

California Society Annual Report

April 2024

" The Book "

Prepared By
Christopher J. Cerillo
California Society-
SAR State Secretary

Index

Section One

President's Report
Executive Vice President
Vice President - North
Vice President - South
Vice President
Membership Secretary
Treasurer
Registrar
Chancellor
Geologist
Historian
Chaplin
Surgeon
Investment Fund Trustee
Past President

Section Two

Trustee Report
Treasurers Report

Section Three

Committee Report
Sea Cadet Program
America 250 Handbook
Committe
Public Service Committee /
Nominatting Committee
DAR Liaison Committe
Youth Report
Knight Essey
Middle School Brochure
Contest
Spirit of America Award
Valley Forge Teachers
Program
Eagle Scout Program

Section Four - Chapter Reports

| | |
|-----------------------------------|-----------|
| Central Coast | No Report |
| Coachella Valley | Page 40 |
| Delta Chapter | Page 42 |
| Eagle Chapter | Page 44 |
| General George Patton Chapter | Page 46 |
| General George Washington Chapter | Page 49 |
| Gold Country Chapter | Page 50 |
| Harbor Chapter | Page 51 |
| Monterey Bay Chapter | Page 53 |
| Mother Load Chapter | Page 55 |
| Orange County Chapter | No Report |
| Redlands Chapter | Page 56 |
| Redwood Chapter | No Report |
| Riverside Chapter | No Report |
| Sacramento Chapter | Page 58 |
| San Diego Chapter | Page 59 |
| San Francisco Chapter | No Report |
| Santa Barbara Chapter | Page 60 |
| Silicon Valley Chapter | Page 63 |
| Sons of Liberty Chapter | No Report |
| South Coast Chapter | Page 65 |
| Thomas Jefferson Chapter | Page 67 |
| Yosemite Chapter | Page 74 |

" The Book "

California Society Annual Report

Section One

Elected Officers
Reports

Pages 1 to 22



**The California Society of the
Sons of the American Revolution
OFFICER'S REPORT**

Jim Klingler

**State Society President and National Trustee
149th Annual Meeting
April 26-27, 2024**

My thanks to the members of the California Society of the Sons of the American Revolution for your support during the past year during my final term as State Society President, and my term as National Trustee.

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

California Society SAR:

- Planned and presided over the CASSAR Annual Meeting of the Membership held on April 13-15, 2023.
- Attended and spoke at Memorial Service for Compatriot James Fosdyck on May 7, 2023.
- Assisted CASSAR Treasurer in completing the filing of the CASSAR 2022 federal and state tax returns by the due date of May 15, 2023.
- Organized CASSAR lunch meeting to present Un Hui Yi with the Daughters of Liberty medal from PG Bruce Pickette on July 27, 2023.
- Attended Memorial Service for Compatriot Phillip Hinshaw on August 26, 2023.
- Planned and presided over the CASSAR Board of Managers Meeting at the Queen Mary Hotel in Long Beach, CA from November 2-4, 2023.
- Attended joint SAR, DAR and CAR reenactment and commemoration of the Boston Tea Party on December 16, 2023.
- Attended and spoke at the joint SAR, DAR and CAR dinner celebrating President George Washington's Birthday on February 24, 2024.
- Presented remarks at the Annual State Conference of the California State Society of the Daughters of the American Revolution at the San Ramon Marriott Hotel in San Ramon, CA on March 14, 2024.
- Planned agendas for the CASSAR Annual Meeting of the Membership to be held on April 26-27, 2024.

California Society SAR Chapters:

- Attended Orange County Chapter meeting on May 13, 2023.

- Attended Sons of Liberty Chapter meeting and installed CASSAR Genealogist David Morrow on May 20, 2023.
- Attended Coachella Valley Chapter meeting and participated in Remembrance of Compatriot David Grinnell on May 19, 2023.
- Participated in the joint SAR Color Guard event for Memorial Day at the Orange County Cemetery in Santa Ana on May 29, 2023.
- Participated in the joint SAR Color Guard event for the Huntington Beach Independence Day parade in Huntington Beach on July 4, 2023. The SAR Color Guard and America 250 was mentioned in the live coverage on ABC television.
- 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, 2023.
- Attended Eagle Chapter meeting on August 5, 2023.
- Attended Harbor Chapter meeting on August 10, 2023.
- Attended Orange County Chapter meeting on September 9, 2023.
- Attended Orange County Chapter meeting on November 11, 2023, and assisted in the induction of the McPhie family as SAR members.

National Society SAR:

- Attended the 133rd SAR Congress in Orlando, FL from July 14-20, 2023, where I headed the California Society SAR delegation to Congress.
- Attended the SAR Fall Leadership Meeting in Louisville, KY from September 21-23, 2023. I served as Co-Chair of the Finance, Budget, and Investment Committee meeting on September 22, 2023, and attended the EXCOM meetings on September 21 and September 23, and the Trustees meeting on September 23, 2024. I also attended the Investment Committee meeting with Fifth Third Bank, the Museum Board meeting and the Strategic Planning Committee meeting.
- Attended the SAR Spring Leadership Meeting in Louisville, KY from February 29 - March 2, 2024. I served as Co-Chair of the Finance, Budget, and Investment Committee meeting on March 1, 2024, and attended the EXCOM meetings on February 29 and March 2, and the Trustees meeting on March 2, 2024. I also served as Chairman of the Investment Committee meeting with Fifth Third Bank, and attended the Museum Board meeting, the Foundation Board meeting and the Strategic Planning Committee meeting.
- As Chairman of the SAR Finance committee, I conducted a virtual Zoom meeting with the Finance committee on May 22, 2023 to review the Form 990's for SAR and the SAR Foundation.
- As Vice Chairman of the SAR Investment Committee, I participated in virtual meetings of the committee with Fifth Third Bank on May 25, 2023 and September 6, 2023 to discuss the investment allocation strategy for the SAR and SAR Foundation funds. Also, I presided in a virtual meeting of the committee on January 30, 2024 to discuss the investment fund performance and the proposed investment allocation which I presented to EXCOM and the Trustees at the Spring Leadership Meeting.
- Participated in a virtual meeting of SAR Trustees on January 13, 2024.

