

***California Society
Annual Report
2021***

***“The BOOK”
April 2022***

California Society Annual Reports January 1, 2021 to December 31, 2021 “The BOOK”

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Section One

Executive Board Reports

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Section One

Executive Board Reports

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CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION
OFFICER REPORT
03/25/2022
SOCIETY PRESIDENT

It has been an both an honor and a privilege to serve as the CA Society President for 2021-2022. I have truly enjoyed developing relationships and working with the Board of Managers. I am proud of the work accomplished during my term, thanks to the hard work of many dedicated individuals who unselfishly serve our society. I appreciate the advice and council of many past Presidents as well as their mentorship. In addition to performing the leadership and administrative duties of the office, such as appointing committee chairs, setting goals and monitoring their progress, approving and processing check requests, handling special requests and outside inquiries, submitting monthly remarks for the Compatriot Newsletter, and communicating with the Officers and membership; I attended the following meetings and events:

April 10, 2021 NSSAR Council of State Presidents meeting – Zoom
April 10, 2021 Nevada Society annual meeting - Zoom
April 16, 2021 Coachella Valley Chapter Meeting – Indian Wells, CA
April 17, 2021 CASSAR 146th Annual meeting – Zoom
April 24, 2021 Riverside Chapter Board meeting - Zoom
April 26, 2021 Wreaths Across America Traveling Museum – Menifee, CA
May 4, 2021 CASSAR Operations Committee meeting - Zoom
May 6, 2021 Published 2021 Goals in Special Edition of the Compatriot
May 6, 2021 Harbor Chapter meeting – Torrance, CA
May 31, 2021 Memorial Day Color Guard Zoom meeting – Zoom
June 15, 2021 Riverside Chapter meeting – Riverside, CA
July 4, 2021 Butterfield Trail Chapter DAR City of Corona Independence Day Parade
July 4, 2021 Let Freedom Ring City of Cerritos – CASSAR Color Guard
July 10-16 NSSAR Congress – Renton, WA Council of State Presidents
July 31, 2021 Memorial Service Compatriot James Beatty Redwood Empire Chapter – Napa, CA
August 14, 2021 Orange County Chapter picnic – Fountain Valley, CA
August 25, 2021 NSSAR Compatriot Training Committee meeting - Zoom
September 2, 2021 Harbor Chapter meeting – San Pedro, CA
September 9, 2021 Fall BOM Planning Committee meeting – my house
September 10, 2021 Mission Inn Contract meeting – Zoom
September 11, 2021 Patriots Day Pacific Symphony Orchestra concert – CASSAR Color Guard
October 7, 2021 Fall BOM Planning Committee meeting – my house
October 7, 2021 Riverside Visitors and Convention Bureau meeting – Riverside, CA
October 19, 2021 Riverside Chapter meeting – Riverside, CA

SOCIETY PRESIDENT REPORT
PAGE TWO

October 21, 2021 Fall BOM Planning Committee meeting – my house
October 27, 2021 NSSAR Council of State Presidents meeting - Zoom
November 4-7, 2021 CASSAR Fall Board of Managers meeting – Riverside, CA
November 16, 2022 Riverside Chapter meeting – Riverside, CA
November 27, 2021 Yosemite Chapter meeting - Zoom
December 7, 2021 CASSAR Executive Committee meeting – Zoom
December 18, 2021 Wreaths Across America Evergreen Memorial Cemetery-Riverside, CA
January 5, 2022 Harbor Chapter meeting – San Pedro, CA Officer Induction
January 7, 2022 CASSAR Executive Committee meeting – Zoom
January 8, 2022 Eagle Chapter meeting – Fallbrook, CA Officer Induction
January 18, 2022 Memorial Service Compatriot James Meador – Riverside National Cemetery
January 18, 2022 Riverside Chapter meeting – Riverside, CA Officer Induction
January 19, 2022 Memorial Service Compatriot Thomas Chilton Sacramento Chapter Meeting
January 21, 2022 Coachella Valley Chapter meeting – Indian Wells, CA Officer Induction
February 8, 2022 NSSAR Compatriot Training Committee meeting – Zoom
February 15, 2022 Riverside Chapter Meeting – Riverside, CA
February 15, 2022 NSSAR CAR Liaison Committee meeting – Zoom
February 27, 2022 Butterfield Trail Chapter DAR Meeting – Monrovia, CA CASSAR Color Guard
March 3-5, 2022 NSSAR Spring Leadership meeting – Louisville, KY Council of State Presidents
March 15, 2022 Riverside Chapter meeting – Riverside, CA
March 17, 2022 CA Society DAR State meeting – Irvine, CA
April 1, 2022 Published 2021 Goals Progress Report – California Compatriot
April 1-2, 2022 Nevada Society State meeting – Las Vegas, NV
April 21-23, 2022 CASSAR 147th Annual Membership meeting - Sacramento, CA

Thank you for the opportunity to serve as President. I am confident in the future leadership of our society and look forward to serving as the Trustee for the California Society for 2022- 2023.

Libertas et Patria,
Brian Stephens,
CASSAR President 2021-2022

CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION
147th Annual Meeting April 2022
Executive Vice President Report

Executive Vice President Report

During the period April 2021 to March 2022, I participated in the following events in addition to my normal duties:

SAR Meetings

- Attended the 2021 National Congress in Renton, WA.
- Attended the 146th BOM Meeting in Riverside, CA.
- I attended 20 Chapter Meetings
 - Sacramento Chapter Meetings (9)
 - Riverside Chapter Meeting
 - Yosemite Chapter Meetings (4)
 - Harbor Chapter Meeting
 - Delta Chapter Meeting (2)
 - Thomas Jefferson Chapter Meeting
 - General George Washington Chapter
 - Mother Lode Chapter
- Hosted multiple CASSAR secretary forums (on Zoom).
- Attended monthly CASSAR virtual leadership meetings.
- Installed officers at the General George Washington Chapter, Thomas Jefferson Chapter, and Sacramento Chapter.

Color Guard Events:

- Attended a Color Guard event in uniform on Flag Day with Sacramento Chapter DAR at Land Park in Sacramento.
- Served as an Honor Guard member during the funeral of Past President James Beatty, Redwood Empire Chapter at Sacramento Valley National Cemetery.
- Attended a Color Guard Event at the Charlotte Parkhurst DAR Chapter. Granite Bay, CA.
- Attended a Color Guard Event at the South Lake Chapter DAR Chapter in Cameron Park. CA.
- Attended Freedoms Foundation Awards Dinner in uniform.
- Attended a Book Donation event at John Adams Academy in Loomis CA in uniform.

America 250 SAR

Presented America 250 events at the George Washington Chapter and Delta Chapter "*Ten Crucial Days of the American Revolution*".

Miscellaneous:

- Presented a Flag Certificate to Donald and Loretta Lawson in El Dorado Hills, CA.
- Presented Certificates of Patriotism to Edward Comingore Jr (WWII and Korea) and David Cofer (Military Service).
- Presented SAR Good Citizenship Medal and Certificate to Sea Cadet PO2 Mpho Latique of the Ticonderoga Chapter.

Respectfully Submitted,
Craig Anderson



California Society

Sons of the American Revolution

VICE PRESIDENT – NORTH

146th Annual CASSAR Meeting

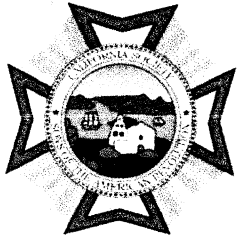
March 13, 2022

I was inducted as Vice President – North CASSAR on April 17, 2021 by President General Jack Manning (NSSAR) virtual meeting.

- **I attended Most of the virtual chapter meeting of the Mother Lode Chapter, Redwood Empire Chapter, Sacramento Chapter, Thomas Jefferson Chapter, Yosemite Chapter.**
- **I Sent out e-mails to Northern California Chapters.**
- **May 2021 First SAR meeting in person since 2019 Redwood Empire Chapter.**
- **I attended virtual San Diego Chapter Memorial Day activities on Memorial Day.**
- **Presented Emergency Medical Service Medal to Jason Bond and staff at Napa AMR FOR SERVICE AND RESPONSE DURING THE FIRES OF 2019 Sonoma & Napa County.**
- **August 3, 2021 Attended Funeral at Sacramento Valley National Cemetery Dixon Cali, for Past President James Beatty Redwood Empire Chapter CASSAR.**
- **July 10-15 2021 Attended National Congress at Renton Washington State.**
- **August 2021 Attended Eagle Scout Court of Honor Petaluma Church of Christ Troop 848 to Isabella Terrazas, Petaluma, Ca.**
- **State President Monthly Zoom meetings.**
- **August 20, 2021 Attended virtual Zoom meeting Redwood Empire Chapter.**

- **Sept 17, 2021 Attended Redwood Empire Chapter swearing in a new Compatriot.**
- **Sept 18, 2021 Attended Thomas Jefferson Chapter meeting assisted with swearing in two new Compatriots to their Chapter.**
- **October 3, 2021 Attended Eagle Scout Court of Honor for Sean Smile Santa Rosa Calif.**
- **October 15, 2021 Attended Redwood Empire Chapter Petaluma Ca and Sacramento Chapter Meetings Sacramento Ca.**
- **November 3-5 2021 Attended Board of Managers Meeting Riverside Ca.**
- **Nov 19, 2021 Attended Redwood Empire Meeting Petaluma Ca.**
- **Nov 27, 2021 Zoom Meeting Yosemite Chapter.**
- **Dec 17, 2021 Attended Redwood Empire Chapter Meeting.**
- **Dec 18, 2021 Attended Wreaths Across America Ceremony Laying Capt. William Smith Headstone, Sonoma Ca.**
- **Jan 15, 2022 Attended Thomas Jefferson Chapter swearing in new officers.**
- **Jan 19, 2022 Attended Sacramento Chapter Memorial Service.**
- **Jan 21, 2022 Zoom Meeting Redwood Chapter Induction of Officer's Covid Lock down.**
- **Jan 22, 2022 Zoom Meeting Yosemite Chapter.**
- **Feb 18, 2022 Attended Redwood Empire Chapter, Awarded Eagle Scout Medal. Swearing in Lord Stanley Laughlin as Secretary.**
- **Feb 22, 2022 Zoom meeting Mother Load Chapter.**
- **Feb 26, 2022 Zoom meeting Yosemite Chapter.**
- **Mar 12, 2022 Attended 9th Annual Inspection, Chief Petty Officer Pinning, Performance & Awards Ceremony. Redwood City, California.**
- **Mar 18, 2022 Attended Redwood Empire Chapter.**

William G. Van Valkenburg
 Vice President – North
 CASSAR
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**The California Society of the
Sons of the American Revolution
VICE PRESIDENT – SOUTH
OFFICER'S REPORT
147th Annual Meeting
March 25, 2022**

JIM KLINGLER
Vice President - South
Phone: (949) 854-7698
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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. I am pleased that I was able to attend a number of your virtual and in-person Chapter meetings during the past two years, and I am encouraged that 10 of the 13 chapters in CASSAR-South are now holding in-person meetings.

