriots to have their wives, daughters and other female relatives join the Ladies Auxiliary to support their vital work supporting CASSAR.

**Sea Cadet Award**—Bill Nay reported the committee met and approved the awarding a Sea Cadet of the Year Award to begin in 2021. It is a \$1,000 Award. This was seconded by Rob Dickey. Bill Nay requested a \$1700 increase in budget to handle award and any travel expenses needed to get the winner to our meeting to receive the award. John Dodd noted we need to make sure this award is consistent with the other Youth Awards we give out. Bill noted the \$1000 is consistent with the other awards. Treasurer Jim Klingler noted we give \$1970 to JROTC and Eagle winners, \$1770 to Essay and Oration winners and \$1200 to Poster and Brochure winners. It was also reported that we have \$1400 in a travel account set up in the budget for those that need financial assistance getting to and from the meeting to receive their award. The motion for \$1,000 was voted on and passed.

**California Compatriot** cost for printed copy. At the Fall Board of Managers meeting it was raised to \$45 as it would cost \$15.00 per copy to print and mail out. Afterwards it was determined that the cost would only be \$25.00 for the three issues. The Executive Board agreed to the reduction and it has to be voted on by the membership. It was moved (Did not recognize the voice and no name was given) and seconded. The motion to reduce the cost of printing and mailing three copies per year to \$25 passed. Jim Klingler has a list of those on printing list.

## NEW BUSINESS

**DAR** meal was discussed. The question arising is whether the \$250 is just to cover the State Regent's meal or whether it covers other items as well.

We recessed at 11:17am

We reconvened at 11:27am

**Reconciliation Reports** was discussed. Fred noted the information was placed in the California Compatriot. The biggest problem he noted exists with Dual Members. Some he does not have records of. The Junior Membership is understated as the state and national figures are very different. Don Littlefield noted this very big topic and we need to move on.

**Memorial Service**—Lou Carlson was asked if he was ready to do a Memorial Service. He replied he was not. He suggested we do it in the Fall. It was noted that CASSAR President Stan Henderson had passed away. An obituary is to be run in the Compatriot. His wife Linda passed away just a short time before he did. Information on both is to be sent to the California Compatriot. It was noted member Dale Ritter was 100 years old when he passed away around the same time as President Henderson. Chaplain Carlson noted he had 15 members on the list for the service that we will defer until the Fall Board of Managers Meeting.

## AWARDS

### Youth Awards

**Americanism Poster Contest**—David Gilliard reported he had 5 entries in this contest First Place went to Sacramento (Poster A) with a \$350 award. Second Place went to Gold Country (Poster D) with a \$250 award. Third Place went to Orange County (Poster B) with a \$150 award. Fourth Place went to Harbor (Poster C) with a \$100 award. Honorable Mention went to San Diego (Poster E) with a \$75 award. There are no ribbons this year as all the shops are closed down from the pandemic. Posters will be posted on the state website so members can view them.

**Brochure Contest**—Kevin Tierney reported they had 53 Brochures sent in by four chapters. Medallions and checks will be sent to the chapter Chairmen for presentation to the winners. First Place Orange County (Brochure D) receives \$400. Second Place Sacramento (Poster C) receives \$300. They sent in 33 brochures. Third Place Mother Lode (Brochure B) receives \$200. Fourth Place Gold Country (Brochure A) receives \$100.

**Knight Essay Contest**—Patrick Cecil was not available. Compatriot Perkins from the Sons of Liberty Chapter reported that their entry was the state winner. Anaida Haroutonian wrote her essay on “Building Blocks—Lights, Camera, Action”. There is a \$1000 award. They need the check to present to the winner. President Taylor will check with Patrick on the medallion presented from the state.

