



## 150<sup>th</sup> Board of Managers Meeting California Sons of the American Revolution

Orange County Hilton,  
Costa Mesa, California  
October 24-25, 2025

### MINUTES

**Call to Order** 9:02 AM Friday

President John R. Ferris

Invocation

Chaplain Rev. Scott Elliott

Advance and Presentation of the Colors

Color Guard Cdr. Brandon Villardi

Pledge of Allegiance to the Flag

Executive VP Randy Dhindsa

Posting of the Colors

California SAR Color Guard

SAR Pledge

Secretary Chris Cerrillo

Greetings and Introduction of Invited Guests

President John R. Ferris

#### Remarks by SAR National Officers:

**Michael J. Elston, Esq., the 121<sup>st</sup> President General:** PG Elston discussed recent organizational efforts, including the Cathedral City ceremony, the 250<sup>th</sup> anniversary, improvements at Kentucky headquarters, enhanced digital application processing, and plans for greater membership and public visibility. He urged participation in community events, partnerships with other groups, and coordination of state activities with national programs.

**James W. Klingler, VPG Western District:** VGP Klingler welcomed national officers and acknowledged the overlapping district meetings, adding the scheduled Zoom meeting for Nevada, Hawaii, and California. He reported on California's education programs, grave marking in San Diego, and noted that the 250th Commission is advancing, with all states making progress. Orange County is organizing a July 4th event at Knott's Berry Farm, and museum work continues.

**John L. Dodd, Esq., President General (2023-2024):** John thanked P.G. Elston, and encouraged leaders to read the handbook. He noted limited collectible rifles in the ongoing

rifle program, promoted patriotic merchandise for fundraising, and urged early hotel reservations for the major Philadelphia celebration before Congress.

**Joe Dooley, President General (2013-2014):** Joe gave an enthusiastic “hello” to everyone!

**William A. Greenly, Secretary General:** Secretary General Greenlee shared that he is a candidate for President General, and he aims to build on PG Elston’s work by completing the strategic plan. He is prioritizing a paperless application system, updated records, and a unified national dues billing system, making payments easier and improving member retention. William stressed adopting the strategic plan and the need for digital solutions.

**Keith A. Weissinger, Registrar General:** Registrar General Weissinger shared that Membership now exceeds 37,500 and is growing. Regular and junior applications are up, but supplemental applications still take time, though the delay is down to 39 weeks. New members receive onboarding emails with resources, and leaders get a six-month follow-up to encourage participation in SAR activities.

**James Osbourn, Librarian General:** Librarian General Osbourn urged members to support the library through the Friends of the Library program. Lifetime membership costs \$1,000, or \$25 annually. Donations fund acquisitions like a rare 1764 stamp, one of only six known. Sign up at the back table or online.

**Stephen Renouf, Spain Trustee:** Trustee Renouf reported significant changes for the Spain Society this year, including the passing of its president, the Duke of Sevilla, and the election of his son as president, along with new officers. The D.A.R. approved Pablo Pérez Fustinani, who defended Havana in 1782, as a new patriot ancestor. Renouf hopes these updates will boost membership.

**Dan McKelvie, California, Trustee:** California trustee McKelvie reported that national black powder insurance is advancing, but chapters should note costs, meet requirements, and remember cannons aren’t covered. He encouraged attendance at the July 2–6, 2026 SAR events in Philadelphia (Marriott downtown) and mentioned that reservations are open for the 2026 Congress in Greensboro, NC, at the Four Seasons. He highlighted Elizabeth Dole’s citizenship award and stressed continued support for veterans through her foundation. He also urged ongoing chapter involvement in veterans’ initiatives.

**James W. Klingler, President, SAR Foundation** SAR Foundation President Klingler explained that the SAR Foundation focuses on fundraising for SAR programs, particularly the Education Center and Museum. California leads with a significant multi-year donation and has challenged other states to match it. Members may contribute via Liberty Tree or 1776 campaigns, with one-time or recurring options. The Foundation pursues grants, including a \$5 million award from Kentucky and works with Indiana University to create 3D museum artifact images. SAR is now an authorized charity for federal employee payroll deductions, supporting its educational mission.

**Dan McKelvie, Chairman Education Center & Museum Construction:** Chairman McKelvie announced California’s annual \$25,000 pledge for four years to the SAR Education Center and Museum, with the last payment due at the upcoming Congress. Phase 3b, focused on cabinetry, graphics, and retail spaces, will finish by May 20. The museum will feature 16 historical patriot figures, four interactive displays, and 24 video narratives online.

Fundraising continues, and a 2026 opening is planned for the 250th anniversary of American independence.

**Derek Brown, Vice Chair (West)** of the George Washington **Endowment Fund**: Vice Chair Brown shared that the GWEF’s Fellows program is a restricted fund for underfunded SAR projects. Members can become fellows by donating \$1,000, either at once or in installments, including online payments. The program helps internal SAR projects and public outreach.

**Dr. Kent Gregory – Museum Board**: Dr. Gregory reported that since 2019, the SAR museum has obtained over 460 historical objects valued at more than \$700,000, with 79 donated by California Society members. Recent gifts include Revolutionary War newspapers. The board has commissioned ship and Turtle submarine models, and raised over \$84,000 for mannequins, with only the French figure pending funding. Artifact loan requests are rising, including an authenticated piece of Martha Washington’s wedding dress, and the museum is partnering with groups like the Society of Cincinnati. Members are encouraged to visit SAR.org for sponsorship opportunities.