My activities on behalf of CASSAR for the past 12 months are listed below:

California Society SAR:

- Participated in the CASSAR Annual Meeting on April 17, 2021.
- Completed the filing of the CASSAR 2020 federal and state tax returns by the due date of May 15, 2021.
- Participated with CASSAR Eagle Scout Program Chairman, William Nay, and SAR Orange County Chapter Eagle Scout Program Chairman, David Beall, in presenting the Eagle Trophy in person to the State winner of the 2020 Eagle Scout Contest, John McPhie on May 21, 2021.
- Updated the CASSAR Chapter Speakers Bureau that I previously established by adding CASSAR speakers on various topics related to the SAR who are available to speak at Chapter meetings, and posting it on the CASSAR website.
- Participated in the monthly CASSAR President Advisory meetings on April 4, May 4, June 1, July 6, August 3, September 7, October 5, 2021, and December 7, 2021.
- Participated in the CASSAR Board of Managers Meeting at the Mission Inn in Riverside, CA from November 4-7, 2021.
- Served as Co-Chairman with William Van Valkenburg of the CASSAR Flag Certificate committee to record the number of Flag Certificates issued by Chapters and prepare the CASSAR Flag Certificate Report to NSSAR.
- Served on the Task Force to review and recommend an increase in the annual dues paid to Chapters from the State for their Life Members. The proposal from the Task Force will be presented to the members at the Annual Meeting on April 22-23, 2022.

California Society SAR Chapters:

- Participated in a joint SAR Color Guard event, hosted by the SAR San Diego Chapter on May 22, 2021 to film Memorial Day commemorations at various military bases in the San Diego area. This event was broadcast on Memorial Day and included SAR Chapters from across the country.

- Participated in the joint SAR Color Guard event for Memorial Day at the Orange County Cemetery in Santa Ana on May 31, 2021.
- Participated in the joint SAR Color Guard event for the Let Freedom Ring Independence Day celebration at the City Hall in Cerritos on July 4, 2021.
- Participated in the joint SAR Color Guard event for the annual meeting of the Exchange Club in Lake Forest on August 28, 2021.
- Participated in the joint SAR Color Guard event for Patriot's Day with the Pacific Symphony at the Orange County Fairgrounds in Costa Mesa on September 11, 2021.
- Participated in the joint SAR Color Guard event for the CASSAR Board of Managers Meeting at the Mission Inn in Riverside, CA from November 4-7, 2021, including the changing of command for the CASSAR Color Guard.
- Participated in the joint SAR Color Guard event for Wreaths Across America at the Memorial Park Cemetery in Brea on December 18, 2021.
- Participated in the joint SAR Color Guard event for the Annual meeting of the California DAR at the Irvine Marriott Hotel on March 19, 2022.
- Attended the SAR annual picnic hosted by the Orange County Chapter for all SAR members on August 14, 2021, and attended monthly Orange County Chapter in-person meetings on April 10, May 8, June 12, September 11, and October 9, 2021, and January 8 (including swearing in chapter officers), February 12, and March 12, 2022.
- Attended the SAR South Coast Chapter virtual and in-person meetings on March 16, and September 21, 2021, and January 18, 2022 (including swearing in chapter officers).
- Attended the SAR Riverside Chapter virtual meeting on March 16, 2021, and in-person meeting on February 15, 2022.
- Attended the SAR Redlands Chapter virtual meetings on March 20, and October 16, 2021, and January 15, 2022 (including swearing in chapter officers).
- Attended the SAR San Diego Chapter virtual meetings on March 20, June 19, and November 20, 2021, and in-person meeting on January 22, 2022 (including swearing in chapter officers).
- Attended the SAR Harbor Chapter virtual meeting on June 3, and in-person meetings on September 2, 2021, and January 5, 2022.
- Attended the SAR Eagle Chapter in-person meeting on June 5, 2021.
- Attended the SAR Coachella Valley Chapter in-person meeting on October 15, 2021.
- Attended the SAR Sons of Liberty Chapter virtual meetings on October 16, 2021, and March 26, 2022 (including swearing in chapter officers).
- Attended the SAR General George Patton Chapter in-person meeting on November 12, 2021.
- Attended the SAR Central Coast Chapter virtual meeting on November 20, 2021, (including presenting the Liberty Medal Oak Leaf Cluster to Russell Haynes).

National Society SAR:

- Attended the 131st SAR Congress in Renton, WA from July 9-14, 2021. I served as Co-Chair of the Finance, Budget, and Investment Committee meeting on July 13, 2021.
- Attended the SAR Fall Leadership Meeting in Louisville, KY from September 23-25, 2021. I served as Co-Chair of the Finance, Budget, and Investment Committee meeting on September 24, 2021, and represented the Finance Committee at the EXCOM meetings on September 23 and 25, and the Trustees meeting on September 25, 2021. I also attended the Investment Committee meeting with Fifth Third Bank September 23, 2021.
- Attended the SAR Trustees virtual meeting on December 4, 2021, to present the report of the Finance Committee regarding the transfer of funds from the SAR Foundation to the SAR.
- Attended the SAR Spring Leadership Meeting in Louisville, KY from March 3-5, 2022. I served as Co-Chair of the Finance, Budget, and Investment Committee meeting on March 4, 2022, and represented the Finance Committee at the EXCOM meetings on March 3 and 5, and the Trustees meeting on March 5, 2022. I also attended the Investment Committee meeting with Fifth Third Bank on March 3, 2022.
- As Chairman of the SAR Finance committee, I conducted virtual Zoom meetings with the Finance, Budget, Investment and Audit committees on March 15, and October 19, 2021. At the March 15 meeting we reviewed the Feasibility Study prepared by the MBA students at Bellarmine University for the Roof Top Garden at SAR Headquarters in Louisville. A report from the Finance Committee analyzing the Feasibility Study was sent to EXCOM on April 19, 2021. At the October 19 meeting we met with the independent accounting firm for the SAR, Dean Dorton, to discuss the transfer of funds from the SAR Foundation to the SAR. The Finance Committee issued the report to EXCOM on November 8, 2021.
- As Vice Chairman of the SAR Investment Committee, I participated in a virtual meeting of the committee with Fifth Third Bank on August 23, 2021 to discuss the investment allocation strategy for the SAR and SAR Foundation funds. Also, I participated in virtual meetings of a Task Force of the Investment Committee to analyze the fees charged by Fifth Third Bank in comparison to other investment firms on November 7, November 8, December 15, and December 29, 2021 and January 5, and January 25, 2022. The Task Force report was presented to EXCOM on March 3, 2022 at the Spring Leadership Meeting.
- Participated as a member of the SAR National Dues Billing Task Force in virtual meetings on March 25, April 8, April 15, and May 6, 2021 to discuss dues automation alternatives.
- Participated as a member of the SAR Museum Board in virtual meetings on June 29, August 26, November 8, and November 29, 2021, and February 2, and February 7, 2022, and the in-person meetings on September 23, 2021, and March 3, 2022.
- Participated as a member of the SAR Strategic Planning Committee in a virtual meeting on August 19, October 26, and November 23, 2021, and January 24, 2022 and the in-person meetings on September 24, 2021 and March 4, 2022.

Respectfully Submitted,

Jim Klingler

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



**2021 Annual Officer Report
Vice President of Membership
James Bunker, PhD**

It is my pleasure serve as Vice President of Membership and I seek 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.

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. **274 potential members** contacted me during 2021, 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. Additionally, I believe there is a need for more consistent messaging from individual chapters regarding potential new members who are interested in joining and require assistance with the application process. One suggestion was to provide a list of best practices for responding to new member inquiries as well as potential CASSAR zoom training modules for chapter registrars. Finally, I have been keeping track of applicants by name who contacted me if there is ever a need to determine how many of these prospects started or completed an application with the chapter, CASSAR, and SAR.

Additionally, I am now a part of the CASSAR America 250 SAR Steering Committee and have been active in the development of the America 250 Minute Program and have developed presentation resources for CASSAR members regarding that program. I am also the President of the Harbor Chapter as of January 2022.

California Society
State Secretary Report
January 1, 2021 to March 1, 2022

At the 2020 Board of Managers Meeting then President Don Littlefield opened the door for a committee to be formed to investigate the appointment of an assistant/deputy state secretary to reduce the workload that the current state secretary maintains. In the late spring of 2021 President Brian Stephens authorized the formation of the committee-to make recommendation.

At the 2021 Fall Board of Managers Meeting President Brian Stephens appointed, the President of the San Diego Chapter, Barry Keys to the position of assistant State Secretary, as a non-voting position, to assist the California Society State Secretary with specific duties that were outlined by the committee.

The CASSAR Historian position was vacant at the Fall 2021 BOM Meeting, and while the California Society State Secretary was unable to attend the meeting, the proceedings were recorded and the state secretary transcribed the meeting minutes and published the minutes according to the society bylaws.

In January 2022, the California State Secretary, was hospitalized with COVID and was able to work from January 7, 2022 to January 28, 2022 during that time frame, most of the chapters had submitted their 2021-2022 Reconciliation Reports with only five chapter still outstanding, all reports were completed and submitted to the California Society Secretary on or before February 7, 2022 so the CASSAR Reconciliation Report could be completed. The California State Secretary notified National that the California Report would be a few weeks late due to an illness. The NSSAR Reconciliation Report was submitted on Monday, February 21, 2022. NSSAR Reviewed the report and two errors were found in the report and corrected on January 23, 2022. The California Society had the following transactions in 2021:

| | |
|---------------------------|---------|
| New Members. | 147 |
| New Junior Members. | 20 |
| Transfers into California | 7 |
| Transfers out-California | 46 |
| Total Additions. | 220 |

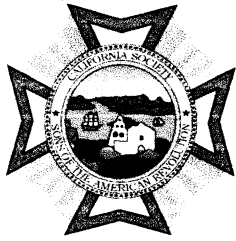
The society had 225 losses which included 22 deaths and 203 dropped, transfers and resignation during 2021, for a net loss of membership of five (5) members. During an analysis, it was noticed that the societies great number of drops come around the sixth (6th and 7th) year which is contrary to the belief the most members drop after the first year. Our challenge as a society would be to find a way to get the members active so that we do not loose the membership after six (6) or seven (7) years.

The California Society State Secretary, conducted training on a variety of topics from September 2021 to March 2022, the participation averaged about six (6) chapter secretaries, with different secretaries participating different months. Chapters seem to have the greatest difficulty with the differentiation between the different types of Old Life Members, New CA Life Members, NSSAR Life Members and, Emeritus Members. The last training in March was how to simplify the Reconciliation process and the annual year end chapter reports, which each chapter needs to submit for the "BOOK." The California State Secretary will conduct additional training this coming fall on topics relative to the 2023 Reconciliation Report.

The California State Secretary started a quarterly meeting with all of the 55 states secretary's and the NSSAR Registrar in April 2021. The state secretary meeting is well attended and it the hoe of the group that the secretary group will be recognized as an ongoing meeting by the annual congress, similar to the Presidents and Executive Vice-Presidents groups. The group meets in February, May, September and November to discuss issues that all states have in common. The meeting last only one hour and any items not discussed that were on the agenda are carried over to the next meeting.