**Oration Contest**—John Ferris reported there were no entries this year.

**Eagle Scout Scholarship Contest**—Bill Nay reported that Michael McPhie from the Orange County Chapter entry was the state winner. He showed photos of Michael and of his receiving the chapter Award at the Orange County meeting. He noted the presenter in the chapter photo was Compatriot Hans Hunt who is one of this year’s Robert E. Burt Award recipients. Bill reported he has the check for \$1000 and is waiting to get the sculpture engraved. He is also waiting to hear on the Richmond Congress. He has a room and plans to attend the Youth Awards Luncheon if the Congress is held. An inquiry was made on the National Award. Bill noted that Eagle Scout Michael McPhie will receive \$10,000 from the SAR as the National Winner of this contest.

**ROTC/JROTC**—Rob Dickey reported they had four submittals but 2 were disqualified. There was only a 2 point difference between the Orange County and Sacramento entries. Sacramento took first place with Orange County second. Derek Brown will check with the Ladies Auxiliary on checks for the Youth winners.



**Robert E. Burt Scouting Volunteer Award**—Bill nay reported that Hans Hunt from Orange County and William Stewart Crew from Central Coast are two to receive this award this year. He noted the state is allowed to give out 4 per year so if there are any other SAR scouts out there, get their applications in and see if we can fill our quota for the year.

**Public Service Awards**—Don Littlefield reported there were four this year (**Exhibit I**). There were three heroism Awards and one Law Enforcement award. Dell Hanson announced that Deputy Brian Bell of the Sacramento County's Sheriff's Department, Officer Scott Farnsworth and Officer Chris Cobb of the West Sacramento Police Department received the Heroism Award. Detective Louis Cameron of the West Sacramento Police Department was presented with the Law Enforcement Commendation Medal & Certificate.

**Flag Certificates**— There were enough chapters and the state issuing Flag Certificates that we will receive the Furlong Award at Congress.

**Richard F. Locke Award** for highest percentage of growth 2018-2019. Small Chapter was Yosemite. Small to medium chapter there was no award. Medium to Large Chapter—Kern. Large Chapter--General George S. Patton, Jr. Very Large Chapter--Sacramento. There will be a check and certificate sent to each of the winning chapters.

**DAR Referral** winner is Linda Adams with 21 referrals for the Kern chapter.

**Best Chapter Activity Contest**—Doug Bergtholdt gave this report earlier. Just need to get the plaques to be labeled with the new winners for 2019 and get them to the winning chapters.

**Presidential Awards**—President Bob Taylor gave out the following awards (**Exhibit J**);

**Bronze Good Citizenship Award** went to Un Hui Yi Fosdyck.

**Lydia Darragh Award** went to Darian Taylor

**Daughters of Liberty Award** went to Anne Adams. Citation read:

**Anne-Doerte Epstude Adams**, wife of Tom Adams (Mother Lode Chapter), attended the 2008 Congress in Sacramento and then again in 2010 in Cleveland when she joined the National Ladies Auxiliary. Anne joined the California Ladies Auxiliary at the 2011 CASSAR Fall Meeting in San Diego. Since 2010, Anne attended every Congress except 2012 in Phoenix and 2018 in Houston because Tom was ill. That's a total of 8 Congresses Anne has attended. Anne participated in the Ladies activities at 7 National Leadership Conferences in Louisville. She also participated in the California Ladies activities at 12 CASSAR Meetings. That is a remarkable record and one that deserves high recognition by the CASSAR.

Over the eight years she has actively participated in SAR activities, Anne has knitted and donated half a dozen afghans, a dozen scarfs and maybe as many as 20 simple wrap-around fuzzy scarfs.

**Roger Sherman Silver Medal** went to Don Littlefield, Fred Schuster, Jim Klingler and Jim Fosdyck.

**Distinguish Service Medal** went to Kent Gregory.

**Patriot Medal** went to Dan McKelvie, Bill Nay and Ernest McCullough.

We recessed at 12:22 pm.

We reconvened at 12:30pm.

**On-Line Merit Badges**—Bill Nay spoke on his on-line classes for the scouts to earn the Genealogy(April 12) and American Heritage (April 26) Merit badges. These are power point programs for the scouts to learn from and filling the requirements in the Merit badge book. He noted that if these work out well he will do one on the Law Merit badge. These three Merit Badges are one of the items National takes a close look at when selecting the winner of the Eagle Scout Scholarship Contest.