**Introduction of California Society Past Presidents: President John R. Ferris**

Past CASSAR Presidents	Attendance
Robert D. Ebert (2006-07)	Absent
Stephen R. Renouf (2008-09)	Present
Lou Carlson (2009-2010)	Present
John L. Dodd, Esq. (2011-12)	Present
Jim L. W. Faulkinbury (2014-15)	Present
Dr. M. Kent Gregory (2015-16)	Present
Ron Barker (2016-2017)	Absent
Derek J. Brown (2018-2019)	Present
Robert L. Taylor (2019-2020)	Absent
Donald B. Littlefield (2020-2021)	Present
Brian Stephens (2021-2022)	Present
James W. Klingler (2022-2024)	Present
Donald B. Littlefield (2024-2025)	Present

**Roll Call: Executive VP Randy Dhindsa**

CASSAR Officer	Attendance
CASSAR President John R. Ferris	Present
Executive Vice President Ray Dhindsa	Present
Vice President South Brandon Villardi	Present
Vice President North Dan Schurtz	Absent
Vice President Membership Scott Whitman	Present
Secretary Chris Cerillo	Present
Treasurer Kevin Bidenkap	Present
Chancellor Michael Herman, Esq.	Present
Genealogist David Morrow	Absent – Arrives in the afternoon.
Registrar Terry Briggs	Present
Historian Steve Belden	Present
Chaplain Reverend Scott Elliott	Present
Surgeon Doctor Matthew Bodish	Present

Investment Fund Trustee Name	Attendance
Stephen R. Renouf	Present
Kevin Bidekap	Present
John L. Dodd	Present

Chapter Name	Representative	Attendance
Central Coast	Nathaniel Maas	Absent
Coachella Valley	Chris Cerillo (present as State Officer) Dave Authors representing	Present
Delta	Andrew McClure	Absent
Eagle	Benny White	Present
General George Patton Jr.	Stephen Andrews	Present
Gold Country	David Gilliard	Present
Harbor	James Bunker	Present
Kern	Chris Scott	Present
Monterey Bay	Jack Franke	Absent
Orange County	Lauren Stratton	Present
Redlands	Shawn W. Price	Present
Redwood Empire	Bill Van Valkenburgh	Absent
Riverside	Michael Mann	Present
Sacramento	Nick Gautier Jim Faulkinbury representing	Present
San Diego	Jim McAdory	Present
San Francisco	John Dedo	Absent
Santa Barbara	Jeff Weinbender	Absent
Silicon Valley	Terry Briggs (present as State Officer)	Absent
Sons of Liberty	Mark Cross	Present
South Coast	Barry Michaels	Present
Thomas Jefferson	Dan Shirtz Dan Brown representing	Present
Yosemite	Scott Nichols	Present

**Approval of Minutes of Previous Meeting:** the motion to approve the 2025 Spring Membership Meeting was proposed by Don Littlefield and seconded by Brandon Villardi. The minutes received unanimous approval from all members in attendance.

## Elected California Society Officer Reports

**President John R. Ferris:** President Ferris acknowledged Phil Mitchel, James Bunker, Brandon Villardi, and Don Littlefield for their support. He also thanked the Ladies Auxiliary and encouraged all California SAR members to embrace their leadership roles and support one another. President explained the purpose of the red roses is to reinforce our commitment to the Auxiliary.

**Executive Vice President Randy Dhindsa:** Executive Vice President Dhindsa reported on a productive year, noting his participation in key events, including DAR district memorials and numerous color guard activities, ongoing work on the monthly newsletter, involvement with the budget and audit, and support for the America 250 committee.

**Vice President South Brandon Villardi:** Vice President Villardi reported strong activity among Southern California chapters, particularly around America 250 events. He urged chapters to

share event plans and noted a successful Coachella chapter gathering. Villardi invited members to help decorate floats for the Hollywood Christmas Parade from December 20–23, mentioning DAR and CAR participation. He has attended nearly forty color guard events and several leadership meetings.

**Vice President North Dan Shurtz:** no update

**Vice President Membership Scott Whitman:** 2 term Vice President of Membership Whitman reported improvements to the California SAR new member inquiry process, noting that a previous IT issue causing lost messages has been fixed. In the past six months, there were 218 inquiries, averaging 36 per month. He emphasized the importance of keeping chapter contact information current on the California Society website so prospective members receive accurate meeting details and encouraged everyone to update their chapter information.

**Secretary Chris Cerillo:** Secretary Cerillo, working with incoming Secretary Steve Andrews, is improving certificate tracking and record-keeping by introducing a new system and urging members to keep their contact information updated. He emphasized the importance of accurate membership data, regular checks of life and dual members, and clear communication. Andrews recommended using Microsoft Excel for rosters and shared formatted worksheets, and both encouraged a state server for standardized emails and websites. Cerillo explained that application delays were due to national IT issues and highlighted the need for annual life member reviews and timely chapter updates. Members should update their profiles, notify the secretary of changes, and officers must inform Greg Hill to keep the website accurate.

**Treasurer Kevin Bidekap:** Treasurer Bidekap reported that the California Society's finances remain strong, with cash on hand totaling \$35,269 at the end of a nine-month period. Total receipts through September 30 were \$166,000—\$3,900 below budget. Operational expenses stood at \$127,000, \$35,000 under budget, resulting in a net operating surplus of \$31,201. Donations totaled \$11,286, including \$10,971 from Intel via Don Littlefield, \$45 from the Thomas Jefferson Chapter, and \$200 from the California Society.