- Participated as a member of the SAR Executive Committee in virtual meetings on April 19, May 24, June 15, June 22, July 5, August 23, and November 29, 2023, and January 4 and January 24, 2024.
- Participated as a member of the SAR Nominating Committee in a meeting to interview SAR Officer Candidates on September 21, 2023 and March 2, 2024.
- Participated as a member of the SAR Museum Board in virtual meetings on May 3, June 7, August 2, October 11, and December 5, 2023.
- Participated as a member of the SAR Strategic Planning Committee in virtual meetings on August 30, October 24, November 6, November 20, December 18, 2023 and January 18, February 13, and March 19, 2024.

Respectfully Submitted,

Jim Klingler

Klingler@sbcglobal.net

Phone: (949) 854-7698

Cell: (949) 300-3253



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



Executive Vice President 2023-24

**Report for the 149th Annual Meeting
Hyatt Regency SFO, Burlingame, CA**

CASSAR Annual Meeting — Costa Mesa — April, 2023
CASSAR Board of Managers Meeting — Long Beach — November 3-4, 2023
CASSAR Executive Committee Meeting — May 2023
CASSAR Budget Committee Meetings — October 2023
CASSAR Audit Committee — March 2024
CASSAR Hyatt SFO Hotel Visit — Burlingame — October 27, 2023
CASSAR Restaurant Tours — Burlingame — October 27, 2023

Chapter Meetings:

Sacramento Chapter — 2 monthly meetings and 2 All-Hands Meeting, 2023
Sacramento Chapter — 2 monthly meetings and 1 All-Hands Meeting, 2024
Sacramento Chapter — 2 Executive Committee Meetings, 2024
Sacramento Chapter — SAR/DAR Picnic — June, 2023
Delta Chapter — November 18, 2023
Gold Country Chapter, — Auburn — October, 2023
Gold Country Chapter, — Auburn — March 16, 2024
Mother Lode Chapter — Folsom Mayor - Flag Certificate Presentation — April, 2023
Mother Lode Chapter — Zoom — May, 2023
Mother Lode Chapter — Cameron Park — September, 2023
Mother Lode Chapter — Cameron Park — November 28, 2023
Mother Lode Chapter — Cameron Park — January 23, 2024
Mother Lode Chapter — Cameron Park — February 27, 2024
Mother Lode Chapter — Community Awards Banquet — October, 2023
Redwood Empire Chapter — Lifesaving Awards to Friedman Hardware — June 15, 2023
Riverside Chapter — Christmas Party — December 19, 2023
San Francisco Chapter — San Francisco — October, 2023
San Francisco Chapter — San Francisco — February, 2023
Thomas Jefferson Chapter — Concord — September, 2023
Thomas Jefferson Chapter — Concord — March 16, 2024

California Compatriot:

Published 12 monthly editions of the Compatriot
2023 Annual SAR Congress Edition
2023 John Dodd Inaugural Speech Edition
2023 CASSAR BOM Edition
Jim Fosdyck Memorial Edition

I also participated in the following events:

America 250 Events:

Green Valley Elementary, Rescue — 1776 Books, Uniform, Preso — March 6, 2024, 2 classes
SJ Galardo Elementary, Folsom — 1776 Books, Uniform, Preso — March 1, 2024, 3 Classrooms

Americanism Poster Contest Awards Ceremonies:

Gold Ridge Elementary, Folsom — Awards — 1 Classroom
Green Valley Elementary, Rescue — Awards — 3 Classrooms
Oak Chan Elementary, Folsom — Awards — 3 Classrooms
Sandra J Gallardo Elementary, Folsom — Awards — 3 Classrooms

JROTC

Caso Robles High School — Awards Presentations — May, 2023
Luther Burbank High School — Awards Presentations — May, 2023
McClatchy High School — Awards Presentations — May, 2023

Color Guard Events:

Folsom Hometown Parade, Folsom — June 24, 2023
Carmichael Elks 4th of July Parade — Carmichael — July 4, 2023
Constitution Day Celebration, Folsom — September 11, 2023
Folsom Veterans Day Parade, Folsom — November 11, 2023
Dollar General 1776 Book Challenge — November 20, 2023
Wreaths Across America Kickoff, CA State Capitol — December 11, 2023
Folsom City Council, WAA Proclamation for DAR — December 12, 2023
Wreaths Across America, Folsom VFW — December 12, 2023
US Coast Guard Auxiliary Changing of the Guard — January 13, 2024
Freedoms Foundation — March 02, 2024

Keynote Speaker – Chief Solano Chapter DAR — January 20, 2024

Joint Sponsored Events

American Heritage Partners — Speaker Series, Sacramento — April, 2023
American Heritage Partners — Speaker Series, Reno — August, 2023

23 Chapter Meetings or Events including Delta, Gold Country, Mother Lode, Riverside, San Francisco, and Thomas Jefferson.

Jim Fosdyck Memorial Service

17 Uniformed Color Guard, Public, and School Events.

1 Keynote Speaking event

2 Joint Sponsored events with American Heritage Partners

3 JROTC Medal Award Ceremonies

10 Poster Contest Award Visits

5 Classroom 1776 Book Challenge Book deliveries and talks

12 Issues of the California Compatriot plus 4 special editions

Plus Committee Meetings:

Executive Committee

Compliance Committee

Budget Committee

Audit Committee

Bylaws Committee

Respectfully,

Donald B Littlefield

Executive Vice President 2023-2024

California SAR

April 1, 2023



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

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

April 1, 2024

149th Spring Annual Meeting

Vice President, South Report

Compatriots, once again it has been a fun filled year. Thank you to all who have welcomed me to your chapter meetings. Your hospitality has been appreciated and enjoyed. The work you do is the backbone of our organization. I look forward to another exciting year visiting as many as I can and celebrating with you all in this 250th Anniversary period known as the Decade of the American Revolution!