**Congress Report**—John Dodd reported the Executive Committee meets every Friday. There will be an electronic Trustee Meeting on May 2<sup>nd</sup>. Registration for Congress begin mid-May. There is a \$290,000 investment in the hotel contract we have for the Congress. The Executive Committee will meet in early June to discuss options for conducting the Congress.

If we have the Congress it has been noted that Construction at the hotel is behind. Business will need to be done all in one day. This will include; nominations from the floor, Rules for Congress require nominees to speak, the election of officers, reports, and awards to be announced.

The Trustees Meeting will be a one day meeting in Louisville to determine if we are going to go ahead with the Congress. This will be in early June.

Secretary Fred Schuster needs a list of delegates so they can have their voting credentials for Congress. He will need this by June 12<sup>th</sup>. There are 32 spaces for our California society.

**Election of State Officers**—Taken from the nominating Committee report.

President—Don Littlefield

Executive Vice-President—Brian Stephens

Vice-President North--Craig Anderson

Vice-President South Jim Klingler

Vice-President Membership—Douglas Bergtholdt

Secretary—Fred Schuster

Treasurer—John Ferris

Registrar—Owen Stiles

Chancellor—John Dodd

Genealogist—Terry Briggs

Historian—Jim Blauer

Chaplain--Lou Carlson

Surgeon—Matthew Bowdish

Investment Fund Trustee—Stephen Renouf (2020-2023)

Note John Dodd and Kent Gregory are serving unexpired terms and are not up for reelection at this time.

National Trustee—Bob Taylor

Alternate National Trustee—Don Littlefield

Jim Fosdyck called for any **nominations** from the floor. Hearing none a vote was taken and the slate was **elected**.

Jim Fosdyck then **installed** all the above elected officers except the President.

Jim Faulkinbury then **installed** Don Littlefield as our new state President. Don noted he had received the gavel and his wife Mary Ann placed the ribbon around his neck.

**President Littlefield** gave his remarks. He said he would do his very best for benefit and longevity of the California Society. He recognized Tom Chilton of the Sacramento Chapter, who brought Don into the SAR in 2007, and served as his mentor. President Littlefield said he was looking forward to working with the great team of CASSAR Officers in 2020. He gave special thanks to VP North Craig Anderson for his outstanding support this past year and Chancellor John Dodd for his thoughtful guidance and counsel relating to The Murieta Inn cancellation and change in meeting format. He also thanked Secretary Fred Schuster for his patience and efforts to improve the secretary records. He said all officers, chairmen and active members are critical to the continued success of the California Society, and he pledged to do whatever it takes to keep them involved and supported. He will work on improving communication across the board. He

thanked the Sacramento Chapter members who were working on the cancelled meeting in Rancho Murieta. He closed by stating that he was looking forward to meeting in person with everyone in Rohnert Park at the Fall BOM. He said we are not out of the [COVID-19] woods yet and we may still have to navigate around obstacles in how we do business. If anyone needs anything, he said not to hesitate to contact him. Chaplain Lou Carlson thanked Don Littlefield for helping to solve the ethics issue at the Sacramento Chapter. He had no doubt that Don would be very successful despite the current Wuhan virus pandemic, and would do an amazing job as President. Chaplain Carlson said he was praying for President Littlefield and his CASSAR team. He hopes that we will be able to hold our **Fall Board of Managers meeting** in November (**Exhibit K**). It is currently scheduled for November 13-14 at the Double Tree Hilton Hotel Sonoma Wine Country in Rohnert Park, CA, Room rate will be \$139/night plus taxes and fees.

Brian Stephens spoke on the **146<sup>th</sup> Annual Membership Meeting** on April 15-18, 2021 Meeting at the Mission Inn in Riverside (**Exhibit L**). It will be \$159/night.

The Ladies Auxiliary drawing was held. It was won by Judy Shaw.  
The Meeting was recessed at 12:07pm.