**Chancellor Michael Hirman:** Michael said he has no update to provide.

**Genealogist David Morrow:** no update

**Registrar Terry Briggs:** Registrar Briggs reported that in the last two and a half years, 616 applications were processed, with about 20% as supplemental patriot ancestor applications and the rest for new members. Since April, 159 applications came in—20% supplements—and 13 were returned as incomplete. Pending applications dropped from 34 to 6, with a goal of 4. Briggs suggested adding an assistant registrar to divide duties between supplemental and new member applications.

**Surgeon Dr. Matthew Bowdish MD.:** Surgeon Bowdish, serving since 2017, provides medical advice, maintains his license, and gives talks on medical history, especially George Washington's health, both online and in person. He announced his candidacy for SAR Surgeon General (2026–2027) and asked for California Society's endorsement. He also leads a challenge coin project honoring Revolutionary War doctors, with proceeds supporting the library and museum, and is collaborating on joint programs and a possible medical history exhibit at the Louisville museum.

**Historian Steve Belden:** Historian Belden gave an update on the ongoing effort to digitize CA State Society records, which involves organizing documents, converting archives to digital files, and making materials more accessible and searchable. He mentioned CA Reveal as a potential central platform for storing and managing these records. Steve is also exploring a location for physical archives, with the Pasadena Hund Club as an option. The project centers on both safeguarding and improving access to archival materials.

**Chaplain Rev. Scott Elliott:** Chaplain Elliott noted that many members were unaware of memorial certificates at last year's meeting, so this year, he brought extra copies for distribution. These certificates honor members who have passed away. Chapters can send them to families, present them at meetings, or bestow them at memorial services to recognize the individual's contributions.

**Investment Fund Trustees:** the CASSAR Invested Funds, overseen by Trustees Stephen Renouf – Chairman, (2023-2026), Kevin Bidekap (2025-2028), John L. Dodd, Esq. (2024-2027) under CASSAR Bylaw No. 4, Section 12, are managed through Morgan Stanley Smith Barney in five distinct accounts. As of October 1, 2024, the funds totaled \$537,802.22 and grew to \$543,086.22 by September 30, 2025, an increase of \$5,284.00. This growth was primarily due to \$45,000 in unrealized stock market gains, offset by a \$25,000 withdrawal for SARF Donations and a \$15,000 transfer to CASSAR from the Unallocated Fund. See Appendix for full report.

## California Society, SAR Chapter Reports

**Central Coast - Nathaniel Maas: no update**

**Coachella Valley - Chris Cerillo:** Chris reiterated the need to keep email addresses current for effective communication and reaching out to old members (see office report for Secretary)

**Delta – Andrew McClure (Rev. Scott Elliot):** Scott noted that the chapter is seeking solutions for the financial challenges of rising costs, mainly from new insurance requirements. He emphasized compliance with youth protection training. Members are urged to complete the Youth Protection Certificate Program.

**Eagle – Benny White:** Benny said members are educating and encouraging people to replace worn flags and is asking the community to get involved in community efforts like Toys for Tots. The chapter is also working to correct mistakes with JROTC awards, ensuring proper recognition and engagement with youth programs. Additionally, they have reinstated 28 former members, strengthening the group.

**Gen. George Patton Jr. – Stephen Andrews:** Stephen noted that although the chapter has 111 members, meeting attendance remains low, even at special events. Andrews conducted an anonymous survey and identified challenges in engaging members due to distance and social changes. He emphasized the need for chapter collaboration and innovative activities to boost participation, encouraging persistence despite these hurdles.

**Gold Country – David Gilliard:** David said that Gold Country's membership has grown, but participation is low. The chapter's poster program for fifth graders receives about 600 posters annually and keeps strong ties with schools. Their historic flag program, featuring 25 American

Revolution flag replicas, is popular with schools and community groups. Both affordable, engaging programs are open for other chapters to use.

**Harbor – James Bunker:** James shared that the Harbor Chapter has doubled its membership by partnering with local DAR chapters and focusing on veterans. Lively events and meetings have boosted attendance from twelve to sixty people. Members are recognized with challenge coins and awards, which are shared on social media to promote community involvement. The chapter's use of technology has helped maintain membership and reduce dropouts. Teamwork and outreach have fostered a vibrant, growing chapter.

**Kern - Chris Scott:** Scott mentioned that the Kern chapter is progressing with its Liberty Tree rededication, raising \$4,000 of a \$10,000 target for a bench, plaque, and ceremony. Bruce Suero leads the project and offers resources for similar efforts. The color guard stays active, working with DAR and law enforcement at parades and civic events. School programs are rebounding after COVID, supported by the 1776 Book Challenge for the America 250 anniversary.

**Monterey Bay – Jack Franke:** no update

**Orange County – Lawrence Stratton:** Lawrence said that the Orange County chapter excels at recruiting and retaining members, with its color guard and flag certificate programs standing out. Challenges with leadership turnover highlight the need for better succession planning. The chapter continues to make notable progress with the America 250 program.

**Redlands – Shawn Price:** Shawn said that the Redlands chapter has faced challenges due to leadership changes and internal issues. To address these, the chapter rewrote its bylaws and filled most officer positions. Despite losing key members, the chapter will hold elections and continue operating. Sean Price plans to support new member recruitment through his genealogy expertise, aiming to help the chapter recover.