The following is an account of the meetings and events I participated in this past year:

Southern California Chapter Meetings

| | |
|---------|---------------------|
| Apr 13 | Harbor |
| May 13 | Orange County |
| June 3 | Eagle |
| June 8 | Harbor |
| June 9 | Gen George S Patton |
| June 10 | Orange County |
| Sept 9 | Orange County |
| Nov 11 | Orange County |
| Dec 2 | Eagle |
| Dec 19 | Riverside |
| Jan 6 | Eagle |
| Jan 11 | Harbor |
| Jan 13 | Orange County |
| Jan 16 | South Coast |
| Jan 17 | Riverside |
| Jan 19 | Coachella |
| Feb 8 | Harbor |
| Feb 10 | Orange County |
| Feb 17 | Redlands |
| Feb 24 | San Diego |

California State Meetings

| | |
|-----------|---|
| Apr 14-15 | CASSAR 148 th Annual Meeting |
| Nov 3-4 | CASSAR 148 th BOM Meeting |
| Dec 6 | Genealogy Updates, David Morrow |

National Meetings

| | |
|-----------|--|
| May 23 | Maintenance Committee Meeting |
| Jun 8 | Audit Committee |
| Jul 14-20 | Congress: America 250, Color Guard, Audit, Maintenance |
| Aug 24 | Maintenance Committee |
| Aug 25 | Audit Committee |

| | |
|--------|--|
| Nov 30 | Communications and Affiliated Committees |
| Dec 5 | Communications and Affiliated Committees |
| Dec 13 | Communications and Affiliated Committees |
| Dec 21 | Communications and Affiliated Committees |
| Jan 22 | Audit Committee |
| Jan 30 | Communications and Affiliated Committees |
| Feb 1 | Branding Committee |
| Mar 1 | Leadership: America 250, Communications, Maintenance |

Color Guard Participation

| | |
|-----------|---|
| May 6 | Orange May Parade |
| May 9 | Fosdyck Internment, Riverside National Cemetery |
| May 27 | Memorial Day, Riverside National Cemetery |
| May 29 | Memorial Day, Santa Ana Cemetery |
| Jun 1 | Prado Dam Photo Shoot |
| Jun 14 | RSM Flag Retirement Ceremony |
| Jul 4 | Lake Forest Parade |
| Jul 14-20 | Congress, Orlando, FL |
| Nov 3-4 | CASSAR 148 th BOM Meeting |
| Nov 9 | Veterans Day, Covenant Christian School |
| Nov 10 | Veterans Day, Riverside (Musket firing) |
| Dec 16 | Wreaths Across America |
| Dec 16 | Boston Tea Party, San Diego |
| Feb 18 | Massing of the Colors |
| Feb 24 | DAR District 13 meeting |
| Feb 24 | SD Chapter G Washington Dinner (Musket firing) |
| Mar 3 | Andrew Jackson Hermitage Ceremony |

CAR Chapter Meetings

| | |
|--------|------------------|
| Aug 13 | Lt Nixon Chapter |
| Mar 9 | Temecula Creek |

Flag Certificates

As Vice President overseeing the flag certificate program for California SAR, the Society gave out over 100 flag certificates with 14 chapters participating. The Admiral-William-R.-Furlong-Memorial-Award-Form was submitted in early March to the national chairman.

Respectfully submitted,



John R Ferris
Vice President, South
California SAR



TRUSTEES of the CASSAR INVESTED FUNDS

CASSAR Board of Managers Meeting

April 23, 2024

The elected Trustees of the CASSAR Invested Funds are Chairman Stephen R. Renouf (2023-2026), John L. Dodd (2021-2024), and M. Kent Gregory (2022-2025). 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, 2023:
\$495,031.85.

The ending value of the Invested Fund on February 28, 2024:
\$519,232.88.

During the 12-month period described above, the total funds in the accounts increased by **\$24,201.03**. The increase was due to net realized and unrealized gains of \$49,201.03 due to a strong stock market in 2023, less \$25,000 withdrawn for donation to the SAR Foundation.

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 March 31, 2024:

| | | |
|---------------------------------|----------------------------|---------------|
| <u>LIFE MEMBER FUND:</u> | <u>\$202,872.82</u> | |
| Cash | \$11,827.02 | 5.83% |
| Equities | \$107,260.02 | 52.87% |
| Fixed Income | \$63,635.96 | 31.37% |
| Alternatives | \$20,149.82 | 9.93% |

Return: 11.28% Last 12 Months; 3.30% Since Inception (on 6/22/2004)

| | |
|---------------------------|--------|
| Allocations on 3/31/2024: | ACTUAL |
| Cash | |
| Global Cash | 5.83% |
| Equities | |
| US Large Cap Growth | 15.68% |
| US Large Cap Value | 14.66% |
| US Small Cap Growth | 5.29% |
| US Large Cap Value | 5.29% |
| International Equities | 7.96% |
| Emerging Markets Equities | 4.00% |
| Fixed Income | |
| Short Term Fixed Income | 22.41% |
| US Taxable Core | 8.94% |
| Other | |
| REITs | 1.94% |
| Commodities | 2.94% |
| Equity Return Assets | 5.06% |

Account Risk Profile: **4** (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 March 31, 2024:

| | | |
|------------------------|---------------------|---------------|
| EDUCATION FUND: | \$110,207.41 | |
| Cash | \$6,068.82 | 5.51% |
| Equities | \$51,829.52 | 47.03% |
| Fixed Income | \$39,930.64 | 36.23% |
| Alternatives | \$12,378.43 | 11.23% |

Return: 10.99% Last 12 Months; 5.16% Since Inception (on 10/4/2010)

| | |
|---------------------------|--------|
| Allocations on 3/31/2024: | ACTUAL |
| Cash | |
| Global Cash | 5.51% |
| Equities | |
| US Large Cap Growth | 14.43% |
| US Large Cap Value | 13.38% |
| US Small Cap Growth | 2.58% |
| US Small Cap Value | 6.69% |
| International Equities | 6.99% |
| Emerging Markets Equities | 2.97% |
| Fixed Income | |
| Short Term Fixed Income | 22.86% |
| US Taxable Core | 13.36% |
| Other | |
| REITs | 1.92% |
| Commodities | 4.30% |
| Equity Return Assets | 5.01% |