#### WESTERN DISTRICT MEETING

The 130<sup>th</sup> Western District meeting was called to order by Vice-President General of the Western District Jim Fosdyck at 12:07pm. Charles Smith of the Nevada Society was in attendance, but had no comments for the meeting.

VPG Fosdyck noted he attended the Hawai'i State Meeting. They were also able to attend a Hawai'i DAR meeting. The website has been enhanced. This was thanks to the assistance from Greg Hill, Steve Renouf, Charles Smith, Don Hotchkiss (NV Society President) and Rob Moore (HI Society President). There are links to both the Nevada and Hawai'i sites. Stephen Renouf added a considerable amount of history with names and photos of the past VPGs of the district.

VPG Fosdyck gave out several awards in 2020. A certificate of Appreciation was given to Jim Blauer for his calligraphy work on certificates. Un Hui Yi (CA) received the Daughters of Liberty Medal & Certificate. The Distinguished Service Certificate went to Steve Renouf (CA). Meritorious Service Medal & Certificate went to Greg Hill (CA), Donald Hotchkiss, Jr. (NV), and Charles Smith (NV). The Silver Roger Sherman Medal and Certificate were presented to Lt. Col. M. Strauss Scantlin and Col. Robert "Rob" Moore. The SAR Medal of Appreciation (DAR) was presented to Janet Thompson (NV DAR) and Jane Mann (HI DAR). The Martha Washington Medal was presented to Phyllis Smith (NV) and Un Hui Yi (CA). The Lydia Darragh Medal & Certificate was presented to Un Hui Yi

It was announced that Charles Smith has been nominated as the next VPG of the Western District.

Bill Nay challenged the Western District to expand the Sea Cadet Program to Hawai'i and Nevada. Rob Dickey noted that they have a Sea Cadet program at Pearl Harbor in Hawai'i. Charles Smith reported they were already in the process of setting up the Sea Cadet Program at the Signers Chapter with a known candidate from the Las Vegas Sea Cadets.

The Meeting of the Western District was adjourned at 12:15pm

The CASSAR meeting was reconvened at 12:15PM  
The Benediction was given by Lou Carlson.  
The Recessional was led by Brian Stephens

The 145<sup>th</sup> Annual Membership Meeting of the California Society of the Sons of the American Revolution was adjourned at 12:20pm.

Respectfully Submitted  
November 13, 2020

James F. Blauer  
State Historian

On April 20, 2020, Immediate Past President Robert Taylor sent out his parting thoughts. See below;

I want to take a moment to express my thanks to all of you for bestowing your trust in me by electing me president of this society for 2019-2020! It has been the culmination of my fondest desires and expectations, and will leave me with many fond memories of wonderful events and compatriots. The reins of leadership are now in the hands of my eminently qualified successor, Don Littlefield, who will provide superior leadership for our Society. I want to thank those who have supported me through this year now past. First, I have been fortunate in being backed by an outstanding executive board, without whom I could not have functioned, and my heart-felt thanks goes to each one of you. My committee chairs have also performed well and with due-diligence, for which I am grateful. We were blessed to fill our Spanish Liaison slot, giving us a full board, and my thanks to VPG Western District Jim Fosdyck for providing me potential candidates as openings for this and other committees occurred! As always, our ladies of the Ladies Auxiliary have supported us well with the grace and positive attitudes only they can provide, and I thank them for their 150% support.

While the CASSAR 144<sup>th</sup> Spring meeting was a highlight, providing as it did my entrance to this position, the absolute highlight of the year was the national congress held in Costa Mesa this past July, being the epitome of perfection in many ways as so many have told me. My thanks to John Dodd, Steve Renouf, Kent Gregory and so many others who worked hard and diligently to make it the successful event it was.