**Redwood Empire – Bill Van Valkenburg:** no update

**Riverside – Michael Mann:** Michael mentioned that the Riverside chapter holds monthly meetings and runs the 250 programs. Their key event, the Riverside Veterans Day Parade, is planned for November 8. The chapter started a Facebook page and puts out a strong newsletter. They've worked with DAR, presenting Abigail Adams medals to three women, and this year welcomed 17 new members, including swearing in a junior member at an Eagle Scout honor court. Meeting attendance is still an ongoing challenge.

**Sacramento – Nic Gauthier (Jim Faulkinbury):** Jim shared that the Sacramento chapter welcomed seventeen new members this year and has sixteen more pending approval. Meeting attendance is low, and leadership roles are difficult to fill, affecting youth programs. The chapter's "250 program" was highly successful, raising nearly \$33,000 and distributing about 3,400 historical fiction books to classrooms. The color guard is also seeing renewed interest. The main challenge remains finding volunteers and leaders to sustain activities.

**San Diego – Jim McAdory:** Jim said that the San Diego chapter faces challenges with an aging membership and declining activity levels. Efforts to improve meeting accessibility and launch new initiatives have had limited success. A key project for the coming year is the compatriot grave marking ceremony, honoring former chapter leaders, though cemetery regulations present logistical hurdles. The chapter maintains traditions such as the annual Washington

Birthday Dinner and benefits from DAR collaboration, which helps with meeting attendance. Plans include creating a central memorial marker listing SAR members buried in San Diego. Despite difficulties in recruiting and retaining volunteers, the chapter remains hopeful and committed to sustaining its activities.

**San Francisco – John Dedo:** no update

**Santa Barbara – Jeff Weinbender:** no update

**Silicon Valley –Terry Briggs:** Terry explained that the chapter remains active, with its color guard participating in eight events this year. The chapter regularly honors ROTC, JROTC, Naval Sea Cadets, and Eagle Scouts with awards. They have donated \$13,000 to the education center and museum, including \$2,000 this year. The main challenge is finding more members to serve as officers, as Griggs fills multiple roles. Some younger members are beginning to get involved, and the chapter supports a grave marking project for Spanish patriots in the San Jose/Santa Clara area.

**Sons of Liberty – Mark Cross:** Mark shared that the chapter has enhanced its WordPress website and communicates with members through MailChimp and Microsoft’s nonprofit tools, which also help manage applicant paperwork. Collaboration with DAR has increased, and medals are now awarded at Memorial Day and Veterans Day events. The chapter still faces challenges with member attendance and participation, especially in meetings and youth programs. Fundraising and engagement remain issues, and they are seeking strategies to boost involvement and delegate responsibilities more effectively.

**South Coast – Barry Michaels:** Barry said that the chapter recently reached 100 members and is pleased with its progress. They are planning new initiatives for 2026, but their main challenge is making meetings more social and enjoyable to keep new members engaged. Currently, meetings include dinner, guest speakers, and the America 250 segment, but they want to focus less on business reports and more on fun and social interaction. The chapter is seeking ideas to enhance the social aspect of their gatherings.

**Thomas Jefferson – Dan Shurtz (Derick Brown):** Derick noted that the chapter recently celebrated its centennial anniversary. The chapter has revived its color guard, expanded collaboration with DAR chapters, and used the DAR Finder form to boost membership. They have increased participation in school programs and emphasize a “family plan” to encourage ongoing involvement. Mentoring, new Eagle certificates, and the 250 program further contribute to the chapter’s engagement.

**Yosemite – Scott Nichols:** Scott mentioned that the chapter has around sixty members and ten prospects, prioritizing personal outreach, especially to older members, through phone calls. Recent highlights include participating in the Honor Flight event, giving history presentations to fifth graders, and joining community activities like the Grizzly games and a local PBS premiere. The chapter also joins the Veterans Day parade, collaborates with the California Veterans Home in Fresno, and uses Constant Contact to improve communication. Active programs for junior ROTC and ROTC cadets continue, with plans to expand flag certificate efforts next year.

## Youth Program Reports

Youth Program reports were tabled until the Spring Membership meeting

## Committee Reports

**America 250:** John R. Ferris noted that James Bunker is taking on the 250 Committee.

**Americanism Program - Duncan Campbell:** Duncan reported that CASSAR made progress in its rankings this year, moving from last place to 8th out of 9 among societies. In the PG Streamers category, CASSAR achieved 6th place out of 7. This demonstrates improvement compared to the previous year's results.

Americanism award National rankings for 2024		
	Americanism	PG Streamer
<b>Small Chapter &lt;41 members</b>		
Eagle Chapter	85 of 152	76 of 152 #1 CASSAR
<b>Medium Chapter 40&lt;&gt;91 members</b>		
Harbor Chapter	44 of 127	29 of 127 #1 CASSAR
South Coast	55 of 127	49 of 127
<b>Large Chapter 90&lt;&gt;151 members</b>		
San Diego	9 of 56	38 of 56 #1 CASSAR
Thomas Jefferson	33 of 56	15 of 56
<b>Very Large Chapter &gt;150 members</b>		
Orange County	16 of 20	15 of 20
Sacramento	17 of 20	14 of 20 #1 CASSAR

**Audit Committee - Randy Dhindsa:** Randy reported that the audit of records covering April 1 to August 31 was completed, with Treasurer Kevin Bidenkap confirming that everything was in good order. Appreciation was expressed to everyone who contributed to the process.