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

PERMANENT FUND

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

Fund Investment as of March 31, 2024:

| | | |
|-------------------------------|---------------------|--------|
| <u>PERMANENT FUND:</u> | \$126,436.99 | |
| Cash | \$5,353.13 | 4.23% |
| Equities | \$79,961.54 | 63.25% |
| Fixed Income | \$25,669.83 | 20.30% |
| Alternatives | \$15,452.49 | 12.22% |

Return: 12.95% Last 12 Months; 6.29% Since Inception (on 10/6/2010)

| | |
|---------------------------|--------|
| Allocations on 3/31/2024: | ACTUAL |
| Cash | |
| Global Cash | 4.23% |
| Equities | |
| US Large Cap Growth | 18.78% |
| US Large Cap Value | 17.36% |
| US Small Cap Growth | 2.45% |
| US Small Cap Value | 7.19% |
| International Equities | 13.56% |
| Emerging Markets Equities | 3.90% |
| Fixed Income | |
| Short Term Fixed Income | 14.04% |
| US Taxable Core | 6.26% |
| Other | |
| REITs | 4.40% |
| Commodities | 3.88% |
| Equity Return Assets | 3.95% |

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 March 31, 2024:

| | | |
|------------------------------|--------------------|--------|
| <u>CONGRESS FUND:</u> | \$30,575.71 | |
| Cash | \$1,386.65 | 4.54% |
| Equities | \$18,945.45 | 61.95% |
| Fixed Income | \$5,747.57 | 18.80% |
| Alternatives | \$4,496.04 | 14.71% |

Return: 12.50% Last 12 Months; 6.49% Since Inception (on 11/22/2019)

| | |
|---------------------------|--------|
| Allocations on 3/31/2024: | ACTUAL |
| Cash | |
| Global Cash | 4.54% |
| Equities | |
| US Large Cap Growth | 17.73% |
| US Large Cap Value | 16.94% |
| US Small Cap Growth | 2.54% |
| US Small Cap Value | 7.59% |
| International Equities | 13.45% |
| Emerging Markets Equities | 3.71% |
| Fixed Income | |
| Short Term Fixed Income | 13.50% |
| US Taxable Core | 5.29% |
| Other | |
| REITs | 4.73% |
| Commodities | 5.05% |
| Equity Return Assets | 4.93% |

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 March 31, 2024:

| | | |
|---------------------------------|--------------------|---------------|
| <u>UNALLOCATED FUND:</u> | \$61,395.66 | |
| Cash | \$6,463.74 | 10.53% |
| Equities | \$18,884.54 | 30.76% |
| Fixed Income | \$28,154.67 | 45.85% |
| Alternatives | \$7,892.71 | 12.86% |

Return: 7.00% Last 12 Months; 2.93% Since Inception (on 7/14/2015)

| | |
|---------------------------------|--------|
| Allocations on 3/31/2024: | ACTUAL |
| Cash | |
| Global Cash | 10.53% |
| Equities | |
| US Large Cap Growth | 7.69% |
| US Large Cap Value | 7.13% |
| US Mid Cap Growth | 1.15% |
| US Mid Cap Value | 1.20% |
| US Small Cap Growth | 1.27% |
| US Small Cap Value | 1.04% |
| International Equities | 8.21% |
| Emerging Markets Equities | 3.07% |
| Fixed Income | |
| Short Term Fixed Income | 20.05% |
| US Taxable Core | 15.22% |
| International Core Fixed Income | 4.77% |
| Inflation Linked Securities | 1.90% |
| High Yield Fixed Income | 1.93% |
| Emerging Market Fixed Income | 1.99% |
| Other | |
| REITs | 0.00% |
| Commodities | 0.00% |
| Equity Return Assets | 12.86% |

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

RECENT ACTIVITY.

The CASSAR Annual Meeting in April 2023 approved changing from short-term to intermediate and long-term bonds when the time was right to take advantage of the higher rates, and the Advisor will contact the Trustees to make the change when the yield curve flattens.

On April 5, 2024, the Morgan Stanley Advisor reported: *“Looking at the performance, 4th Quarter of 2023, and the 1st Quarter of 2024 was good, as the report shows. At this time, I am not recommending any changes to the allocation. As we discussed last year, the portfolios are overweight short-term bonds vs. intermediate/long term bonds. During 2023, and into the new year, the yield curve has remained persistently inverted. While in the long run, I would like to make the changes to the fixed income allocations that were approved by the board last year, it does not make sense to me to increase the risk in the portfolios by adding duration to the fixed income allocations, when the shorter term bonds are paying us higher yields. I will be in touch with the trustees at the end of this month to schedule a call to review these portfolios.”*

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
2023-2026

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

S/
M. Kent Gregory
Trustee
2022-2025

***California Society State
Secretary's Annual Report
January 1, 2022 - December 31, 2023***

As the California State Society Secretary, The Year of 2023 was met with a lot of challenges resulting in great success. The State saw gains in membership, as other States saw losses. California started with 1,616 members and gained 10 New Members; making the Total Active Membership for 2023 at 1,626.

During 2023, the state secretary processed a total of 328 different transactions which brought the state's total membership to 1,626 members. By December 31, 2023. The state had six (6) members transfer into the state, and nine (9) members transfer out of the state. The state had Thirty Three (33) members pass in 2023 with Twenty-Nine (29) active members reported. The state society had fifty-four (54) members reinstate their membership for the year. New membership applications processed were One Hundred Twenty-Five (125) for the Year of 2023.

The National by-laws state that all States must submit their annual reconciliation reports on or before January 31st of each year. The by-laws of the California Society state that chapters should stop collecting dues on December 15th of each year and submit their chapter Reconciliation Reports on or before January 5th to give the California Society Secretary an ample time to comply with the national requirements. Please keep this in mind when submitting your reports in a timely manner to avoid the possibility of your Chapter of being Dropped.