Attached is a summary of the Annual Reconciliation Report for the California Society: the state lost a total of five (5) members in 2021 while several chapter had significant gians in their membership rosters.

| ANNUAL REPORT RECONCILIATION for (State Society): | | CA |
|--|--|----------|
| Active Membership as of 01/01/2021: | | 1653 |
| Plus: New Regular Members: | | 147 |
| Plus: New Jr Members | | 20 |
| Plus : New Memorial Members: | | 0 |
| Plus : Transfer In: | | 5 |
| Plus : Reinstatements: | | 46 |
| Plus : Reinstatements-Transfers: | | 2 |
| Total Additions: | | 220 |
| Less : Deceased: | | 25 |
| Less : Deceased Memorial: | | 0 |
| Less : Resignations: | | 6 |
| Less : Transfers Out: | | 16 |
| Less : Dropped: | | 178 |
| Total Losses: | | 225 |
| Membership Gain / Loss: | | -5 |
| Total Active Members as of 01/01/2021: | | 1653 |
| Plus / Less: Membership - Gain / + Loss: | | -5 |
| Total Active Members as of 01/01/2022: | | 1648 |
| DUES CALCULATION | | |
| Total Active Members as of 01/01/2022: | | 1648 |
| Less: Emeritus Members: | | 17 |
| Less: National Regular Life Members: | | 54 |
| Less: All Junior Members: | | 114 |
| Less: Sep-Dec New Regular Members: | | 21 |
| Less: Sep-Dec Regular Member Reinstatements: | | 4 |
| Less: Sep-Dec Regular Member Reinstatement-Transfers: | | 0 |
| Total Adjustment to Membership: | | 210 |
| Total Billable Regular Members: | | 1438 |
| Dues Owed for Regular Membership: X \$35 = | | \$50,330 |
| Total Active Junior Members as of 01/01/2022: | | 114 |
| Less: National Junior Life Members: | | 0 |
| Less: Sep-Dec New Junior Members: | | 0 |
| Less: Sep-Dec Junior Member Reinstatements: | | 0 |
| Less: Sep-Dec Junior Member Reinstatement-Transfers: | | 0 |
| Total Billable Junior Membership X \$5.00: | | 114 |
| x \$5 = | | \$570 |
| Total Billable Membership: | | \$50,900 |
| Total Received | | \$0 |
| Amount (Over)/Under: | | \$50,900 |



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

John R Ferris
Treasurer
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TREASURER'S REPORT
JANUARY 1 TO DECEMBER 31, 2021
ACTUAL COMPARED TO FULL-YEAR BUDGET

The following are the operating receipts and expenses for the fiscal year ending
December 31, 2021:

INCOME STATEMENT

| | 12 Months 2021 <u>Actual</u> | FY 2021 Annual <u>Budget</u> | Variance <u>To Budget</u> |
|---|---|---|--------------------------------------|
| RECEIPTS | | | |
| I-01A · Annual Dues Received - CASSAR | \$ 23,819 | \$ 23,860 | \$ (41) |
| I-01B · Annual Dues Received - NSSAR | \$ 41,320 | \$ 42,350 | \$ (1,130) |
| I-03A · LM Annual CASSAR Dues (from Inv acct) | \$ 5,720 | \$ 5,700 | \$ 20 |
| I-03B · LM Annual NSSAR Dues (from Inv acct) | \$ 8,750 | \$ 8,925 | \$ (175) |
| I-04 · LM Dues for Chapters (from Inv acct) | \$ 2,158 | \$ 2,850 | \$ (692) |
| I-05 · New Member CASSAR Dues | \$ 3,385 | \$ 3,600 | \$ (215) |
| I-06 · Supplemental App State Fee | \$ 920 | \$ 850 | \$ 70 |
| I-08 · Bank Account Interest | \$ 11 | \$ 10 | \$ 1 |
| I-09 · Reinstated Member Fee | \$ 615 | \$ 4,280 | \$ (3,665) |
| I-14 · Interest Income-San Diego Fund | \$ 1,647 | \$ 1,600 | \$ 47 |
| I-16 · New Life Member Dues | \$ 2,524 | \$ 700 | \$ 1,824 |
| I-17 · Other Income | \$ 0 | \$ 140 | \$ (140) |
| I-18 · Transfer From Education Fund | \$ 2,500 | \$ 2,500 | \$ 0 |
| I-19 · Transfer From Unallocated Fund | \$ 0 | \$ 2,000 | \$ (2,000) |
| I-25 · Receipts for Data Records | \$ 30 | \$ 0 | \$ 30 |
| I-25 · Donations | \$ 18,830 | \$ 1,000 | \$ 17,830 |
| I-53 · 2019 Congress Medal Sets | \$ 0 | \$ 350 | \$ (350) |
| I-60 · Compatriot Postage | \$ 125 | \$ 0 | \$ 125 |
| I-62 · Compatriot Subscription Fees | \$ 200 | \$ 264 | \$ (64) |
| Total Receipts | \$ 112,554 | \$ 100,979 | \$ 11,575 |

Executive Committee Expenses

| | | | | | | |
|---------------------------------------|----|--------------|----|--------------|----|----------------|
| A-01 · President Expenses | \$ | 303 | \$ | 500 | \$ | (197) |
| A-02 · Executive VP Expenses | \$ | 0 | \$ | 300 | \$ | (300) |
| A-03 · VP North Expenses | \$ | 0 | \$ | 100 | \$ | (100) |
| A-04 · VP South Expenses | \$ | 0 | \$ | 100 | \$ | (100) |
| A-05 · VP Membership Expenses | \$ | 0 | \$ | 1,000 | \$ | (1,000) |
| A-06 · Executive Secretary Expenses | \$ | 555 | \$ | 1,600 | \$ | (1,045) |
| A-07 · Treasurer Expenses | \$ | 165 | \$ | 300 | \$ | (135) |
| A-08 · Registrar Expenses | \$ | 314 | \$ | 700 | \$ | (386) |
| A-09 · Genealogist Expenses | \$ | 0 | \$ | 100 | \$ | (100) |
| A-11 · Chancellor Expenses | \$ | 0 | \$ | 100 | \$ | (100) |
| A-12 · Historian Expenses | \$ | 65 | \$ | 100 | \$ | (35) |
| A-14 · Chaplain Expenses | \$ | 0 | \$ | 100 | \$ | (100) |
| A-15 · Surgeon Expenses | \$ | 0 | \$ | 100 | \$ | (100) |
| Total Exec. Committee Expenses | \$ | 1,402 | \$ | 5,100 | \$ | (3,698) |

Committee Expenses

| | | | | | | |
|--|----|---------------|----|---------------|----|-----------------|
| B-21 · Awards & Medals Committee Expenses | \$ | 2,220 | \$ | 1,500 | \$ | 720 |
| B-22 · Best Chapter Contest Expenses | \$ | 0 | \$ | 650 | \$ | (650) |
| B-24 · New Chapter Assistance Expenses | \$ | 0 | \$ | 250 | \$ | (250) |
| B-27 · Poster Contest Expenses | \$ | 902 | \$ | 1,200 | \$ | (298) |
| B-29 · Brochure Contest | \$ | 700 | \$ | 1,200 | \$ | (500) |
| B-30 · Oration Contest | \$ | 1,000 | \$ | 1,770 | \$ | (770) |
| B-33 · JROTC Committee Expenses | \$ | 1,000 | \$ | 1,970 | \$ | (970) |
| B-34 · CAR Expenses | \$ | 0 | \$ | 1,000 | \$ | (1,000) |
| B-35 · Eagle Scout Contest Expenses | \$ | 1,145 | \$ | 1,970 | \$ | (825) |
| B-36 · Law Enforcement/Public Service Awards | \$ | 225 | \$ | 750 | \$ | (525) |
| B-37 · DAR Liaison Expenses | \$ | 100 | \$ | 250 | \$ | (150) |
| B-39 · Essay Contest Expenses | \$ | 1,000 | \$ | 1,770 | \$ | (770) |
| B-40 · Travel Assistance for Contestants | \$ | 0 | \$ | 1,400 | \$ | (1,400) |
| B-41 · Spring Meeting Allowance | \$ | 200 | \$ | 500 | \$ | (300) |
| B-42 · Fall Meeting Allowance | \$ | 500 | \$ | 500 | \$ | 0 |
| B-43 · Visiting PG Expenses | \$ | 204 | \$ | 1,900 | \$ | (1,696) |
| B-44 · Sea Cadets Expenses | \$ | 1000 | \$ | 1,200 | \$ | (200) |
| B-50 · 2019 Congress Expenses | \$ | 0 | \$ | 0 | \$ | 0 |
| B-60 · Valley Forge Contest Expenses | \$ | 610 | \$ | 4,200 | \$ | (3,590) |
| B-70 · Richard F. Locke Award | \$ | 1,500 | \$ | 1,250 | \$ | 250 |
| Total Committee Expenses | \$ | 12,306 | \$ | 25,230 | \$ | (12,924) |

Program Expenses

| | | | |
|--|-----------------|-----------------|-------------------|
| C-45 · California Compatriot Expenses | \$ 1,194 | \$ 1,600 | \$ (406) |
| C-49 · CASSAR Flag Expenses | \$ 0 | \$ 150 | \$ (150) |
| C-50 · Congress Hospitality Suite | \$ 1,818 | \$ 750 | \$ 1,068 |
| C-51 · Color Guard Cmdr. Flags & Streamers | <u>\$ 0</u> | <u>\$ 1,250</u> | <u>\$ (1,250)</u> |
| Total Program Expenses | \$ 3,012 | \$ 3,750 | \$ (738) |

Other Operating Expenses

| | | | |
|---------------------------------------|-------------------------|-------------------------|--------------------------|
| E-01 · Annual Dues to NSSAR | \$ 49,575 | \$ 51,275 | \$ (1,700) |
| E-02 · LM Dues to Chapters | \$ 2,860 | \$ 2,850 | \$ 10 |
| E-03 · Filing Fees | \$ 80 | \$ 100 | \$ (20) |
| 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 | \$ 780 | \$ 750 | \$ 30 |
| E-31 · Cloud Storage Fees | \$ 0 | \$ 200 | \$ (200) |
| E-40 · Other CASSAR Expenses | \$ 70 | \$ 2,000 | \$ (1,930) |
| E-55 · The SAR Foundation | \$ 0 | \$ 0 | \$ 0 |
| E-70 · Communication Software | \$ 0 | \$ 600 | \$ (600) |
| E-80 · Credit Card Fees | <u>\$ 0</u> | <u>\$ 25</u> | <u>\$ (25)</u> |
| Total Other Operating Expenses | <u>\$ 53,993</u> | <u>\$ 58,430</u> | <u>\$ (4,437)</u> |

| | | | |
|--|-------------------------|-------------------------|---------------------------|
| Total Operating Expenses | <u>\$ 70,713</u> | <u>\$ 92,510</u> | <u>\$ (21,797)</u> |
| Net Operating Surplus/(Deficit) | \$ 41,841 | \$ 7,469 | \$ 34,342 |

E-51 · Transfers to (from) Investment Accounts

| | | | |
|-------------------------------|------------------|-----------------|-------------------|
| Congress Fund (2136-095) | \$ 2,050 | \$ 2,000 | \$ 50 |
| Education Fund (0129-095) | \$ 4,040 | \$ 1,600 | \$ 2,440 |
| Permanent Fund (0130-095) | \$ (5,455) | \$ 350 | \$ (5,805) |
| Life Member Fund – (2510-095) | \$ (11,041) | \$ 3,656 | \$ (14,697) |
| Unallocated Fund (0390-095) | <u>\$ 10,406</u> | <u>\$ 0</u> | <u>\$ 10,406</u> |
| Total | \$ 0 | \$ 7,606 | \$ (7,606) |

| | | | |
|------------------------------|-------------------------|----------------------|-------------------------|
| Net Surplus/(Deficit) | <u>\$ 41,841</u> | <u>\$ 863</u> | <u>\$ 40,978</u> |
|------------------------------|-------------------------|----------------------|-------------------------|

Notes to Income Statement:

1. Receipts – Total receipts for fiscal 2021 of \$112,554 were \$11,575, or approximately 10%, above the annual budget, primarily due to higher than budget Donations of \$18,300. Major variances to budget receipts were:
 - a. Receipts for donations exceeded budget by \$17,830. \$14,800 was received from Intel (D. Littlefield), \$500 received from Chevron (C. Anderson) and LACASSAR donated \$3,000.
 - b. Reinstatement member fees were \$3,665 less than budgeted as fewer members re-joined than expected.
2. Expenses – Total operating expenses for fiscal 2021 of \$70,713 were under budget by \$21,797, primarily due to less Committee Expenses (\$12,924 under budget) and less Other Operating Expenses (\$4,437 under budget.)
3. Transfers To (From) the Investment Account –
 The following took place on April 28, 2021:
 - Take \$11,040.57 OUT of the Life Membership Fund (2510-095)
 - Take \$5,455.26 OUT of the Permanent Fund (0130-095)
 - Put \$4,039.53 INTO the Education Fund (0129-095)
 - Put \$2,050.00 INTO the Congress Fund (2136-095)
 - Put \$10,406.30 INTO the Unallocated Fund (0390-095)

BALANCE SHEET

The Balance Sheet as of December 31, 2021 shows the following balances:

| | |
|--|-----------------------------|
| Assets: | |
| Cash and Savings Account – Bank of America | \$ 46,622 |
| Investment Account – Morgan Stanley | <u>\$539,270</u> |
| Total Assets | <u>\$585,892</u> |
| Equity: | |
| Equity Accounts | \$ 271,558 |
| Retained Earnings | <u>\$ 314,334</u> |
| Total Equity | <u>\$ 585,892</u> |
| Total Liabilities & Equity | <u>\$585,892</u> |

TREASURER ACTIVITIES – 2021

Tax and Regulatory Agency Forms for CASSAR

1. IRS Form 990 (**SUBMITTED** for filing prior to May 15th.)
2. California Form 199 (**SUBMITTED** for filing prior to May 15th.)
3. IRS Forms 1099 and 1096 – For Youth Awards **FILED**
4. California Form RRF-1 (**SUBMITTED** for filing prior to May 15th.)
5. D&O and General Liability Insurance Policies with NIAC. **PURCHASED**
6. Statement of Information 100. **FILED**

National Society Committees

1. Audit Committee (Since 2020)
2. Oration Committee (Since 2018)
3. America 250 Committee (Since 2021)
4. Attended Congress, Fall Leadership, Spring Leadership

State Society Committees

1. Oration Committee Chair (2018-2021)
2. America 250 Committee Co-Chair (Since 2021)
3. Color Guard (Since 2014)

Chapter Society Committees

1. Brochure Contest Chairman (Since 2017)
2. Color Guard Co-Commander (Since 2019)
Served in 23 events in 2021 including Mt. Vernon

April 2022 Annual Report of the Genealogist, California State Society, Sons of the American Revolution, April 19, 2021 to April 21, 2022

Reporting Date: April 23, 2022
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 2021 and 2022 the CASSAR Genealogist has continued monitoring and weekly reporting of the number of pended CASSAR applications. During 2021-2022 CASSAR has had, at any one time, 15 to 29 pended applications. Currently there are 27 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 2021-2022 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 1970 SAR member lineages to their patriot ancestors as previously documented on post 1970 SAR record copies.

100% of the 8,280 total CASSAR post 1984 lineages for which record copies are available have now been entered into the SAR PRS by about 50 CASSAR data entry volunteers over a 4 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. Approximately 450 1971-1984 CASSAR record copies remain to be entered.

All 24 CASSAR chapter's post 1984 record copies that are available in the PRS have been entered into the SAR PRS as Phase 1. CASSAR SAR PRS Phase 2 data entry has completed to update CASSAR unique Patriot Records in the SAR PRS. This work was coordinated by Jim Faulkinbury and Randy Dhindsa.

NSSAR Online Application Form Data Entry System use and implementation

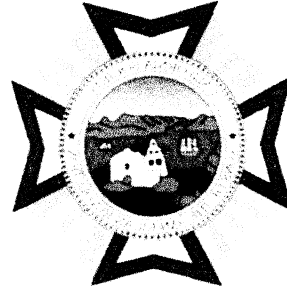
During 2021-2022 the CASSAR Genealogist has actively used, monitored and promoted the use of the NSSAR Online Application Form Data Entry System to all CASSAR Registrars for use in the preparation of all CASSAR applications including new member and new Junior Member applications and for preparation of 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 19, 2022 and since the Fall of 2015, approximately 3,728 CASSAR applications have been started in the SAR Online Application System and approximately 1,577 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.



2022 Report of the Surgeon, California Society Sons of the American Revolution

March 8, 2022

Mr. Brian Stephens
President, California Society Sons of the American Revolution
c/o Mr. Fred Schuster, CASSAR Secretary
Submitted Via Email: schuster6789@aol.com

Dear CASSAR President Stephens and Fellow Compatriots:

It has been my great honor to have served as CASSAR Surgeon since 2017. Please accept this as my 2021-2022 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 remain available through the CASSAR Speakers Bureau to discuss this subject as well as the use of DNA in genealogy research.
 - 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. I continue to serve on the NSSAR Medical Committee under current NSSAR Surgeon General Dr. Ernest Sutton.
 - a. 2021-2022 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; 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. Nine coins

have been made thus far. Most recent coin produced for Dr. Don Juan Vives of Spanish forces in Florida and Louisiana.

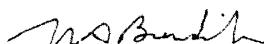
v. I will support any other initiative from the NSSAR Surgeon General.

III. Clinical Activities

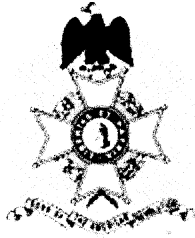
- a. As a physician, I have provided general medical and COVID19 information to the CASSAR and specific chapters in accordance to the public health guidance of the State of California.

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.

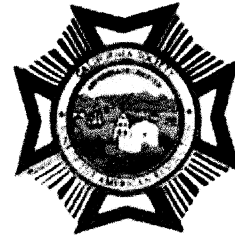
Sincerely,



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



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



President 2020-2021

Semi-Annual Report for the 147th Annual Meeting

SAR Congress, Renton, WA — July 10-14, 2021

CASSAR Annual Meeting, via Zoom — April 17, 2021

CASSAR Board of Managers Meeting, Riverside, CA — November 4-6, 2021

CASSAR Operating Committee, 1st Tuesday of every month January through April 2021

Chapter Meetings:

Sacramento Chapter — 11 monthly meetings and 1 All-Hands Meeting, 2021

Gold Country Chapter, — Zoom — February 20, 2021

Gold Country Chapter, — Zoom — March 20, 2021

Harbor Chapter, — Zoom — March 4, 2021

Mother Lode Chapter, — Zoom — February 23, 2021

Mother Lode Chapter, — Zoom — March 23, 2021

Orange County Chapter, — Zoom — February 13, 2021

Redwood Empire Chapter, — Zoom — March 18, 2021

Riverside Chapter — January 19, 2021

Silicon Valley, — Zoom — January 30, 2021

Silicon Valley, — Zoom — February 27, 2021

Silicon Valley, — Zoom — March 27, 2021

Sons of Liberty — January 23, 2021

Thomas Jefferson Chapter, — Zoom — February 20, 2021

Thomas Jefferson Chapter, — Zoom — March 20, 2021

Yosemite Chapter, Fresno — January 15, 2021

I also participated in the following events:

Americanism Poster Contest Presentations:

Green Valley Elementary, Rescue — Drop off/Pickup — 3 Classrooms

Oak Chan Elementary, Folsom — Drop off/Pickup — 3 Classrooms

Sandra J Gallardo Elementary, Folsom — Drop off/Pickup — 3 Classrooms

Color Guard Events:

Battle of Cowan's Ford, NC — Zoom — January 30, 2021

Alan Brooking Internment — SVNC Dixon, CA — February 2, 2021

Kettle Creek Battlefield, GA — Zoom — February 13, 2021

Guilford Courthouse 240th Anniversary — Zoom — March 13, 2021

Folsom Hometown Parade, Folsom, CA — June 26, 2021

Respectfully,
Donald B Littlefield
President 2020-2021
California SAR

Section Two

Trustee Reports

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Section Two

Trustee Reports

National Trustee

Page 23



TRUSTEES of the CASSAR INVESTED FUNDS

CASSAR Board of Managers Meeting

March 17, 2022

The elected Trustees of the CASSAR Invested Funds are Chairman Stephen R. Renouf (2020-2023), John L. Dodd (2021-2024), 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, 2021:
\$506,187.31.

The ending value of the Invested Fund on February 28, 2021:
\$526,774.83.

During the 12-month period described above, the total funds in the accounts increased by **\$20,587.52**. The increase was due to unrealized gains due to a strong stock market in 2021, despite the unrealized losses of almost \$12k in 2022.

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, 2022:

LIFE MEMBER FUND: \$190,521.99

| | | |
|--------------|--------------------|---------------|
| Cash | \$14,213.56 | 7.46% |
| Equities | \$90,933.31 | 47.73% |
| Fixed Income | \$70,096.15 | 36.79% |
| Alternatives | \$15,278.97 | 8.02% |

Return: 5.46% Last 12 Months; 4.00% Since Inception (on 6/15/2004)

Allocations on 3/16/2022:

| | ACTUAL | TARGET |
|---------------------------|--------|--------|
| Cash | | |
| Global Cash | 6.9% | 7.0% |
| Equities | | |
| US Large Cap Growth | 12.0% | 12.0% |
| US Large Cap Value | 15.5% | 14.0% |
| US Small Cap | 9.6% | 9.0% |
| International Equities | 7.3% | 7.0% |
| Emerging Markets Equities | 3.8% | 3.0% |
| Fixed Income | | |
| Short Term Fixed Income | 24.3% | 25.0% |
| US Taxable Core | 12.6% | 18.0% |
| Other | | |
| REITs | 2.1% | 2.0% |
| Commodities | 5.9% | 3.0% |

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

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, 2022:

| | | |
|------------------------|--------------------|--------|
| EDUCATION FUND: | \$78,678.08 | |
| Cash | \$5,803.14 | 7.38% |
| Equities | \$34,653.59 | 44.04% |
| Fixed Income | \$32,300.65 | 41.05% |
| Alternatives | \$5,920.70 | 7.53% |

Return: 4.37% Last 12 Months; 5.47% Since Inception (on 10/4/2010)

| | | |
|---------------------------|--------|--------|
| Allocations on 3/16/2022: | ACTUAL | TARGET |
| Cash | | |
| Global Cash | 6.8% | 7.0% |
| Equities | | |
| US Large Cap Growth | 12.6% | 12.0% |
| US Large Cap Value | 13.5% | 14.0% |
| US Small Cap Growth | 5.3% | 5.0% |
| US Small Cap Value | 4.0% | 4.0% |
| International Equities | 6.3% | 7.0% |
| Emerging Markets Equities | 2.9% | 3.0% |
| Fixed Income | | |
| Short Term Fixed Income | 23.9% | 25.0% |
| US Taxable Core | 17.1% | 18.0% |
| Other | | |
| REITs | 2.0% | 2.0% |
| Commodities | 5.5% | 3.0% |

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

PERMANENT FUND

The purpose of the Permanent Fund is to 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, 2022:

| | | |
|------------------------|---------------------|--------|
| PERMANENT FUND: | \$123,817.36 | |
| Cash | \$6,870.17 | 5.55% |
| Equities | \$72,641.48 | 58.66% |
| Fixed Income | \$30,440.91 | 24.59% |
| Alternatives | \$13,864.80 | 11.20% |