**Budget and Planning - Randy Dhindsa:** Randy shared a budget with \$184,000 in projected revenue and \$177,000 in expenses, anticipating a \$6,390 surplus before investment transfers and \$53,000 after. Bruce Werda requested \$10,000 for a Liberty Tree and bench project, with Joe suggesting a \$3,000 exemption from the George Washington Endowment Fund. The youth video program received \$1,750 more. For the teacher program (now Founding Forward Foundation), the group approved keeping the \$4,800 budget line, with a one-time \$2,400 exception allowing three teachers to participate next year. The motion carried.

## Agenda, Day 2

Saturday, October 25, 2025

Call to Order @9:02

Invocation

Pledge of Allegiance to the Flag

SAR Pledge

Roll Call/Quorum

President John R Ferris

Chaplain, Rev. Scott Elliott

VP South Brandon Villardi

Treasurer, Kevin Bidenkap

Historian Steve Belden

<b>CASSAR Officer</b>	<b>Attendance</b>
CASSAR President John R. Ferris	Present
Executive Vice President Ray Dhindsa	Absent
Vice President South Brandon Villardi	Present
Vice President North Dan Schurtz	Absent
Vice President Membership Scott Whitman	Present
Secretary Chris Cerillo	Present
Treasurer Kevin Bidekap	Present
Chancellor Michael Herman, Esq.	Present
Genealogist David Morrow	Absent
Registrar Terry Briggs	Present
Historian Steve Belden	Present
Chaplain Reverend Scott Elliott	Present
Surgeon Doctor Matthew Bodish	Present

<b>Chapter Name</b>	<b>Representative</b>	<b>Attendance</b>
Central Coast	Nathaniel Maas	Absent
Coachella Valley	Chris Cerillo (present as State Officer) Dave Authors representing	Present
Delta	Andrew McClure	Absent
Eagle	Benny White	Present
General George Patton Jr.	Stephen Andrews	Present
Gold Country	David Gilliard	Present
Harbor	James Bunker	Present
Kern	Chris Scott	Present
Monterey Bay	Jack Franke	Absent
Orange County	Lauren Stratton	Present
Redlands	Shawn W. Price	Present
Redwood Empire	Bill Van Valkenburgh	Absent
Riverside	Michael Mann	Present
Sacramento	Nick Gautier Jim Faulkinbury representing	Present
San Diego	Jim McAdory	Present
San Francisco	John Dedo	Absent
Santa Barbara	Jeff Weinbender	Absent
Silicon Valley	Terry Briggs (present as State Officer)	Absent
Sons of Liberty	Mark Cross	Present
South Coast	Barry Michaels	Present
Thomas Jefferson	Dan Shirtz Dan Brown representing	Present
Yosemite	Scott Nichols	Present

# Committee Reports (continued)

## **Nominating Committee Report – 2026-2027 Officer Slate - Chairman, Jim W. Klingler:**

Chairman Klingler, presented the slate of officer nominees for the upcoming year to be voted on at the annual meeting in April. The nominees are:

- President – Randy Dhindsa
- EVP – Brandon Villardi
- VP North – Dan Shurtz
- VP South – Kevin Bidekap
- Membership – Scott Whittman
- Secretary – Steve Andrews
- Treasurer – Philip Mitchel
- Chancellor – Michael Herman, Esq.
- Registrar – David Authors
- Genealogist - David Morrow
- Historian – Steve Belden
- Chaplain – Rev. Scott Elliot
- Surgeon – Dr. Matthew Bowdish, MD
- Inv. Trustee – J Dodd (24-27), Kevin B (25-28), Stephen R. (26-29)
- National Trustee – John R. Ferris – Alternate is Randy Dhindsa

**Ethics Committee - Rev. Scott Elliott, Michael Hirman, Stephen Renouf:** no update

**Bylaws – Michael Herman, Esq., Chris Cerillo, Stephen Renouf:** members approved amending bylaw #2 section 4 to allow the state society to close a chapter missing six consecutive meetings without representation, starting April 2026. Closure requires a majority vote and is one way to address inactive chapters. President Ferris moved the amendment, Chris Cerillo seconded, and few opposed. Chris requested prior notification before any closure.

**Membership – Recruit/Retain/Recover NSSAR Membership Chairman - Derek Brown:** The membership discussion emphasized recruitment, retention, and outreach, encouraging chapters to use SAR website resources and reconnect with dropped members. Mid-sized societies have seen the most growth, and California has improved its application process. Efforts to create an online dues page continue, with a reminder to utilize the membership committee's guides.

# Old Business

**Old Business - President John R. Ferris:** no discussion

# New Business

**CASSAR Annual and BOM Meetings Format - President John R. Ferris:** tabled

**New Chapter:** Don Littlefield and Kevin Knapp requested approval to reopen the Redding chapter. Michael Herman, Esq. asked if copies of the bylaws were available. John L. Dodd noted that funding for back penalties, an off-budget item, would require approval, otherwise the executive board would cover the fees. John L. Dodd moved to fund up to \$1,000 for regulatory fees, seconded by Brandon Villardi. Mark Cross asked if the chapter was new or revived; Don clarified it is a revival. The chapter closed in 2019 and has two former members. The motion was unanimously approved.