Due to unauthorized entries in the National Database the State Secretaries are only permitted to enter the following data; Contact Information / State Number; The National Office has Sole Responsibility for the Enter Officer Positions and Awards.

Respectfully
Christopher J. Cerillo
CASSAR Secretary

| ANNUAL REPORT RECONCILIATION for (State Society): | | CA |
|--|--|----------|
| Active Membership as of 01/01/2023: | | 1616 |
| Plus: New Regular Members: | | 167 |
| Plus: New Jr Members | | 19 |
| Plus : New Memorial Members: | | 1 |
| Plus : Transfer In: | | 6 |
| Plus : Reinstatements: | | 54 |
| Plus : Reinstatements-Transfers: | | 2 |
| Total Additions: | | 249 |
| Less : Deceased: | | 33 |
| Less : Deceased Memorial: | | 1 |
| Less : Resignations: | | 14 |
| Less : Transfers Out: | | 9 |
| Less : Dropped: | | 182 |
| Total Losses: | | 239 |
| Membership Gain / Loss: | | 10 |
| Total Active Members as of 01/01/2023: | | 1616 |
| Plus / Less: Membership - Gain / + Loss: | | 10 |
| Total Active Members as of 01/01/2024: | | 1626 |
| DUES CALCULATION | | |
| Total Active Members as of 01/01/2024: | | 1626 |
| Less: Emeritus Members: | | 17 |
| Less: National Regular Life Members: | | 63 |
| Less: All Junior Members: | | 107 |
| Less: Sep-Dec New Regular Members: | | 44 |
| Less: Sep-Dec Regular Member Reinstatements: | | 3 |
| Less: Sep-Dec Regular Member Reinstatement-Transfers: | | 1 |
| Total Adjustment to Membership: | | 235 |
| Total Billable Regular Members: | | 1391 |
| Dues Owed for Regular Membership: X \$50 = | | \$69,550 |
| Total Active Junior Members as of 01/01/2024: | | 107 |
| Less: National Junior Life Members: | | 2 |
| Less: Sep-Dec New Junior Members: | | 4 |
| Less: Sep-Dec Junior Member Reinstatements | | 0 |
| Less: Sep-Dec Junior Member Reinstatement-Transfers | | 0 |
| Total Billable Junior Membership X \$5.00: | | 101 |
| x \$5 = | | \$505 |
| Total Billable Membership: | | \$70,055 |
| Total Received | | \$0 |
| Amount (Over)/Under: | | \$70,055 |

November 2023 Report of the Registrar, California State Society, Sons of the American Revolution, April 15, 2023 to March 5, 2024

Reporting Date: March 5, 2024
Submitted By: CASSAR Registrar, Terry Briggs
Prepared by: CASSAR Registrar, Terry Briggs

From April 16, 2023 through March 4, 2024, I as CASSAR Registrar have received and reviewed a total of **290** applications received from **22** CASSAR Chapters; all chapters except Riverside and Santa Barbara. Of these applications 290, **254** applications (**174** new member, Junior member and memorial applications plus **80** supplemental patriot ancestor applications) were forwarded to the NSSAR for NSSAR review, **36** applications were returned to the chapter Registrar as not meeting SAR standards. Of the **254** applications submitted by myself to the NSSAR for review, **132** have completed NSSAR review and of these, **130** have been approved. **12** were pended/disapproved. **10 of the 12** pended applications have already been resolved and approved.

From January 1, 2023 through April 15, 2023 the CASSAR Registrar received and reviewed a total of **48** applications consisting of **33** new member, Junior member and memorial applications plus **15** supplemental patriot ancestor applications.

Upon taking office as CASSAR Registrar on April 15, 2023 the CASSAR pended applications list included 34 pended applications. Significant effort on the behalf of myself as CASSAR Registrar, the chapter Registrars and the applicants since April 15, 2023 has reduced the current number of applications on the CASSAR pended applications list to 16 pended applications (**7** new member applications and **8** supplemental patriot ancestor applications and **1** memorial application). Of the 16 current pended CASSAR applications, 14 were pended before I took office as CASSAR Registrar on April 15, 2023. I prepare and provide a weekly update to CASSAR officers on the number and status of pended applications and new applications received during each week.

In addition to receiving, reviewing and forwarding CASSAR applications to the NSSAR for NSSAR review, as CASSAR Registrar I have been providing, upon request of chapter Registrars, preliminary application reviews and guidance relative to those applications prior to applications being finalized and printed for applicant and sponsors' signatures. My reviews and guidance are shared with the CASSAR Genealogist. The CASSAR Registrar and CASSAR Genealogist communicate with each other to carry-out our duties.

As CASSAR Registrar, I have also been providing information, particularly to new chapter Registrars, to guide CASSAR chapter Registrars in the performance of their duties and to present the CASSAR and NSSAR policies and standards for the preparation and submission of SAR new member and supplemental patriot ancestor applications.

The following resources guide CASSAR chapter Registrars in the performance of their Registrar duties and tasks: CASSAR Recommended Application Process, the *NSSAR Application Preparation Guide* (on SAR.org), the *NSSAR Genealogy Committee Policies* (on SAR.org), NSSAR online Registrar training videos (on SAR.org), the NSSAR Online Application Form Data Entry System (on SAR.org) and the NSSAR Patriot Research System (on SAR.org).

To the best of my knowledge at this time, two CASSAR Chapters currently are without chapter Registrars: Monterey Bay and Mother Lode. It is important for Chapters to have chapter Registrars in order to expand their membership and promote the SAR.

California Society of the Sons of the American Revolution (SAR)
Summary Report - California State Genealogist
149th Annual Meeting of the Membership
Hyatt Regency Hotel
Burlingame, CA

- **Introduction:** As the California State Genealogist for the California Society of the Sons of the American Revolution (SAR), I am pleased to provide a summary report of my recent activities and initiatives for the attendees of the 149th Annual Meeting of the Membership, held at the Hyatt Regency Hotel.