Return: 6.50% Last 12 Months; 6.86% Since Inception (on 10/4/2010)

| | | |
|---------------------------|--------|--------|
| Allocations on 3/16/2022: | ACTUAL | TARGET |
| Cash | | |
| Global Cash | 5.0% | 5.0% |
| Equities | | |
| US Large Cap Growth | 13.8% | 17.0% |
| US Large Cap Value | 18.0% | 21.0% |
| US Small Cap Growth | 5.7% | 5.0% |
| US Small Cap Value | 4.8% | 5.0% |
| International Equities | 13.0% | 14.0% |
| Emerging Markets Equities | 3.9% | 4.0% |
| Fixed Income | | |
| Short Term Fixed Income | 14.8% | 9.0% |
| US Taxable Core | 9.8% | 10.0% |
| Other | | |
| REITs | 5.3% | 7.0% |
| Commodities | 5.9% | 3.0% |

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, 2022:

| | | |
|-----------------------|--------------------|---------------|
| CONGRESS FUND: | \$21,555.87 | |
| Cash | \$1,203.28 | 5.58% |
| Equities | \$12,539.99 | 58.18% |
| Fixed Income | \$5,335.82 | 24.75% |
| Alternatives | \$2,476.78 | 11.49% |

Return: 4.88% Last 12 Months; 9.37% Since Inception (on 10/23/2019)

| | | |
|---------------------------|--------|--------|
| Allocations on 3/16/2022: | ACTUAL | TARGET |
| Cash | | |
| Global Cash | 5.1% | 5.0% |
| Equities | | |
| US Large Cap Growth | 14.3% | 17.0% |
| US Large Cap Value | 17.8% | 21.0% |
| US Small Cap Growth | 4.8% | 5.0% |
| US Small Cap Value | 4.9% | 5.0% |
| International Equities | 13.0% | 14.0% |
| Emerging Markets Equities | 3.7% | 4.0% |
| Fixed Income | | |
| Short Term Fixed Income | 14.9% | 9.0% |
| US Taxable Core | 9.9% | 10.0% |
| Other | | |
| REITs | 5.0% | 7.0% |
| Commodities | 6.6% | 3.0% |

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, 2022:

UNALLOCATED FUND: \$112,201.53

| | | |
|--------------|--------------------|---------------|
| Cash | \$21,425.57 | 19.10% |
| Equities | \$33,434.58 | 29.80% |
| Fixed Income | \$57,341.38 | 51.11% |
| Alternatives | \$0.00 | 0.00% |

Return: -1.10% Last 12 Months; 3.53% Since Inception (on 6/25/2015)

| Allocations on 3/16/2022: | ACTUAL | TARGET |
|---------------------------------|--------|--------|
| Cash | | |
| Global Cash | 17.9% | 18.0% |
| Equities | | |
| US Large Cap Growth | 8.0% | 7.0% |
| US Large Cap Value | 7.3% | 7.0% |
| US Mid Cap Growth | 1.1% | 1.0% |
| US Mid Cap Value | 1.4% | 1.0% |
| US Small Cap Growth | 1.1% | 1.0% |
| US Small Cap Value | 1.1% | 1.0% |
| International Equities | 7.6% | 8.0% |
| Emerging Markets Equities | 2.9% | 3.0% |
| Fixed Income | | |
| Short Term Fixed Income | 20.5% | 21.0% |
| US Taxable Core | 20.4% | 21.0% |
| International Core Fixed Income | 4.8% | 5.0% |
| Inflation Linked Securities | 2.0% | 2.0% |
| High Yield Fixed Income | 1.9% | 2.0% |
| Emerging Market Fixed Income | 1.8% | 2.0% |
| Other | | |
| REITs | 0.0% | 0.0% |
| Commodities | 0.0% | 0.0% |

Account Risk Profile: **2 (1-most conservative to 5-most aggressive).**

RECENT ACTIVITY.

The Trustees had a call with the Advisor on February 22, 2022 to discuss market conditions. He proposed making the asset allocation change that has long been planned for all of the accounts. We have been waiting a pullback to make those changes, and now seems an opportune time. The idea is to use the JP Morgan Hedged Equity II fund to increase the equity allocation in a way that has some downside hedging in a time of volatility.

The advisor provided a proposal (attached), and the Trustees are recommending that the California Society approve the proposal.

The Trustees will have a call with the Advisor in the fall to see where the fund stands.

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.

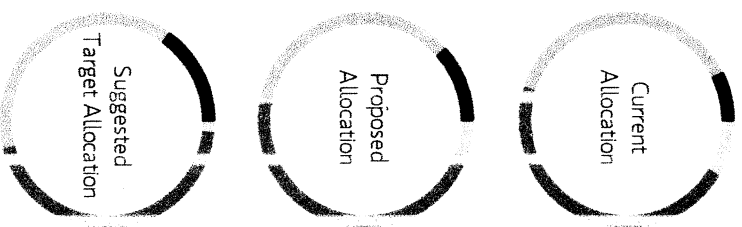
FOR THE TRUSTEES

S/
Stephen R. Renouf
Chairman
2020-2023

S/
John L. Dodd, Esq.
Trustee
2021-2024

S/
M. Kent Gregory
Trustee
2019-2022

Portfolio Asset Allocation Summary



Portfolio Asset Allocation Current Vs. Proposed*

| Asset Class | Current | | Proposed | | Change (Current Vs. Proposed) | |
|---------------------------|-----------------|----------------|-----------------|----------------|-------------------------------|----------|
| | Investment (\$) | % of Portfolio | Investment (\$) | % of Portfolio | Value (\$) | % Change |
| Cash | 45,991 | 8.8 | 30,329 | 5.8 | (15,662) | (3.0) |
| Global Cash | 45,991 | 8.8 | 30,329 | 5.8 | (15,662) | (3.0) |
| Global Equities | 45,991 | 8.8 | 30,329 | 5.8 | (15,662) | (3.0) |
| Equities | 243,156 | 46.4 | 250,332 | 47.8 | 7,176 | 1.4 |
| US Equities | 179,512 | 34.3 | 181,502 | 34.7 | 1,991 | 0.4 |
| US Large Cap Growth | 60,868 | 11.6 | 63,487 | 12.1 | 2,619 | 0.5 |
| US Large Cap Value | 73,701 | 14.1 | 73,177 | 14.0 | (524) | (0.1) |
| US Mid Cap Growth | 1,205 | 0.2 | 1,100 | 0.2 | (105) | 0.0 |
| US Mid Cap Value | 1,519 | 0.3 | 1,100 | 0.2 | (419) | (0.1) |
| US Small Cap Growth | 1,205 | 0.2 | 1,100 | 0.2 | (105) | 0.0 |
| US Small Cap Value | 11,053 | 2.1 | 11,472 | 2.2 | 419 | 0.1 |
| US Small Cap | 29,962 | 5.7 | 30,067 | 5.7 | 105 | 0.0 |
| International Equities | 45,415 | 8.7 | 49,763 | 9.5 | 4,348 | 0.8 |
| International Equities | 45,415 | 8.7 | 49,763 | 9.5 | 4,348 | 0.8 |
| Emerging & Frontier Mkt | 18,229 | 3.5 | 19,067 | 3.6 | 838 | 0.2 |
| Emerging Market Equities | 18,229 | 3.5 | 19,067 | 3.6 | 838 | 0.2 |
| Fixed Income & Preferreds | 197,112 | 37.6 | 182,864 | 34.9 | (14,248) | (2.7) |
| Short Term Fixed Income | 110,106 | 21.0 | 112,044 | 21.4 | 1,938 | 0.4 |
| Short Term Fixed Income | 110,106 | 21.0 | 112,044 | 21.4 | 1,938 | 0.4 |
| US Fixed Income Taxable | 75,063 | 14.3 | 58,458 | 11.2 | (16,605) | (3.2) |
| US Taxable Core | 75,063 | 14.3 | 58,458 | 11.2 | (16,605) | (3.2) |
| Intl Fixed Income | 5,448 | 1.0 | 5,605 | 1.1 | 157 | 0.0 |
| Intl Core Fixed Income | 5,448 | 1.0 | 5,605 | 1.1 | 157 | 0.0 |

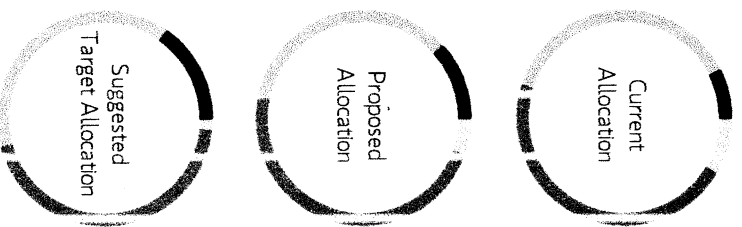
* Your actual asset allocation may change from the Proposed Allocation over time.

** Due to rounding, total may not add up to 100%.

The portfolio includes all of the accounts included in the proposal. Refer to Your Proposed Portfolio for the list of accounts included in the proposal. See important disclosure information at the end of this document for an explanation of assumptions, limitations and methodologies.

| | Current | Proposed | Suggested Target |
|---------------------------|---------|----------|------------------|
| Cash | 8.8% | 5.8% | 2.0% |
| Equities | 46.4% | 47.8% | 44.0% |
| Fixed Income & Preferreds | 37.6% | 34.9% | 39.0% |
| Alternatives | 7.2% | 11.5% | 15.0% |

Portfolio Asset Allocation Summary (cont'd)

Portfolio Asset Allocation Current Vs. Proposed¹

| Asset Class | Current | | Proposed | | Change ² Current Vs. Proposed | |
|---|------------------|----------------|------------------|----------------|--|--------------|
| | Investment (\$) | % of Portfolio | Investment (\$) | % of Portfolio | Value (\$) | % Change |
| Fixed Income & Preferreds (cont'd) | 197,112 | 37.6 | 182,864 | 34.9 | (14,248) | (2.7) |
| Inflation Linked Secs | 2,305 | 0.4 | 2,252 | 0.4 | (52) | 0.0 |
| Inflation Linked Secs | 2,305 | 0.4 | 2,252 | 0.4 | (52) | 0.0 |
| High Yield Fixed Income | 2,148 | 0.4 | 2,252 | 0.4 | 105 | 0.0 |
| High Yield Fixed Income | 2,148 | 0.4 | 2,252 | 0.4 | 105 | 0.0 |
| Emerging Mkt Fixed Income | 2,043 | 0.4 | 2,252 | 0.4 | 210 | 0.0 |
| Emerging Mkt Fixed Income | 2,043 | 0.4 | 2,252 | 0.4 | 210 | 0.0 |
| Alternatives | 37,610 | 7.2 | 60,291 | 11.5 | 22,681 | 4.3 |
| Real Assets | 37,610 | 7.2 | 26,348 | 5.0 | (11,262) | (2.1) |
| Real Estate/REITs | 13,253 | 2.5 | 12,572 | 2.4 | (681) | (0.1) |
| Commodities | 24,357 | 4.7 | 13,776 | 2.6 | (10,581) | (2.0) |
| Equity/Hedge Assets | 0 | 0.0 | 33,943 | 6.5 | 33,943 | 6.5 |
| Eq. Hedge Assets-Other | 0 | 0.0 | 33,943 | 6.5 | 33,943 | 6.5 |
| TOTAL** | \$523,869 | 100.0% | \$523,817 | 100.0% | | |

| | Current | Proposed | Suggested Target |
|---------------------------|---------|----------|------------------|
| Cash | 8.8% | 5.8% | 2.0% |
| Equities | 46.4% | 47.8% | 44.0% |
| Fixed Income & Preferreds | 37.6% | 34.9% | 39.0% |
| Alternatives | 7.2% | 11.5% | 15.0% |

* Your actual asset allocation may change from the Proposed Allocation over time.