**1<sup>st</sup> Marine Landing Monument:** Chris Cerillo spoke on behalf of Bill Nay from the Redwood Chapter, who was unable to attend due to his wife's illness. Chris discussed plans for a monument to honor the Marines at Pompano Beach, Florida, and requested funding support from the California Society. After some discussion about the monument's total cost and donation tiers, a motion was made to donate \$1,000, which would help the chapter reach the bronze donation level and have "California" recognized on the monument. The motion was seconded by Phil Mitchel, confirmed to be feasible under the American 250 budget, and passed unanimously.

**Coachella 250 monument:** Chris Cerillo motioned to donate \$1,000 to the Coachella Valley Chapter toward the \$9,879 cost of their 250th anniversary monument at the Desert Memorial Park. The monument features a five-foot sculpture with George Washington on the front, a script honoring the Founding Fathers on the back, and the SAR and 250th logos, with a dedication from the chapter. Installed near the veteran's section of a cemetery, the project was mainly supported by Bill Haynes and Ed O'Leary. Individual donations fell short, so the funding request aimed to reimburse the chapter through the CASSAR 250 budget. John L. Dodd noted funds like GWF are designed for such projects. Jim Klingler seconded the motion and called for a vote. The motion passed unanimously.

**250 Medals for the Chapters:** During the meeting, President Ferris distributed medals to chapter representatives present, with instructions for them to take additional medals back to members who were absent.

<b>Gen. George S. Patton Jr. Chapter</b> Randy Hyatt - Silver *	<b>San Diego Chapter</b> Gary Gauer - Silver * Doug Wright - Silver * Michele Johnson, DAR - Silver * Kathleen Winchester, DAR - Silver *
<b>Harbor Chapter</b> Rhys Dalton - Silver Sherie Dalton - Silver Andrew Variano - Silver Kenneth Winiecki - Gold *	<b>Silicon Valley Chapter</b> Adam Capell - Silver *
<b>Kern Chapter</b> Mike Bradley - Silver Stephen Corbin - Silver Edgar Flickinger - Gold * Rodney Goodman - Gold * Mary Ann Claxton, DAR - Gold *	<b>South Coast Chapter</b> Norman Broadhurst - Silver * Robert Maples - Silver * Denise Michaels (DAR/Spouse) - Silver * Bunny Smith (DAR) - Silver *
<b>Orange County</b> Lou Carlson - Silver Karen Carlson - Silver	<b>Sons of Liberty Chapter</b> Carrie Harr, DAR - Silver * Julia Harr, C.A.R. - Gold * Olivia Harr, C.A.R. - Silver * Emma Harr, C.A.R. - Silver *
<b>Sacramento Chapter</b> Sandra Anderson - Silver * Steven Belden - Silver * Larry Brasher - Gold * Nicolas Gauthier - Silver * Russ Kaiser - Silver * Kevin Knapp - Silver * Emily Boling (C.A.R. Sr Idr, DAR) - Gold * Madison Olson (C.A.R.) - Silver *	<b>Thomas Jefferson Chapter</b> Stephen Renouf - Gold *

\* indicated medal was handed out at meeting.

**Banners & Streamers:** Brandon Villardi received several banners and streamers received at Congress to recognize the California Society's achievements, including the Officer Streamer, PG Education Outreach, CA Eagle Scout Scholarship, Counsel of Youth Poster Contest, Knight Contest, JRTOC, and Moses Adams Brochure.

## NSSAR Candidate Forum

President John R. Ferris invited NSSAR Office Candidates to come up and speak.

**Keith Weissenger for Registrar General (unopposed):** Keith stressed that the Registrar General candidate must follow member-focused approach using a metaphor of nurturing and engaging new members to prevent them from losing interest or drifting away. He advocated for active involvement and encouragement at the chapter level, highlighting the importance of welcoming and supporting all members.

**James Osbourn for Librarian General (unopposed):** James described a hands-on approach, committing one week each month from August through October to work directly with library staff. They emphasized practical, involved teaching, noted ongoing improvements in staff efficiency, and addressed staffing challenges within the library. members -

**Derek Brown for Genealogist General (contested):** Derek emphasized consistency in applying committee policies, collaboration across society levels, making tough decisions, promoting training, streamlining applications, moving to a paperless system, increasing awareness of the Family Plan, and listening to member feedback.

**David Chafman for foundation board at large 26-27 (not present):** Dr. Chafman seeks support for his election. With four years of board experience, he believes the Foundation should prioritize engaging high-potential donors for the museum and education center. If elected, he plans to leverage his team's expertise to secure major gifts and further the organization's objectives.

**Scott Collins for Treasurer General (contested):** Scott noted that he has 46 years' experience as a CPA, and worked with several nonprofits, including the Georgia Society SAR. Scott served on audit and budget committees and fulfilled bylaw duties such as financial reporting. He aims to improve financial presentation timing, address budget challenges, explore digitized record sales for funding, and help finance unfunded projects. He believes his experience uniquely qualifies him and commits fully if elected.

**Tracy Ponders for Chancellor General (unopposed):** Tracy emphasized his 40 years of legal experience, his passion for the organization and his commitment to preserving its legacy and the stories of patriot ancestors.

**Scott Giltner for SAR Foundation Board At Large Member 26-29 (contested):** Jim Klingler spoke on behalf of Scott and endorsed him for Foundation Board Member at Large position, noting his long membership, engineering background, project management experience, and innovative ideas for improving donation software and processes.