- **Support to the CA State Registrar:** Over the last few months, I have been actively collaborating with our CA State Registrar to enhance the genealogical aspects of SAR operations. This partnership has led to an improved member experience. One of our primary focuses has been the enhancement of our members' experience. We are dedicated to providing a more seamless and user-friendly process for genealogical inquiries and applications. This improvement aims to ensure that our members have a smoother and more efficient experience when engaging with the SAR. Our commitment to our members includes not only accurate and efficient genealogical research but also a user-friendly and accessible process.

- **III. Top 10 FAQ Training for Chapter Registrars, Genealogists, and Presidents (Wednesday, December 6, 2023):** I am pleased to report on a completed initiative, the organization of a "Top 10 FAQ" training session. Held on December 6, 2023, at 7:30 PM PST via Zoom, this training brought together chapter registrars, genealogists, and presidents to address some of the most common questions and challenges encountered in the genealogical aspect of SAR. Notably, 80% of CA chapters were in attendance, including our State Registrar, Terry Briggs. The goals of this training were:
 - **Knowledge Sharing:** Provided a platform for sharing best practices and insights on the most frequently asked questions and common issues.
 - **Consistency:** Ensured that our chapters across the state were aligned in their genealogical processes, contributing to the overall consistency and quality of SAR applications and member experiences.
 - **Empowerment:** Equipped our chapter leaders with the knowledge and tools to provide accurate and prompt responses to genealogical inquiries from members and potential members.
 - **Efficiency:** Increased the efficiency of genealogical documentation and application procedures at the chapter level, making the process smoother for all involved.

This training was an essential step in enhancing the genealogical proficiency of our SAR chapters and ensuring that they can provide the best possible service to our members.

- **Conclusion:** My commitment to enhancing the genealogical foundation of the California Society of the Sons of the American Revolution remains steadfast. The assistance given to the CA State Registrar, our continuous collaborations, and the recently conducted 'Top 10 FAQ' training reflect our united endeavor to uphold the highest standards of genealogical research and application processes within our society.

I look forward to continued progress in our genealogical endeavors, serving our members, and advancing the mission of SAR.

Sincerely,

David L. Morrow II, Esq.
California State Genealogist
California Society of SAR

California Society of the Sons of the American Revolution (SAR)
Summary Report - California State Genealogist
149th Annual Meeting of the Membership
Hyatt Regency Hotel
Burlingame, CA

- **Introduction:** As the California State Genealogist for the California Society of the Sons of the American Revolution (SAR), I am pleased to provide a summary report of my recent activities and initiatives for the attendees of the 149th Annual Meeting of the Membership, held at the Hyatt Regency Hotel.

- **Support to the CA State Registrar:** Over the last few months, I have been actively collaborating with our CA State Registrar to enhance the genealogical aspects of SAR operations. This partnership has led to an improved member experience. One of our primary focuses has been the enhancement of our members' experience. We are dedicated to providing a more seamless and user-friendly process for genealogical inquiries and applications. This improvement aims to ensure that our members have a smoother and more efficient experience when engaging with the SAR. Our commitment to our members includes not only accurate and efficient genealogical research but also a user-friendly and accessible process.

- **III. Top 10 FAQ Training for Chapter Registrars, Genealogists, and Presidents (Wednesday, December 6, 2023):** I am pleased to report on a completed initiative, the organization of a "Top 10 FAQ" training session. Held on December 6, 2023, at 7:30 PM PST via Zoom, this training brought together chapter registrars, genealogists, and presidents to address some of the most common questions and challenges encountered in the genealogical aspect of SAR. Notably, 80% of CA chapters were in attendance, including our State Registrar, Terry Briggs. The goals of this training were:
 - **Knowledge Sharing:** Provided a platform for sharing best practices and insights on the most frequently asked questions and common issues.
 - **Consistency:** Ensured that our chapters across the state were aligned in their genealogical processes, contributing to the overall consistency and quality of SAR applications and member experiences.
 - **Empowerment:** Equipped our chapter leaders with the knowledge and tools to provide accurate and prompt responses to genealogical inquiries from members and potential members.
 - **Efficiency:** Increased the efficiency of genealogical documentation and application procedures at the chapter level, making the process smoother for all involved.

This training was an essential step in enhancing the genealogical proficiency of our SAR chapters and ensuring that they can provide the best possible service to our members.



2024 Annual Report of the Surgeon, California Society Sons of the American Revolution

April 26, 2024

Mr. James Klinger
President, California Society Sons of the American Revolution
c/o Mr. Fred Schuster, CASSAR Secretary
Submitted Via Email: girl4diam@aol.com

Dear CASSAR President Klinger and Fellow Compatriots:

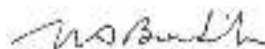
It has been my great honor to have served as CASSAR Surgeon since 2017. Please accept this annual report and let me know if you have any comments, suggestions or concerns. Following is a summary of my activities as CASSAR Surgeon:

- I. Recent and Future Speaker Engagements
 - a. "Medical History of George Washington Talk" I have given or plan to give this talk to the following meetings:
 - i. Yosemite Chapter CASSAR Fresno – Nov 16, 2023
 - ii. John Sutter California DAR Chapter Sacramento – March 30, 2024
 - b. "Using DNA in Genealogy"
 - i. Mother Lode Colony/California Mayflower Society – Sept 16, 2023
 - c. "Medicine at Jamestowne"
 - i. California Society Colonial Wars, Pasadena – January 14, 2024
 - ii. Northern California Company Jamestowne Society – June 22, 2024
 - d. "Medicine at Plymouth Planation"
 - i. None in the past year
- II. Other Outreach
 - a. Revolutionary War Rarities Podcast: I will be interviewed by Compatriots Jim Griffith and Jim Maples on Washington's health history for this NSSAR podcast while at Congress in Lancaster, June 2024
- III. Recent and Future NSSAR Meetings:
 - a. 2023 Spring Leadership – March 3, 2023
 - b. 2023 Fall Leadership – September 22, 2023
 - c. 2024 Spring Leadership – March 1, 2024
 - d. 2024 Congress – July 12, 2024
 - e. 2024 Fall Leadership – October 4, 2024