Finally, I want to thank you, the rank-and-file of the Society for your continued efforts in supporting the aims of the Sons of the American Revolution. As you participate at the chapter level, as committee members or as color guardsmen, you publicly demonstrate your faith in the foundational principals upon which this nation was formed and commemorate the memory of your patriot ancestors in tangible ways! My desire and hope is that our society will continue to benefit by you and your efforts to immortalize our society's ideals and outreach!

Again, my sincere thanks to one and all!

Fondly,  
Robert Taylor

# ***Section Seven***

## ***Western District Reports***

### ***Reports:***

***Vice President Generals Report***

***Nevada State President Report***

***Minutes of the 65<sup>th</sup> Nevada Society Annual Meeting***

# Sons of the American Revolution

## Vice President General's Report Form (Jul 2020 - Sep 2020)

Vice President General's Name: James Clarence Fosdyck		
Mailing Address: 9772 William Dalton Way		
City: Garden Grove	State: CA	ZIP Code: 92841-3840
Telephone Number: 714 932-4097	E-Mail Address: jfosdyck@sbcglobal.net	
Filing Date: Feb 25, 2021	SAR District: Western	
<p>When attending chapter, state societies and district teleconferences I discussed the George Washington Endowment Fund, SAR Education Center and Museum and other issues relevant to the NSSAR and Western District of the SAR. Frequently I have been requested to install new chapter and state society officers. I also discussed the importance of retaining members and reinstating dropped members. A goal of every member should be recruit one new member or reinstate a dropped member. Remind dropped members that they spent a lot of time and money to become a member of the SAR.</p>		

Number of SAR District Meetings Attended:				
State-level Societies	President	Chapters	Meeting	City
California Society	Don Littlefield	Orange Co and Harbor	Independence Day celebration at Richard Nixon Library	Yorba Linda, CA
October 10, 2020	Phil Mitchell	Orange County	Regular Meeting	Fullerton, CA
November 7, 2020	Phil Mitchell	Orange County	Regular Meeting	Fullerton, CA
California Society	Don Littlefield	Zoom Meeting	Fall BOM (14 Nov 20)	
December 12, 2020	Phil Mitchell	Orange County	Zoom Meeting	
January 9, 2021	Phil Mitchell	Orange County	Zoom Meeting	
January 19, 2021	Rob Dickey	Riverside	Zoom Meeting	
February 13, 2021	Phil Mitchell	Orange County		Fullerton, CA

### Teleconferences:

NSSAR Special Trustee Mtg / PG Jack Manning / Jul 25, 2020  
 NSSAR Special Trustee Mtg / PG Jack Manning / Aug 29, 2020  
 NSSAR GWEF Mtg / Jim Maples / Sep 3, 2020  
 NSSAR Membership Mtg / Dr. Darryl Addington / Sep 5, 2020  
 NSSAR Congress Planning Mtg / Paul Callanan / Sep 10, 2020  
 NSSAR Color Guard Mtg / Lou Raborg / Sep 12, 2020  
 NSSAR Americanism Mtg / Lou Raborg / Sep 12, 2020  
 NSSAR Medals and Awards / Stephen Renouf / Sep 19, 2020  
 NSSAR Special Trustee Mtg / PG Jack Manning / Sep 26, 2020  
 NSSAR Teleconference / PG Jack Manning / Dec 5, 2020  
 NSSAR Medals & Awards Committee Zoom Meeting / Stephen Renouf / Dec 12, 2020  
 NSSAR Color Guard Committee Zoom Meeting / Lou Raborg / Feb 6, 2021  
 NSSAR Public Service & Heroism Zoom Meeting / Wayne Brown / February 12, 2021  
 NSSAR Congress Planning Committee Zoom Meeting / Paul Callanan / February 18, 2021  
 NSSAR Medals & Awards Committee Zoom Meeting / Stephen Renouf / February 20, 2021  
 NSSAR Membership Committee Zoom Meeting / Dr. D. Addington / February 25, 2021

## **Report and Recommendations**

Working as a team Western District VPG Jim Fosdyck, WD Secretary Charles Smith and WD Webmaster Greg Hill continue to update the Western District website to include district history with the names of former WD VPGs from 1890 until the present and photos of VPGs from 1994 until the present. Please view the Western District website at: [wdsar.org](http://wdsar.org).