**Brook Lyles for Secretary General (unopposed):** Dr. Gregory Kent spoke on behalf of Brook Lyles, and endorsed him for Secretary General, highlighting his extensive experience, including roles as chairman of the education committee, Color Guard Commander, and chairman of the Uniform Maintenance Subcommittee.

**William A. Greenly for President General (Unopposed):** William intends to build on PG Elston's work, focusing on completing the strategic plan. He is prioritizing a paperless application system, updated records, and a unified national dues billing system with one shopping cart for all levels. This will simplify payments and improve member retention. William also encouraged members to adopt the strategic plan and emphasized the importance of digital solutions for the organization's success.

**NSSAR Candidate Endorsements:** John L. Dodd moved to vote on the candidates. Kevin Bidenkap provided the second. President Ferris then excused the candidates from the room. The California Society voted to endorse several candidates for various positions after John L. Dodd moved to endorse William A. Greenly, Keith, James Osborn, Tracy Ponders, and Brook Lyles, with unanimous support. The Society also unanimously endorsed Derrick Brown for Genealogist General, Scott Collins for Treasurer General, and Scott Giltner for the SAR Foundation Board At Large Member.

## **Contested Candidates**

- Derrick Brown for Genealogist General: Motion by John L. Dodd, seconded by the entire body of voting members.
- Scott Collins for Treasurer General: Motion by Stephen Renouph, seconded by Bradon Villardi.
- Scott Giltner for SAR Foundation Board – At Large Member: Motion by Jim Kingler, seconded by Bradon Villardi.

## **New Business from the Floor- President John R. Ferris:**

**151st CA SAR Annual Meeting Spring - Yosemite President Scott:** The annual spring meeting, organized by Yosemite President Scott Nichols, will take place on April 24–25 in Visalia, California, at the Wyndham Hotel. Highlights include a Friday night dinner with a bus trip to a Fresno Grizzlies minor league baseball game, where attendees can enjoy a party deck, good food, a bartender, and fireworks. The SAR color guard is set to present the colors at the game. Thursday night will feature a dinner at Venice Press, known as one of the best restaurants in the Central Valley. The event promises fun activities, convenient transport, and reasonable lodging costs.

**136th SAR Congress President General John L. Dodd (2023-24):** John announced that registration for the upcoming event in Greensboro, NC will open in May, and that all delegates must register. Hotel reservations will be available soon. Congress offers a valuable opportunity for social interaction, allowing participants to exchange ideas about effective and less effective practices, while leadership meetings focus on committee work. If you are considering attending, please notify Chris Cerello as soon as possible—even if you are unsure—because registration closes on June 2. California can send up to 38 delegates to Congress.

**Additional Comments:** Several notable remarks were made. Members were reminded to contact Duncan to confirm chapter donations to the Library and George Washington fund, with reports due by the end of January. President Ferris noted California leads nationally in 250 reports with 75 golds, alongside DAR and CAR. Scott Nichols suggested distributing challenge coins at parades, and J. Dodd mentioned discounted 250 pins and challenge coins available from Ranger. Philip reported Bill Nay was pleased with expense approval for his project. PG Elston presented Ben Hobbins with the Gold Roger Sherman award for his national service, honoring Roger Sherman as the only person to sign all four foundational state papers of the United States.

At 2:25pm, at President Ferris suggestion, Brandon Villardi motioned to adjourn 150th Board of Mangers Meeting. Chris Cirello provided the second. The motion passed unanimously.



# TRUSTEES of the CASSAR INVESTED FUNDS

## CASSAR Board of Managers Meeting

October 1, 2025

The elected Trustees of the CASSAR Invested Funds are Chairman Stephen R. Renouf (2023-2026), John L. Dodd (2024-2027), and Kevin L. Bidenkap (2025-2028). The Trustees of the Invested Funds operate under CASSAR Bylaw No. 4, Section 12.

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

The beginning value of the Invested Fund on October 1, 2024:  
**\$537,802.22.**

The ending value of the Invested Fund on September 30, 2025:  
**\$543,086.22.**

During the 12-month period described above, the total funds in the accounts increased by **\$5,284.00**. The increase was due to \$45k in unrealized gains net of fees due to a strong stock market, less a 25k withdrawal for SARF Donations, and less \$15k transferred to CASSAR from the Unallocated fund.

**LIFE MEMBERSHIP FUND**

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

Fund Investment as of September 30, 2025:

<b><u>LIFE MEMBER FUND:</u></b>	<b>\$197,235.41</b>	
Cash	<b>\$10,830.32</b>	<b>5.49%</b>
Equities	<b>\$103,261.63</b>	<b>52.35%</b>
Fixed Income	<b>\$63,229.46</b>	<b>32.06%</b>
Alternatives	<b>\$19,914.00</b>	<b>10.10%</b>

**Return: 8.20% Last 12 Months; 5.48% Since Inception (on 10/7/2010)**

Allocations (On 10/1/2025):	ACTUAL
<b>Cash</b>	
Global Cash	5.61%
<b>Equities</b>	
US Large Cap Growth	15.00%
US Large Cap Value	14.92%
US Small Cap Growth	4.96%
US Small Cap Value	4.96%
International Equities	8.26%
Emerging Markets Equities	4.26%
<b>Fixed Income</b>	
Short Term Fixed Income	15.45%
US Fixed Income Taxable	16.49%
<b>Other</b>	
REITs	1.81%
Commodities	3.44%
Equity Return Assets	4.84%