- IV. I continue to serve on the NSSAR Medical Committee under current NSSAR Surgeon General Dr. David Chaffin (TN) and incoming Surgeon General John A. Turley (WV).
- a. 2023-24 Medical Committee Goals:
- i. Provide medical information to SAR members through the Surgeon General Reports at NSSAR meetings and through SAR Magazine
 - ii. Provide helpful local information to compatriots attending leadership and congress meetings.
 - iii. Promote awareness about the importance of American Revolutionary military and colonial civilian medicine through talks and demonstrations to library groups, historical/genealogical societies, veterans' orgs, etc.
 - iv. Continue to support the Challenge Coin Project now led by Dr. Chaffin honoring physicians & surgeons of the Revolution. Fourteen coins of the planned fifteen series have been produced thus far. The Medical Committee is exploring the production of a display case for the complete coin set to be sold. Goal to complete the series and have the display case available for purchase by America's Semiquincentennial in 2026.
 - v. The Medical Committee is also considering a commemorative book with the biographies of each physician & surgeon honored on the coins. I am writing the biographies for that booklet, which is planned to be released with the Physician & Surgeon Coin Series
 - vi. I will support any other initiative from the NSSAR Surgeon General.
- V. Clinical/Professional 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, the Centers for Disease Control and current evidence-based medicine.
 - b. I hold a current California medical license (#A92192).
 - c. I continue to see patients in my specialty (Allergy & Clinical Immunology).
 - d. I am a speaker and scientific advisory member for a number of pharmaceutical companies. I do not consider my clinical or pharmaceutical activities relevant conflicts for my positions within the NSSAR/CASSAR. However, I am happy to disclose the companies that I am affiliated with should any Compatriots have questions or concerns.

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 BOOK"

California Society Annual Report

Section Two

Treasurers/ Financial/ Chapter
Reports

Pages 23 to 74

CASSAR Sea Cadet Program (NSCC/NLCC) – 2023 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.

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

CASSAR Sea Cadet of the Year 2023 - ?????

UNIT: ??????

Sponsor: SAR ???? 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”.

* The Criteria is being reviewed as the NSCC program has revised the use of the NSCADM 011 Form. The new criteria will be sent out to all CASSAR Chapters when completed.

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

Derek J. Brown, PE Handbook Committee CASSAR
PO Box 326 Clayton, CA 94517
Email DptyDeke@yahoo.com

California Society Sons of the American Revolution Handbook Committee

The Handbook Committee is tasked with ensuring that the Bylaws and Articles of Incorporation are current and posted on the CASSAR Website. The CASSAR Handbook, originally in paper form, was rewritten and updated in 2021 to capture changes made at the National and State levels; in addition, it was converted to a digital format (pdf) and uploaded to the CASSAR web page in January 2022.

The document was rewritten and expanded to address National, State Society and Chapter-level offices and activities at a high level, and incorporated links to documents at the National and State levels where additional details could be provided without duplicating existing documents. These links help minimize changes to the Handbook.

This document continues to be updated on an annual basis to ensure that significant changes to the operations at the National and State levels are identified and formalized and that all CASSAR Compatriots have access to consistent information. The most significant recent changes include the addition of the following: a state-level disciplinary procedure, a state meeting planning template, membership-related resources and links to SAR training resources.

This revision of the Handbook is expected to be uploaded to the CASSAR website after the 2024 Annual Meeting to capture any changes to the Bylaws - as changes to the Bylaws can only be made at the Annual Meeting.

Any material errors in this document should be communicated to the committee to ensure that the most accurate information is being provided to the membership. All officers, committee chairs and compatriots are encouraged to become familiar with this document.

Respectfully submitted,
Derek J. Brown, PE
Chair, Handbook Committee
CASSAR

CALIFORNIA SOCIETY
SONS OF THE AMERICAN REVOLUTION
PUBLIC SERVICE AND HEROISM COMMITTEE REPORT
03/16/2024

In addition to serving as the CASSAR PS&H Chair, I am a member of the NSSAR PS&H Committee and have attended committee meetings at Spring and Fall Leadership in Louisville, KY for the past six years.

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 is 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 published by the NSSAR Public Service and Heroism Committee. Booklets are distributed at the awards luncheon during the National Congress in July of each year. A list of Awardees is also now available on the NSSAR website under the PS&H Committee heading.

In October 2023, the Mother Lode Chapter presented a Heroism Award to Craig Lee of the CDCR along with Law Enforcement Awards to five other Deputies and Officers from the El Dorado County Sherriff's Office and the Placerville Police Department at their annual Public Service Awards Dinner.

In November 2023, at the 148th Annual BOM Meeting, the Harbor Chapter presented a Law Enforcement Medal to Officer Martin Wysoki of the Long Beach P.D. and a Life Saving Medal to Life Guard Edward Maco of the L.A. County F.D.. The Sacramento Chapter presented a Heroism Award to Chapter member Park Ranger John Mohamed of the Fulton El Camino Park Police.

Nomination forms for the Harbor and Mother Lode Chapter awards need to be completed and submitted to the Chairman of the NSSAR PS&H Committee. Also photographs of the presentations are desirable and encouraged.

Respectfully Submitted,

Brian Stephens

CASSAR Public Service and Heroism Committee Chair

California Society, Sons of the American Revolution
Nominating Committee Report
2024 Slate of Officers

The following Slate of Officers was presented at the 148th Fall BOM Meeting in Long Beach, CA on November 3 & 4, 2023 to stand for election at the 149th Annual Meeting of the Membership in Burlingame, CA on April 26 & 27, 2024.

| | |
|-------------------------------|--|
| President: | Don Littlefield |
| Exec. V.P. & President Elect: | John Ferris |
| V.P. North: | Randy Dinsha (2 nd year of 2 year term) |
| V.P. South | Brandon Villardi |
| V.P. Membership: | Scott Witman (2 nd year of 2 year term) |
| Secretary: | Chris Cerillo |
| Treasurer: | Kevin Bidenkap |
| Registrar: | Terry Briggs |
| Chancellor: | Michael Hirman |
| Genealogist: | David Morrow |
| Historian: | Scott Books |
| Chaplain: | Scott Elliott |
| Surgeon: | Mathew Bodish |
| Investment Fund Trustee | John Dodd (2024-2027) |
| National Trustee: | Jim Klingler |
| Alternate National Trustee: | John Ferris |

Respectfully Submitted,
Brian Stephens, Chair, CASSAR Nominations Committee 2023-2024

CALIFORNIA SOCIETY, SONS OF THE AMERICAN REVOLUTION
DAR LIAISON COMMITTEE REPORT
03/15/2024

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 2022, the CASSAR received 29 DAR Finder Forms and placed 6th Nationally. The Certificate of Appreciation and cash prize of \$100 to the California Society DAR Chapter that provides the highest number of referrals was a tie. The Bakersfield Chapter DAR and the Mitz Kahn-A-Kahn Chapter in Ventura each had 7 referrals.