## NEVADA SOCIETY SONS OF THE AMERICAN REVOLUTION

President's Report  
April 10, 2021

Fellow Compatriots;

Despite a very challenging past year which began with a Covid pandemic that continues to date, our SAR State Society managed to maintain operations in creative ways while keeping our members safe. The 2020 Annual Business Meeting was conducted virtually via Zoom teleconference, and this year's meeting is again being conducted digitally, given the continuing safety constraints for in-person group gatherings. Our best laid plans to hold the Annual Conference in Reno, Nevada, regrettably needed to be cancelled with the hope to reschedule sometime during May 2021. As conditions are beginning to improve with increased vaccine supplies becoming more plentiful, gatherings in person remain tenuous and uncertain. Accordingly, we have decided to postpone the 2021 Conference yet again until it can be safely rescheduled, hopefully in Spring 2022.

Efforts to enhance continuing education throughout our state communities remains a top priority. One such initiative is focussed on establishing guest speaker series events throughout the year regarding American history topics. Expect to hear more about plans and upcoming venues featuring these exciting events when specific scheduling details become available.

The Nevada Society sadly lost seven active members during the past year, and they will all be sorely missed: \*Leonard Charles Becker, \*Robert L. Crowell, \*William Guy Dimmitt, \*Robert Bruce Russell, \*John Curtis Ryland, \*James Allen Smith, \*Brian Irwin Worcester. Please pray for the souls of these wonderful compatriots who contributed so much to their Chapters and our SAR Society.

Best personal regards,

J. Michael Fitzpatrick  
President, NVSSAR

cc: Charles B. Smith V, Registrar / Vice President - South  
David F. Hess, Vice President - North  
Stephen Schroder, Secretary  
Al Conant, Treasurer

Nevada Society SAR  
President





**Minutes of**  
**The Nevada Society 65<sup>th</sup> Annual State Conference**  
**April 4, 2020**

The 65<sup>th</sup> Annual State Conference was scheduled to take place at the Atlantis Casino Resort in Reno Nevada on the 4<sup>th</sup> and 5<sup>th</sup> of April 2020. Despite many months of planning for this important event by the hard working Battle Born Patriot Chapter, the Corona Virus upset these plans and the Society was forced to cancel, or at the very least postpone the conference. Nevertheless, the needs of the Society demanded that at the very least Elections must be held and various business activities needed to be addressed. Therefore it was mutually decided to Teleconference on the 4<sup>th</sup> of April 2020 at 10:00 AM. These are the minutes of the Teleconference Business Meeting.

**Nevada Society Members On-Line**

Donald Hotchkiss, Al Conant, David Hess, Roger Linscott, Stephen Schroder,  
James McLane, Paul Hicks, Michael Fitzpatrick, Charles Smith V, David Smith, Bob Till  
Jim Farmer, Paul Bell, Jonathan Dickey, Gary Parriott, Brian Worcester, Bill Burton  
David Barnard, Richard Dalton, Charles "Chip" MacLeod, Robert Stoecklin

**Other Members On-Line**

Vice President General Western District James C. Fosdyck

**Guests On-Line**

Un Hui Yi Fosdyck

Patricia?

## Opening Remarks President Donald L Hotchkiss Jr.

Welcome to all, despite difficult times we are happy to be able to use technology to enable us to conduct this important task.