** Due to rounding, total may not add up to 100%.
The portfolio includes all of the accounts included in the proposal. Refer to Your Proposed Portfolio for the list of accounts included in the proposal. See important disclosure information at the end of this document for an explanation of assumptions, limitations and methodologies.

Section Three

Committee Reports

Page 32 through Page 50

Section Three

Committee Reports

| | |
|--|---------|
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| Handbook Committee | Page 37 |
| Color Guard Commander | Page 39 |
| Daughters of the American Revolution Liaison | Page 41 |
| Information Technology | Page 42 |
| Flag Committee Chairman | Page 43 |
| Compliance Committee Chairman | Page 44 |
| Public Service and Heroism Awards Chairman | Page 46 |
| George Washington Endowment Fund | Page 47 |
| America 250 Committee Co-Chairs | Page 49 |

California Society
Sons of the American Revolution
April 2021 – December 2021

Assistant Secretary – Barry Keys

At the Annual Spring Meeting in April 2021, then President Donald Littlefield, pathed the way for a committee to be formed to review the California Society Secretary's position to determine if an appointed position to work with the California Secretary should be appointed by the incoming president. In May 2021 a committee was formed of past secretary's and members of the executive committee to evaluate the duties of the California Society's State Secretary.

The President should appoint an assistant Secretary (a non-voting, non-elected officer) to assistant the Secretary. When the California Society State Secretary steps down, the assistant secretary will be in a position to run for secretary, if he desires to run for the position.

The committee defined the duties of the assistant secretary as follows.

1. The Assistant Secretary shall take charge of the "Change of Officers" reports each January to ensure that each chapter submits a Change of Officers Report after January 1st and before January 31st of the year as required by the state society.
2. From this report, the Assistant Secretary will create an excel spread sheet of all chapter officers with emails, he shall scan the Change of Officers reports and send to the technology chair to have the chapter officers changed on the CASSAR website.
3. The Assistant Secretary shall fill out the NSSAR Change of Officers forms found on the NSSAR web site and send them to the CASSAR Secretary by April 1st so the NSSAR website can be updated with the California Society officer changes.
4. The Assistant Secretary shall send out a notice to all chapter presidents and secretaries reminding them of the requirement to submit an Annual Chapter Report. He shall collect the reports and send to the California State Secretary no later than March 15th of each calendar year so they can be scanned for the Annual California Society Report.
5. The Assistant Secretary shall send an email to all CASSAR officer and committee chairs to obtain a report which will be forwarded to the California Society State Secretary no later than March 15th of each year to be included into the Annual California Society Report.
6. The Assistant Secretary shall collect, annually from each chapter president, the state executive committee, the trustees and committee chairs, a report for the Annual CASSAR Report. This report is required to be filed as part of our 501 C status and there is specific information that must be included in the Chapters report. The Assistant Secretary must contact the chapter, executive committee and committee chairs and get the reports no later than March 15th of each year.
7. The Assistant Secretary shall maintain an accurate email contact list of all of the chapter officers and send a copy to the executive board quarterly with all changes.

8. The Assistant Secretary shall provide the technology manager with updates to so the CASSAR web site will continue to be accurate. The
9. The Assistant Secretary shall have the responsibility to keep the information on the CASSAR web site current as it relates to the chapters and their officers.
10. The Assistant Secretary shall send a copy of national roster to each chapter so the chapter secretary can reconcile their membership each August. Each chapter must reconcile their rosters annually and they must compare their rosters against the Gold Standard, the NSSAR Roster.
11. The Assistant Secretary will be responsible to get each chapter a copy of their NSSAR Roster to the chapter secretary to reconcile the chapter information against the NSSAR Roster, if there are differences, the Assistant Secretary must notify the California Society Secretary so the NSSAR Data base can be changed before the annual reconciliation process begins in October.
12. The Assistant Secretary shall assist the California State Secretary in preparing chapter year-end reconciliation reports as required.
13. The Assistant Secretary shall work with the Credentials Committee (including the Executive VP, the President of the chapter hosting the meeting, and others deemed necessary) and contact the chapters to maintain a list of all eligible voters according to the CASSAR bylaws and ensure that all chapters have responded with delegates, chapter presidents/designees, etc. If chapters do not respond, the Credential committee shall contact the relevant vice presidents north/south to contact the chapter and get any missing information.
14. The information must be conveyed to the CASSAR State Secretary no later than 10 days before the meeting so a Quorum form can be prepared for the meeting and conveyed to the CASSAR President and Executive Vice President before the meeting.
15. The assistant Secretary shall work with the CASSAR Secretary to learn how the application process works.

A motion was taken at the annual Fall board of Managers meeting, and the position of Assistant Secretary was formalized and Barry Keys was appointed to the position.

**California Society Sons of the American Revolution
147th Annual Meeting
Audit Committee Report**

The CASSAR audit committee members were Executive VP Craig Anderson, Investment Fund Trustee Chairman Stephen Renouf, VP South Jim Klingler, VP North William Van Valkenburg, Treasurer John Ferris, Harbor Chapter President Dr. James Bunker, and Yosemite Chapter President Randy Dhindsa.

The committee met virtually during the week of March 28, 2022 and reviewed a random selection of records of the CASSAR Treasurer. All records examined were found satisfactory.

Craig Anderson
Chairman

Bylaws Committee

Date of Report: March 12, 2022

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 no proposals submitted for review.

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.

California Compatriot Report
April 2022

In May 2021, we began publishing the California Compatriot began monthly, using an email marketing platform, Constant Contact. Since using this platform, our newsletter publishing costs have decreased by nearly 60%, we are able to increase issues per year from 4 to 12 bringing more timely information to members and Friends of the SAR , and our publication is reaching over twice as many members. The industry open rate for this type of publication is 28%; the open rate for our newsletter is 60%. Another important benefit is that the publication does not require to be downloaded to a user's electronic device; it may be read on-line via a computer or any mobile device such as a tablet or smart phone.

We have been able to communicate events within our society on a much more current basis, insert links to external information that our members find important, link video content of SAR events, and advertise upcoming society and chapter events.

Craig Anderson
Editor 2021-2022

Handbook Committee

Date of Report: March 13, 2022

Submitted by: Chairman Derek Brown

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, on the "Members Section" Tab. If you select "About California SAR," you will see:

Articles of Incorporation (*Updated 11/23/21*)

Bylaws (*Updated 11/23/21*)

Whistleblower Policy

Conflict of Interest / Code of Organizational Conduct

List of the Presidents of the California SAR (*Updated 5/3/21*)

California Members Serving on National SAR Committees (*Updated 11/29/21*)

California SAR Speakers Bureau (*Updated 8/5/21*)

State and Chapter Officer Reference Manual (*Updated 1/3/22*)

The State/Chapter Officer Reference Manual has been up dated and placed on the website. A model disciplinary procedure is being developed at the National level by PG Tom Lawrence, Ray Wess and Greg Lucas; this will be reviewed and recommended at the Georgia Congress for adoption by all state Societies. This will be presented to the California Society for eventual inclusion into the CASSAR Bylaws and Officer Reference Manual.

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, 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

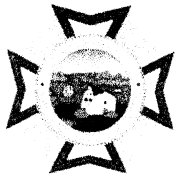
Conflict of Interest / Code of Organizational Conduct

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.



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

Reporting Period January 1, 2021 to December 31, 2021

| | |
|----------------|-------------------------------|
| Commander | Brandon Villardi |
| Adjutant North | Russ Kaiser (Senior Adjutant) |
| Adjutant South | Duncan Campbell |

The position of the Color Guard Commander of the California Society of the Sons of the American Revolution maintains the coordination point of the programs requiring and requesting participation of the Color Guardsmen.

Although many of our regular 2021 events had been cancelled, our California Color Guards were able to create new opportunities to represent the SAR. One of the most notable was by the San Diego Chapter, which hosted 8 separate wreath laying Memorial Day Events. One of the events was held aboard the USS Midway.

On November 6th, 2021, a change of command ceremony was held at the Fall Board of Managers Meeting located at the Mission Inn in Riverside, California. Commander Mark Kramer handed off command to his Adjutant South Brandon Villardi. The ceremony was presided over by President Brian Stephens.

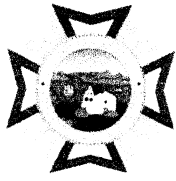
Duncan Campbell, Commander for the San Diego Chapter, has accepted the position of Adjutant South.

Annually, the Chapters report their members' participation in various events representing the Sons of the American Revolution. For 2021 we received reports from the following chapters:

- Coachella Valley
- Eagle
- Harbor
- Orange County
- Redwood Empire
- Riverside
- San Diego
- South Coast

Based on their 2021 membership, each chapter will be placed in one of the following categories/sizes Small, Medium, Large and Extra Large. Points have been tallied and awards will be presented at the Spring Board of Managers Meeting scheduled to be held in April 2022.

The CASSAR Color Guardsmen of the year has been selected and will also be announced during the Spring BOM in April 2022.



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

CASSAR Color Guard Inventory

- 1 x American Flag with flagpole
- 1 x SAR Flag with flagpole
- 1 x California Flag with Streamers with flagpole
- 3 x Flag Base
- 1x CASSAR Banner with PVC Frame
- 9x CASSAR Baron Von Steuben Medals Bronze (plus parts)
- 0x CASSAR Baron Von Steuben Medals Silver
- 6 x CASSAR Baron Von Steuben Medals Gold

Respectfully Submitted By

Brandon Villardi

CASSAR Color Guard Commander

CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT
03/15/2022
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. 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 NSSAR and CASSAR website and will soon be included with the on-line version of the new member application.

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 2020, California submitted 33 Finder Forms and placed 5th nationally. The Bakersfield Chapter DAR was the winner of the \$100 cash prize and Certificate of Appreciation for 15 referrals.

In 2021, the CASSAR received 7 DAR Finder Forms year to date, and no individual or Chapter qualified to receive the award.

Since this year's virtual CASSAR April meeting, I have attended the virtual DAR Continental Congress in June 2021, the Wreaths Across America mobile display hosted by the Luiseno Chapter DAR in Temecula on April 26, 2021, and the Butterfield Trail Chapter one year anniversary celebration meeting at the CASSAR Headquarters in Monrovia, CA on March 20, 2022. I also attended the NSSAR DAR Liaison Committee meeting at Fall Leadership.

Respectfully Submitted,
Brian Stephens,

The California Society of the Sons of the American Revolution

Information Technology Chairman Report Spring 2022

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

The website has undergone a significant redesign in 2022. The existing information structure was maintained as much as possible, including the recently organized Members Section, so everything should be easy to locate.

In addition to information about the California SAR and how to join SAR in general, we still have a feature to locate your nearest chapter and connect with the officers and website of those chapters.

There is now an easy-to-use chapter map where you can visually see where the chapters are located and click on them to get that chapter's contact information.