Linda Adams of the Bakersfield Chapter DAR was awarded a Martha Washington Medal for 20 referrals (15 in 2020, 5 in 2021, & 7 in 2022); and Chapter Regent Linda Toler was presented \$100 and a Certificate of Appreciation at the December 2, 2023, joint meeting of the Bakersfield Chapter DAR and Kern Chapter SAR held at the Stockdale Country Club.

Patricia Bagley, Regent of the Mitz Kahn-A-Kahn Chapter DAR in Ventura was awarded the DAR Medal of Appreciation for 7 referrals, and the Chapter was presented with \$100 and a Certificate of Appreciation at the November 16, 2023, Chapter meeting.

Jeanette Lapota of the San Diego Chapter DAR was awarded the DAR Medal of Appreciation for 6 referrals at the November 17, 2023, Chapter meeting.

In 2023, the CASSAR received 15 DAR Finder Forms and no DAR Chapter submitted more than 5 referrals. Daughter Jill Zollinger of the Jose Maria Amador Chapter will be awarded the DAR Medal of Appreciation for 5 referrals. Thank you to Terry Briggs our CA Society Registrar for tracking these submissions.

I attended the NSSAR DAR Liaison Committee meetings at both Spring and Fall Leadership. The National Society DAR (NSDAR) Continental Congress in Washington, DC; and I have attended DAR State meetings with my wife Diane who is the California Society, DAR/SAR/SR Relations Chair, which is a newly created position within the DAR.

Respectfully Submitted,

Brian Stephens,
CASSAR, DAR Liaison

2023-2024 George S. & Stella M. Knight Essay Contest
California Society, Sons of the American Revolution
Officer's Report

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

27 February 2024

Entries Received

- Two chapters submitted entries to the Knight Essay Contest State Chair. They are as follows:
 - Redlands Chapter
 - San Diego Chapter
- The State Chair also received four submissions from individuals for at-large bids.

Disqualified Entries

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

Winning Essay

- The judging committee, comprised of three members, voted Sarith Narasimha of Livermore, CA as the winner for the 2023-2024 Knight Essay Contest. Sarith entered as an at-large bid, and went through two judging rounds, first among the at-large entries and then among the chapter entries. The State Chair, Patrick Cecil, is sponsoring Sarith. His essay is entitled: "James Wilson and the Constitution: A Notable Mystery of History."

Recommendation and Feedback

- A number of late at-large entries were received past the deadline. Students are confused as to what the deadline day is. The National website states February 15 and is very visible. However they do not understand the local chapter submission process (or an at-large submission to myself if no chapter is present, as is the case with California's representative this year) and the deadlines that Local and State Societies have. I have noted this to the National Chair, Ernie Coggins, recommending that the National SAR Essay Contest website be edited to have all steps and deadlines clearly explained.



The California Society
of the
Sons of the American Revolution



Spirit of America Award Program
Annual Report for 1 January to 31 December 2023

Established by the General Patton Chapter as an annual award in 1985 during the United States of America Bicentennial and endorsed by the CASSAR, the Spirit of America Award provides tangible recognition for deserving eighth grade students at their graduation ceremonies. Selected by the faculty of their school, and further evaluated by the school district, the criteria for the students is based on:

1. **Dependability** (punctuality, truthfulness, honesty, loyalty, trustworthiness and self-control at school, home and community).
2. **Cooperation** (respect for authority, property and the rights of others, and courtesy).
3. **Leadership** (ability to improve the school experience for self and others).
4. **Patriotism** (loyalty to the United States of America, knowledge of the purposes as expressed in the Preamble of the Constitution and the Declaration of Independence, and the meaning of and respect to the Flag of the United States of America).

The General George S. Patton, Jr. Chapter has presented this award annually since its inception, this year presenting awards at the graduation ceremonies for the five middle schools in the Camarillo Pleasant Valley School District. The Chapter awarded two bronze Good Citizenship medals and seven Outstanding Citizenship pins with certificates to nine deserving student graduates from these schools. Chapter compatriots presented the awards and certificates at the school graduation ceremonies 14 and 15 June 2023.

Las Colinas Middle School (15 Jun – Compatriot James Armstrong)

Girl: Miera McHaley Stouch (Outstanding Citizenship pin & certificate)

Boy: Owen Cramer (Bronze Good Citizenship medal & certificate)

Los Primeros School of Science and Art (15 June – Compatriot Eric Stassforth)

Girl: Annabelle Wagner (Bronze Good Citizenship medal & certificate)

Boy: None

Monte Vista Middle School (15 June – Compatriot Eric Kaufman)

Girl: Brynn Seay (Outstanding Citizenship pin & certificate)

Boy: Deagan Finch (Outstanding Citizenship pin & certificate)

Pleasant Valley School of Engineering and Arts (15 June – Compatriot Louis Kreuzer)

Girl: Chrystal Salomon (Outstanding Citizenship pin & certificate)

Boy: Alexander Warren Alvarez (Outstanding Citizenship pin & certificate)

Santa Rosa Technology Magnet (14 June – Compatriot Robert Taylor)

Girl: Taryn Stillwagon (Outstanding Citizenship pin & certificate)

Boy: John Turk (Outstanding Citizenship pin & certificate)

Respectfully submitted

Robert L. Taylor

Spirit of America Award Program Chairman