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 September 30, 2025:

<b>EDUCATION FUND:</b>	<b>\$140,392.24</b>	
Cash	\$7,434.91	5.30%
Equities	\$66,086.22	47.07%
Fixed Income	\$51,903.25	36.97%
Alternatives	\$14,967.86	10.66%

**Return: 8.24% Last 12 Months; 5.91% Since Inception (on 10/7/2010)**

Allocations (On 10/1/2025):	ACTUAL
<b>Cash</b>	
Global Cash	5.44%
<b>Equities</b>	
US Large Cap Growth	13.89%
US Large Cap Value	13.92%
US Small Cap Growth	2.46%
US Small Cap Value	6.27%
International Equities	7.32%
Emerging Markets Equities	3.22%
<b>Fixed Income</b>	
Short Term Fixed Income	18.23%
US Fixed Income Taxable	18.60%
<b>Other</b>	
REITs	1.86%
Commodities	3.95%
Equity Return Assets	4.84%

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 September 30, 2025:

<b><u>PERMANENT FUND:</u></b>	<b>\$133,119.06</b>	
Cash	\$5,883.84	4.42%
Equities	\$82,850.24	62.24%
Fixed Income	\$26,834.68	20.16%
Alternatives	\$17,550.30	13.18%

**Return: 9.46% Last 12 Months; 6.65% Since Inception (on 10/7/2010)**

Allocations (On 10/1/2025):	ACTUAL
<b>Cash</b>	
Global Cash	4.52%
<b>Equities</b>	
US Large Cap Growth	16.49%
US Large Cap Value	17.71%
US Small Cap Growth	2.44%
US Small Cap Value	7.07%
International Equities	14.31%
Emerging Markets Equities	4.23%
<b>Fixed Income</b>	
Short Term Fixed Income	9.00%
US Fixed Income Taxable	11.07%
<b>Other</b>	
REITs	4.61%
Commodities	4.71%
Equity Return Assets	3.84%

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

## **CONGRESS FUND**

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

Fund Investment as of September 30, 2025:

<b>CONGRESS FUND:</b>	<b>\$42,670.42</b>	
Cash	\$1,859.87	4.36%
Equities	\$26,907.36	63.06%
Fixed Income	\$8,083.64	18.94%
Alternatives	\$5,819.55	13.64%

**Return: 10.16% Last 12 Months; 8.14% Since Inception (on 01/06/2020)**

Allocations (On 10/1/2025):	ACTUAL
<b>Cash</b>	
Global Cash	4.45%
<b>Equities</b>	
US Large Cap Growth	16.81%
US Large Cap Value	17.57%
US Small Cap Growth	2.41%
US Small Cap Value	7.10%
International Equities	14.96%
Emerging Markets Equities	4.21%
<b>Fixed Income</b>	
Short Term Fixed Income	8.95%
US Fixed Income Taxable	9.93%
<b>Other</b>	
REITs	4.46%
Commodities	4.40%
Equity Return Assets	4.75%

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

## **UNALLOCATED FUND**

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

Fund Investment as of September 30, 2025:

### **UNALLOCATED FUND: \$29,669.09**

Cash	<b>\$3,041.65</b>	<b>10.25%</b>
Equities	<b>\$8,984.83</b>	<b>30.28%</b>
Fixed Income	<b>\$13,843.95</b>	<b>46.67%</b>
Alternatives	<b>\$3,798.66</b>	<b>12.80%</b>

**Return: 7.18% Last 12 Months; 3.49% Since Inception (on 7/22/2015)**

Allocations (On 10/1/2025):

ACTUAL

#### **Cash**

Global Cash 10.41%

#### **Equities**

US Large Cap Growth 7.61%

US Large Cap Value 7.20%

US Mid Cap Growth 1.07%

US Mid Cap Value 1.15%

US Small Cap Growth 1.02%

US Small Cap Value 1.02%

International Equities 8.14%

Emerging Markets Equities 3.10%

#### **Fixed Income**

Short Term Fixed Income 15.37%

US Fixed Income Taxable 20.47%

International Fixed Income 4.83%

Inflation Linked Securities 1.96%

High Yield Fixed Income 1.92%

Emerging Markets Fixed Income 1.96%

#### **Other**

Equity Return Assets 12.77%

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

**RECENT ACTIVITY.**

On January 24, 2025, the Trustees had a conference with the Morgan Stanley Advisor. We discussed the performance of each of the accounts last year, and found the performance was in line with expectations. We implemented a long-discussed allocation change for each of the accounts, reducing the allocation to short-term bonds, and increasing the allocation to Core bonds. Finally, we discussed the under-performance of the Neuberger Berman Large Cap Value fund – which will be monitored for possible replacement.

On September 30, 2025, the Trustees had a conference with the Morgan Stanley Advisor. First, we discussed the performance of each of the individual funds. Second, we looked at the asset allocation of the accounts, noting the change to longer dated bonds from the spring. With a steeper yield curve going forward, it looks like the funds will benefit from that added duration. At this time, it was agreed that no change to the allocations was warranted. Lastly, we highlighted the allocation to the JP Morgan Hedged Equity fund in light of the market valuations, and the reduced volatility that the position adds to the 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  
2024-2027

S/  
Kevin L. Bidenkap  
Trustee  
2025-2028