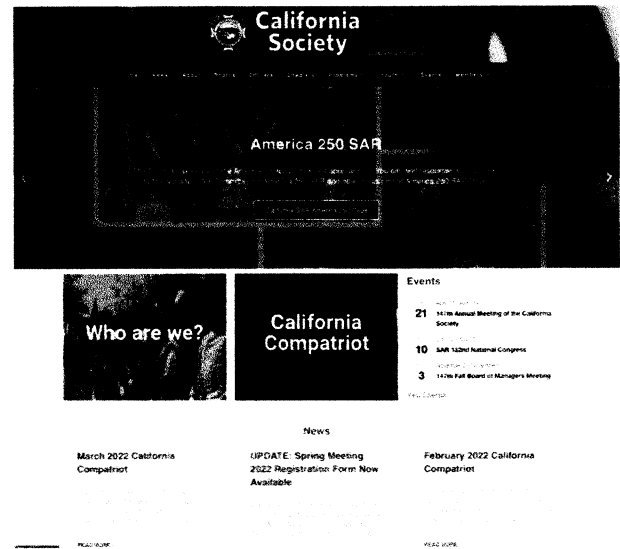
If your chapter information needs to be updated, or you believe a zip code lookup is in error, please notify Greg Hill.

The America 250 SAR Program is prominently featured as we move towards this important milestone date in American history. You will find updates and connections to national resources, as well as our society's video promoting our nation's semiquincentennial.

Our Community Awards are now described and illustrated along with information about honorees who received recognition at the California SAR state level.

Program Pages such as the Color Guard have also seen significant updates.

Updates and corrections to existing material and ideas for new content can always be submitted to Greg Hill at gjhill@mac.com



Gregory J Hill
California SAR Information Technology Chairman

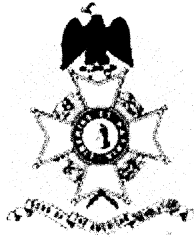
**CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION
FLAG COMMITTEE REPORT
March 25, 2022**

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 one 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 the 132nd Annual SAR National Congress in Savannah, Georgia is April 15th, 2022. This year there is a new award certificate for U.S. Flag Retirement.

| Chapter | Flag Display Certificates | Flag Retirement Certificates |
|---------------------------------|----------------------------------|-------------------------------------|
| CASSAR | 1 | |
| North | | |
| Delta | | |
| Gen. George Washington | | |
| Gold Country | | |
| Monterey Bay | | |
| Mother Lode | | |
| Redwood Empire | 1 | 6 |
| Sacramento | 1 | |
| San Francisco | | |
| Silicon Valley | | |
| Thomas Jefferson | 7 | |
| Yosemite | 5 | |
| South | | |
| Central Coast | 2 | |
| Coachella Valley | 3 | |
| Eagle | • | |
| Gen. George Patton | 1 | |
| Harbor | | |
| Kern County | 1 | 2 |
| Orange County | 1 | |
| Redlands | | |
| Riverside | 3 | |
| San Diego | 1 | |
| Santa Barbara | | |
| Sons of Liberty | | |
| South Coast | 1 | |
| Total Number of Chapters | 12 of 24 | 2 |

Respectfully Submitted,

Jim Klingler and William Van Valkenburg, Co-Chairmen
CASSAR Flag Committee



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



**Compliance Committee — 2021
Report for the 147th Annual Meeting**

Tax Filings

All California Chapters are required to make Federal and State tax filings. These filings include:

- **Internal Revenue Service:** Form 990-N (e-Postcard)
- **California Franchise Tax Board:** 199N California e-Postcard

California Attorney General's Registry of Charitable Trusts.

Chapters (unless specifically exempted in writing) are required to annually renew its registration with the **Registry of Charitable Trusts**, using Form RRF-1 and CT-TR-1, along with any applicable renewal fees. In addition, Chapters may be required to file a CT-1, CT-NRP-1, and CT-NPR-2. The failure to annually renew registration will lead to the charitable organization being listed as delinquent with the Registry of Charitable Trusts and may lead to the loss of tax exemption status with the Franchise Tax Board and IRS.

====

Guide for Charities – YouTube – Senior Assistant Attorney General Tania Ibanez

https://www.youtube.com/watch?v=BKt8JFHN-pw&list=PLZldm5UisZ7g-JGfwM4sv8PhZ44CpFW_E&index=5

Public Benefit Corporations

The majority of registered nonprofit corporations in California are organized as public benefit corporations.

“Is Our Organization a Charity?”

Many people contact the Attorney General's Registry of Charitable Trusts to ask if their organization is a charity. If the organization is classified as a California nonprofit public benefit corporation⁵ or has received federal tax exemption under **Internal Revenue Code section 501(c)(3)**, it is considered a charity.

The Law:

<https://law.justia.com/codes/california/2005/gov/12580-12599.7.html#:~:text=2005%20California%20Government%20Code%20Sections%2012580-12599.7%20Charitable%20Purposes,and%20commercial%20coventurers%2C%20over%20which%20the%20state%20>

California Society Sons of the American Revolution report of 2021 filings:

| Chapter | 990-N | 199N | SS-100 | CT-1 | RRF-1 | CT-TR-1 | NRP-1 | NRP-2 |
|-------------------------------|--------|--------|--------|--------|--------|---------|--------|--------|
| Butte Chapter | na | na | na | na | na | na | na | na |
| Central Coast Chapter | | | | | | | | |
| Coachella Valley Chapter | Filed | Filed | | Exempt | Exempt | Exempt | Exempt | Exempt |
| Delta Chapter | | | | | | | | |
| Eagle Chapter | | | | | | | | |
| Gen G. S. Patton, Jr. Chapter | | | | | | | | |
| Gen. G. Washington Chapter | Filed | Filed | Verbal | | Verbal | Verbal | | |
| Gold Country Chapter | Filed | Filed | | | Filed | Verbal | | |
| Harbor Chapter | Verbal | Verbal | | | | | | |
| Kern Chapter | Filed | Filed | | | | | | |
| Monterey Bay | Verbal | Verbal | | | | | | |
| Mother Lode Chapter | | | | | | | | |
| Orange County Chapter | | | | | | | | |
| Redding Chapter | na | na | na | na | na | na | na | na |
| Redlands Chapter | | | | | | | | |
| Redwood Empire Chapter | Verbal | Verbal | | | | | | |
| Riverside Chapter | Filed | Filed | | | Filed | Filed | | |
| Sacramento Chapter | Filed | Filed | | | | | | |
| San Diego Chapter | | | | | | | | |
| San Francisco Chapter | | | | | | | | |
| Santa Barbara Chapter | Verbal | Verbal | | | NR | NR | | |
| Silicon Valley Chapter | Filed | Filed | | | Filed | Filed | | |
| Sons of Liberty Chapter | Verbal | Verbal | Verbal | | Verbal | Verbal | | |
| South Coast Chapter | Filed | Filed | Filed | | Filed | Filed | | |
| Thomas Jefferson Chapter | Filed | Filed | | | Filed | Filed | | |
| Yosemite Chapter | Filed | Filed | Verbal | | NR | NR | | |

Codes:

IP = In Process

NR = No Record

Filed = Copies provided

Verbal = Chapter Officer stated it filed.

Follow-up emails sent 7/18/21

Respectfully submitted,
Donald B Littlefield
Compliance Committee Chairman 2021
California SAR

CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT
03/15/2022
PUBLIC SERVICE AND HEROISM COMMITTEE

In addition to serving as the CASSAR PS&H Chair, I have been attending the NSSAR PS&H Committee meetings at Spring and Fall Leadership for the past five years. With support from Vice-President General, Western District - Charles Smith, I was appointed as an official member of the Committee by President General - Davis Wright earlier this month.

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

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

At the April 2021 Annual meeting of the Membership the California Society presented a Heroism Award and a Law Enforcement Commendation to two Los Angeles County Sheriff Deputies.

At the November 2021 Board of Managers Meeting the California Society presented Heroism Award, Fire Service Commendation, and Emergency Medical Services Award.

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

Respectfully Submitted,
Brian Stephens

The California Society, Sons of the American Revolution

147th Annual Meeting; April 21 – 24, 2022

George Washington Endowment Fund Program Report

Becoming a George Washington Fellow

The National Society Sons of the American Revolution George Washington Endowment Fund (GWEF) Fundraising Committee is charged with conducting fundraising activities to help raise money for the George Washington Endowment Fund and in the recruitment of new George Washington Fellows. The committee designates George Washington Endowment Fund contacts at the state-level and recognizes new George Washington Fellows.

Becoming a George Washington Fellow is not limited to SAR members. Spouses, children, grandchildren, nephews, and nieces are all eligible. And once a George Washington Fellow, you are always listed as a George Washington Fellow. Your donation is a perpetual gift which never dies, it is working to support the SAR in perpetuity. All new George Washington Fellows receive a beautiful gold lapel pin, a certificate acknowledging their status as a GW Fellow, and their name is added to the list of all GW Fellows in the NSSAR Library.

Remember, 100% of your tax-deductible donation goes into a permanent restricted fund. Gifts may be made by cash, check, credit card, stocks, bonds, or any other financial assets that you may desire to contribute. All contributions are tax deductible to the extent allowed by law under section 501 (c)(J) of the Internal Revenue Code.

Awards

The Howard F. Horne Award is given annually to the State Society with the largest increase in new GW Fellows as a percentage of the State Society membership. The Walter Buchanan Meek Award is given annually to the State Society with the largest numerical increase in new GW Fellows. The

annual term of each award is from April 1 to the following March 31. The awards are presented at the Annual Congress.

The California Society was awarded the Walter Buchanan Meek Award in the April 1, 2019, to March 31, 2020, term. The California Society recruited thirty new GW Fellows during that term. California is on track to receive the Walter Buchanan Meek Award again during the current term (April 1, 2021, to March 31, 2022).

Purpose

The George Washington Endowment Fund (GWEF) was established by the Executive Committee and approved by the Trustees during the meeting of February 27, 1993. The fund was created to establish a permanent restricted fund, the income of which would provide annual funding for support of NSSAR unfunded and underfunded committees and special projects. The GWEF is managed by a GWEF Board with responsibility for oversight of all aspects of the George Washington Endowment Fund. The endowment fund has grown annually to continue support of approved NSSAR activities and projects. The corpus of the fund is never touched. Eighty percent of the earnings are withdrawn each year to support NSSAR projects with twenty percent being rolled back into the corpus each year. Earnings from the contributions over the years have helped to finance a wide variety of programs and projects. The current balance of the GWEF is 2.7 million dollars.

For more information, please contact the California Society GWEF point of contact, Program Administrator James C. Fosdyck at cassarlaux1776@outllok.com.

CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT
4/22/2022
America250 Committee

Since the last report there have been 2 Zoom Meetings of the Steering Committee.

Articles have appeared in the Compatriot December, January, February, March, and April.

Legislation has been introduced known as AB1600 that would create a California Seminiquincentennial commission (America250) with CASSAR a part of the Commission. Testimony on the value of such a commission has been given at a subcommittee hearing.

Appearances promoting America 250 SAR and discussing AB1600 have been made to DAR Mojave Chapter, Republican Women of Newport Harbor, US Naval Sea Cadets, Veterans at Levi Stadium, various CASSAR chapters, America Legion Riders (Chptr. 105), various DAR and SAR chapters.

Invitations to our America250 partner, the California Society of Colonial War, upcoming June luncheon have been sent out.

An America 250 SAR/CASSAR Challenge Coin has been designed. The first state society to do so.

There have been numerous Bronze Medals award from the Orange County, Harbor, Redwood, San Diego and Sacramento Chapters. There are 7 Silver Awards and 1 Gold Award being made at this meeting.

The CASSAR America250 Webpage is up and running.

The America 250 Minute has been admired by National and is on their website.

CASSAR has received national attention from the 250 Committee concerning its various activities and Compatriot newsletter.

At least 4 chapters are now employing the America250 Minute: San Diego, Harbor, Orange, and Riverside.