1. President Hotchkiss opened the meeting with a Prayer, and led the On-Line Attendees in the Pledge of Allegiance and then the SAR Opening Pledge.
2. President Hotchkiss next requested a motion to accept the minutes of the 64<sup>th</sup> Annual State Conference, which was held in Tonopah Nevada on April 13, 2019 (Attachment 1). President Emeritus Roger Linscott made the motion, Past Vice President General Western District Brian Worcester seconded and the motion passed.
3. President Hotchkiss next requested a motion to accept the Treasurers Report (Attachment 2), (which had been emailed to the membership along with other documents to be addressed later on at this meeting).  
President Emeritus Paul Hicks made the motion, Past Vice President General Western District Brian Worcester seconded and the motion passed.
4. Approval of the Paul Jones Memorial Scholarship Fund Bylaws Changes was to be addressed next. These Bylaws with changes are attached below (Attachment 3). President Hotchkiss asked for a motion to accept the changes as proposed. Past Vice President General Western District Brian Worcester made the motion and President Emeritus Paul Hicks seconded, it went to a vote and the motion was passed.
5. Awards and Recognition was the next item of business. President Hotchkiss announced the following awards and certificates:

<b><i>Award</i></b>	<b><i>Recipient</i></b>
Past President Pin	Donald L. Hotchkiss, Jr.
State Meritorious Service Medal	Donald L. Hotchkiss, Jr.
Patriot Medal	Roger Linscott
State Distinguished Service	Charles B. Smith, V.
State Meritorious Service Medal	Albert Conant
Bronze CAR Medal of Appreciation	Jackson Bellard – CAR NV State President

<b>Silver Good Citizenship Medal</b>	David Hess
<b>Certificate of Appreciation – Co-Chairman of State Meeting 2020</b>	Michael Fitzpatrick Jonathan Dickey

**6. President Hotchkiss asked for Chapter Reports:**

- a. Battle Born Patriots President David Hess had submitted his report via email (Attachment 4), He added thanks to everyone in Battle Born for their outstanding work in preparation for the Annual Conference despite the situation. President Hotchkiss also lauded their organization as an example of excellence.
- b. Signers Chapter President Charles Smith also submitted his report via email (Attachment 5). He noted that his chapter has learned much from the Battle Born Patriots, and have adopted some of their practices. Signer now have formal bi-monthly meetings and have adopted “Compatriot’s Muster” for the in between months. These have worked good to build rapport and camaraderie in his chapter. Also as State Registrar, he recognized Battle Born’s outstanding record of reaching out to past members and reinstating them into the active roles.

7. The next order of business was the election of the slate of officers. President Hotchkiss called for nominations from the floor. Hearing none, he proceeded to ask for a vote to accept the slate of uncontested officers proposed (Attachment 6). (Note: The original slate distributed for consideration had two positions requiring a separate vote. The Color Guard Commander Position had two candidates, Robert Stoecklin and Paul Hicks, and the Secretary position had Paul Bell and Stephen Schroder. Prior to the meeting Paul Hicks withdrew his bid to be the Color Guard Commander, leaving the Secretary Position in question).

The vote was held and the uncontested officers were unanimously elected.

8. Next in preparation for the vote on the remaining Secretary position, President Hotchkiss asked Paul Bell and Stephen Schroeder to each give a short introduction to the On-Line attendees. Following this introduction, while discussing the upcoming vote, Candidate Paul Bell chose to withdraw his

candidacy, making Stephen Schroder our Secretary. Congratulations came from everyone.

9. Signers Chapter President Charles Smith pointed out that we also needed to replace President Emeritus Rev Anthony Perry as the Jones Scholarship Fund Trustee. Treasurer Al Conant made a motion to nominate Stephen Schroder to fill this position, Signers Chapter President Charles Smith seconded the motion and the attendees made this change official.
10. Installation of Officers, President Hotchkiss asked Vice President General Western District James C. Fosdyck to administer the oath of office. After swearing in the new officers, the meeting was turned over to our new President Michael Fitzpatrick.
11. The final order of business was the drawing for George Washington's Original Formula Mount Vernon Distilled Whiskey. The winner this year was Paul Hicks
12. President Michael Fitzpatrick thanked everyone involved for their superb effort preparing the original conference plans, and hinted at the possibility of holding an actual meeting in the near future.
13. Past Vice President General Western District Brian Worcester led the on-line attendees in the SAR Closing, and President Fitzpatrick officially closed the meeting.

For the Secretary  
Albert E. Conant  
Treasurer  
Nevada Society SAR