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. Approximately 450 1971-1984 CASSAR record copies remain to be entered.

All 24 CASSAR chapter's post 1984 record copies that are available in the PRS have been entered into the SAR PRS as Phase 1. CASSAR SAR PRS Phase 2 data entry has completed to update CASSAR unique Patriot Records in the SAR PRS. This work was coordinated by Jim Faulkinbury and Randy Dhindsa.

NSSAR Online Application Form Data Entry System use and implementation

During 2021-2022 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 19, 2022 and since the Fall of 2015, approximately 3,728 CASSAR applications have been started in the SAR Online Application System and approximately 1,577 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.

Section Four

Youth Activity Reports

Page 51 through Page 57

Section Four

Youth Activity Reports

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| Sea Cadet Program | Page 53 |
| Knight Essay Contest | Page 54 |
| ROTC/JROTC Program | Page 55 |
| Valley Forge Program | Page 56 |
| Spirit of America Program | Page 57 |



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 CASSAR 2021 Winner (NSSAR 2022 1st Place Winner)

John D. McPhie Orange County Chapter

2021 Participants - Chapters

Orange County – Redwood Empire Chapter – Harbor Chapter - South Coast

I attended and participated in all the NSSAR Eagle Scout Committee meetings in 2021.

Robert E. Burt Scout Volunteer Award

We did not have any Nominations in 2021

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.

New Youth Protection Requirements

New California State Law AB 506, which applies to all Youth Service Organizations in California, became effective January 1, 2022. AB 506 requires all youth organizations in California to collect Live Scan background checks and certificates of Mandated Reporter training, effective Jan. 1, 2022

If you are an active member of Scouts BSA, or are a Merit Badge Counselor, or if there is the slightest possibility of you spending more than 16 hours in a single year interacting with Scouts, you need to complete this training.

Here is the link to the Mandated Training:

[Volunteers | Child Abuse Mandated Reporter Training \(mandatedreporterca.com\)](https://mandatedreporterca.com)

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
707-235-1900



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 Report

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. Here is the criterion listed in the Awards Manual for the Sea Cadets:

Current CASSAR NSCC/NLCC Recognition Program

CASSAR Chapter currently award the approved Sea Cadet Ribbon and Bronze Good Citizenship Medal



This is a very worthwhile program and allows us to meet some of the finest young people working towards a career in the military. The web link to locate the nearest unit to a specific CASSAR Chapter is <http://homeport.seacadets.org/secure/UnitDirectory.aspx>

CASSAR Sea Cadet of the Year 2022 - PO2 Lina A. Vo

UNIT: Chief (MCM 14) Division, San Diego Sponsor: SAR San Diego Chapter

Basic Criteria included:

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

New California Youth Protection Requirements

New California State Law AB 506, which applies to all Youth Service Organizations in California, became effective January 1, 2022. AB 506 requires all youth organizations in California to collect Live Scan background checks and certificates of Mandated Reporter training, effective Jan. 1, 2022

If you are an active member of a NCSS/NLCC Unit, or if there is the slightest possibility of you spending more than 16 hours in a single year interacting with Sea Cadets, you may need to complete this training.

Here is the link to the Mandated Training:

[Volunteers | Child Abuse Mandated Reporter Training \(mandatedreporterca.com\)](http://mandatedreporterca.com)

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

2021-2022 George S. & Stella M. Knight Essay Contest

California Society, Sons of the American Revolution

Officer's Report

Submitted By: Patrick Cecil, CFP®, Ph.D.

1 March 2022

Entries Received

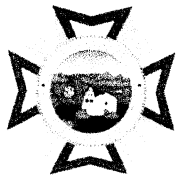
- Four chapters submitted entries to the Knight Essay Contest State Chair. They are as follows:
 - o Orange County Chapter
 - o Redlands Chapter
 - o Sons of Liberty Chapter
 - o Thomas Jefferson Chapter
- The State Chair also received two submissions from individuals.

Disqualified Entries

- Of the four chapter entries and two individual entries submitted to the State Chair, two were disqualified for failing to adhere to the essay rules.

Winning Essay and Chapter

- The judging committee, comprised of three members, voted Neha Vijay of Loma Linda, CA as the winner for the 2021-2022 Knight Essay Contest. Ms. Vijay is sponsored by the Redlands Chapter. Her essay is entitled: "The Pen Behind the Sword."



California Society
Sons of the American Revolution
JROTC / ROTC Annual Report



Reporting Date January 1, 2021 to December 31, 2021

Chairman: Brandon Villardi

For the 2021-2022 JROTC Enhanced Award Program we received nominations from the following chapters.

Orange County
Redwood Empire
Sacramento
San Diego

The 2021-2022 CASSAR JROTC Enhanced program winner is AFJROTC Cadet **Daniela Blanco Gonzalez** from Buena Park High School nominated by the Orange County Chapter.

Daniela Blanco Gonzalez, and her team will be competing at the AirForce StellarXplorers National Finals, held in Houston, TX 20th to 24th April and will be unable to attend the Spring BOM to receive her award. We are currently scheduled to present the state medal and cash award to Cadet Gonzalez at the Buena Park High School's Awards Program scheduled for Tuesday, April 26th @ 5:30 PM in the School Theater

The Completed nomination packet has been submitted to NSSAR JROTC Judging Committee on March 17th 2022.

CASSAR Enhanced JROTC Program 2022/2023:

Deadline for chapter submission to CASSAR is February 1st 2023.

CASSAR Award Level for year 2023

1st place \$1,000

NSSAR Award level for year 2022/2023

Submission deadline to NSSAR is May 1st, 2023

1st place \$5,000 (plus \$1,500 travel expense);

2nd place \$2,000;

3rd place \$1,000;

4th & 5th place \$250

CASSAR JROTC/ROTC Medal Inventory

5 x Bronze ROTC Metal with Ribbon

5 x Bronze ROTC Certificates

10 x Silver ROTC Metal with Ribbon

10x Silver ROTC Certificates

15 x Presentation Folder

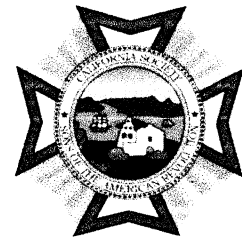
Respectfully Submitted By

Brandon Villardi

CASSAR JROTC/ROTC Chairman



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



Valley Forge Teacher Recognition Program
Annual Report for 1 January to 31 December 2021

As reported last year and agreed to by the Freedom Foundation Valley Forge administration, the two applicants who attended virtual sessions in 2020 were allowed to participate in the 2021 FFVF program at no additional cost to CASSAR. This opened up the opportunity for two additional teachers to participate; however, no applications were submitted to join the 2020 applicants. The program was offered twice (27 June – 2 July and 18-23 July). Unfortunately, one of the two teachers was unable to attend due to family commitments. The two teachers eligible to attend this year's FFVF program were:

Ms. Janey Moffitt, Rocklin Academy Meyers, Rocklin, sponsored by **Sacramento** Chapter (attended the 18-23 July session and provided an enthusiastic report at the Fall CASSAR meeting).

Ms. Hallie Vae Wallace, Oak Chan Elementary School, Folsom, sponsored by **Sacramento** Chapter (did not attend).

The 2021 Program, titled “American Revolution – Philadelphia Campaign”, included stops at historic sites in Philadelphia and New Jersey, including:

| | |
|---|---|
| Independence Hall & the Liberty Bell | Brandywine Battlefield and Battle of Clouds |
| Gen Anthony Wayne's grave | Washington's Crossing |
| Nassau Hall & Princeton Battlefield | Franklin Post Office & Betsy Ross House |
| Birmingham Friends Meeting House | Peter Wentz Farmstead & Cliveden House |
| Valley Forge National Historical Park | Monmouth Battlefield |
| Fort Mifflin & National Constitution Center | Paoli Massacre Site |
| Christ Church & Burial Ground | Augustus Lutheran Church & Evacuation |
| Morristown/Jockeytown & Museum of the American Revolution | |

The 2022 program will be modeled after previous “American Revolution – North” programs, although the title may change. The dates will be 2-7 July 2022 with the honorees flying into Philadelphia on 2 July and flying out of Boston on 7 July. Confirmation of the actual sites to be visited is still being finalized, but previous sites visited included the following:

| | |
|----------------------------------|----------------------------------|
| South Meeting House | Bunker Hill Memorial & Museum |
| Old North Church | Old State House & Freedom Trail |
| USS Constitution (Old Ironsides) | Faneuil Hall & Paul Revere House |
| Lexington & Concord | Minuteman National Historic Park |
| Oriskany Battlefield | Fort Stanwix & Johnson Hall |

Regarding COVID-19 restrictions, the following was recently issued by FFVF:

Updated Covid-19 Policy

As of April 1, 2022, Freedoms Foundation at Valley Forge will no longer require program participants to be vaccinated. We continue to recommend vaccination as an act of civic responsibility, and Foundation staff are fully vaccinated and boosted.

Recently, surrounding communities – including Philadelphia where most participants visit during their time with FFVF – have suspended mask and vaccine mandates. As the CDC projects the continued decline of both the rates of infection and hospitalization, we hope to open up all student and teacher programs to the widest group possible and return safely to normal programming.

Individuals and groups that are planning to take part in educational programs after April 1st will no longer be required to show vaccination status or negative test nor be masked for the duration of the program.

FFVF reserves the right to review this policy should there be a change in conditions here locally, but will find ways to accommodate those whose travel arrangements have been booked previously.

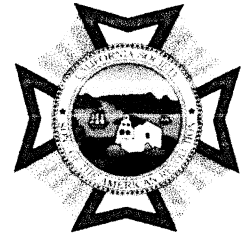
Respectfully submitted

Robert L. Taylor

Valley Forge Teacher Recognition Program Chairman



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



Spirit of America Award Program
Annual Report for 1 January to 31 December 2021

Due to the COVID pandemic restrictions, the General George S. Patton, Jr. Chapter was unable to personally present awards at the graduation ceremonies for the five middle schools in the Camarillo Pleasant Valley School District. However, the Chapter provided two bronze Good Citizenship medals and eight Outstanding Citizenship pins with certificates for presentation to ten deserving student graduates from these schools. The awards and certificates were presented 16 June 2021 at the schools' virtual graduation ceremonies. Honorees were:

Santa Rosa Technology Magnet

Girl: Morgan Wilkinson (Outstanding Citizenship pin & certificate)

Boy: Joshua McBride (Bronze Good Citizenship medal & certificate)

Pleasant Valley School of Engineering and Arts

Girl: Sayleen Rosales (Bronze Good Citizenship medal & certificate)

Girl: Benjamin Gertler (Outstanding Citizenship pin & certificate)

Monte Vista Middle School

Girl: Janelle Maree Siles (Outstanding Citizenship pin & certificate)

Boy: Bransyn Myrow (Outstanding Citizenship pin & certificate)

Las Colinas Middle School

Girl: Camille Crowell (Outstanding Citizenship pin & certificate)

Boy: Lennon Fausset (Outstanding Citizenship pin & certificate)

Los Primeros School of Science and Art

Girl: Brooktawit Abate (Bronze Good Citizenship medal & certificate)

Boy: Peyton Moise (Outstanding Citizenship pin & certificate)

Apart from the General George S. Patton, Jr. Chapter, no other chapters reported participation in the program; however, Mother Lode Chapter (Tom Adams) has submitted a proposal to the program that merits further review and possible inclusion in the current program.

Respectfully submitted

Robert L. Taylor

Spirit of America Award Program Chairman