

Open Forum

Dues Campaign and Member Reconciliation



California Society



Dates to Remember

- **September 1, 2020** — New members do not pay 2021 dues if admitted to Society on or after this date.
- **October 1, 2020** — CASSAR Annual Dues Campaign begins.
- **November 1, 2020** — reinstatements or transfers held until 2021.
- **December 15, 2020** — Cut-off date for Annual Member Dues.
- **January 1, 2021** — CASSAR must have a clean roster.
- **January 5, 2021** — Chapters report membership per CASSAR bylaws and state and national dues must be paid to CASSAR.



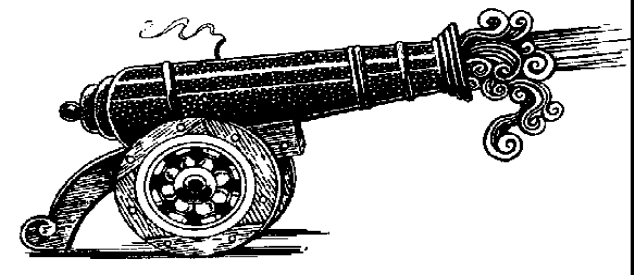
Why These Dates?

December 15th and **January 5th** are set by the **California Society bylaws** to provide sufficient time to prepare the California Society Membership and Financial Reconciliation Report that must be submitted to the National Society by the last working day in January.

NOTE: Transactions are not processed until the National Reconciliation Report is complete.

**In 2021 the National Reconciliation Report must be filed by
January 29, 2021.**

Life Members — Three Types



What are they?

- California Life Member — Old Program
 - California Life Member — New Program
 - NSSAR Life Member
- plus:
- Emeritus status



California Old Life Members

Most of the Life member in each of the chapters will be in the “OLD” Life category. These life members were under an older program where the California Society agreed to pay the State, National Dues and to pay the chapters a portion of their dues annually.

Members can no longer sign up for the “Old” California Life program.



California “New” Life Membership

After 2013 a member that desired to become a California Life member had to first become a NSSAR life member and receive a National Life member number.

After being accepted as an “National” life member the member may apply to the California Society to be a California Life Member under the “New” program.

The New California Life program works in much the same way as the “Old” California program it just is different in how the member becomes a California Society Life Member.

Life Members — New Program

CASSAR LIFE MEMBERS DOCUMENTATION SHEET - NEW PROGRAM							
	Society:	Master		Reconciliation as of January 1, 2021			
	<u>Nat'l #</u>	<u>First Name</u>	<u>Middle Name</u>	<u>Last Name</u>	<u>Chapter</u>	<u>Birthdate</u>	<u>Emeritus</u>
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NSSAR Life Member

A California Society member may have paid to become a NSSAR Life member and received his national number and decided not to become a California Society Life Member for a variety of reasons: the cost, planning to move out of state, etc.

If a California Society member paid to be a NSSAR life member but did not apply to become a California Life member then he is a NSSAR life member only and must pay both chapter dues and California State dues during the dues campaign.

NSSAR Life Members

NATIONAL LIFE MEMBERS DOCUMENTATION SHEET					
	Society:	Master		Reconciliation as of January 1, 2021	
Do not include CASSAR Life Members whose National dues are paid under the CASSAR LM Fund					
	<u>Nat'l #</u>	<u>Natl Life #</u>	<u>First Name</u>	<u>Middle Name</u>	<u>Last Name</u>
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Emeritus Members

Emeritus Member is a member that has 50 years of paying dues to the Sons of the American Revolution. Emeritus status is based on the number of TOTAL years of Active membership of a member. They do NOT have to be continuous.

The California Society must apply to have a member designated as Emeritus Member.

The California Society pays no National dues for Emeritus Members.

Emeritus Lifetime Members (50 years continuous service)

<u>EMERITUS MEMBERS DOCUMENTATION SHEET</u>						
	Society:	Master	Reconciliation as of January 1, 2021			
Emeritus members are compatriots who have paid dues in at least 50 years						
					<u>CASSAR LM</u>	
-	<u>Nat'l #</u>	<u>First Name</u>	<u>Middle Name</u>	<u>Last Name</u>	<u>Y or N</u>	<u>Chapter</u>
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Memorial Members

Some Chapters have submitted new member applications this past year and in previous years to have members parents or grandparent be admitted as a Memorial Member of the National Society.

A Memorial Member is not an active member and should be listed as a deceased member of the chapter so the member can be removed from the roster.



Chapter Rosters

Chapters are required to submit a **2020** membership roster and a **2021** membership roster.

WHY?

The only way to cross check the membership of the society is to have a past roster and a current roster.



Junior Members

- If a junior member is 18 on January 1st of 2021 then he becomes a Regular member and dues need to be collected as a Regular member.
- Remember that the chapter or the California Society does not get any dues for Junior members; Chapters should consider just carrying their junior members and just paying their \$5 dues fee.
- Birth year is the most important, if you do not know a month or day use June 15th and it will work fine; **the year of birth must be correct.**
- The cost to collect the \$5 can be as much or more as the \$5.



Deceased Members

- We all have members that pass away during the year, our organization is an aging organization.
- Again the exact dates are not as important as knowing that it was on or before December 31st
- If a member dies after January 1st but before January 15th send me an email and I will make the correction in the National Reconciliation Report to remove the member: Do Not Send a revised report.



New Members After December 15th

- New members that are received after December 15th 2020, National will make the correction in the Reconciliation Reports.
- New Members admitted before December 15th need to be included in the chapters Reconciliation Report.
- I keep a file on all applications received in December and will check your report and add new members if they are missing.
- Members that paid their dues after December 15th should be reported as dropped members and go through the process to reinstate.



Dual State Members

A **Dual State Member**, is a member that pays his National, State and Chapter dues in another state and only pays chapter and state dues to the California Society.

The Chapter must collect dues for all Dual California Society Members and to list them in the Reconciliation Report.

The chapter has the obligation to find out if the Dual Member has paid their National Dues through another state.

According to National bylaws, Dual state members cannot hold chapter or state executive board or committee chair positions in the state where they are a Dual member.

Dual State Members

CASSAR DUAL MEMBERS DOCUMENTATION SHEET						
	Society: Master			Reconciliation as of January 1, 2021		
	<u>Nat'l #</u>	<u>First Name</u>	<u>Middle Name</u>	<u>Last Name</u>	<u>Chapter</u>	Primary <u>State is CA</u> "y" or "n"
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Transfers In and Out and Reinstatements

- Don't let specific dates be your undoing.
- Key dates for the purpose of the report are **before September 1** and **after September 1**
- If a member was transferred or reinstated in the spring use June 15, 2020 as the date if you do not know the exact date. The 15th of the month will always work for the day on all transactions.



Dates on Report

Where to go to find information:

- Log into the National web site
- On the navy blue bar there is a tab "**Quick Links**" hit this tab.
- Go to **Member Info** (yellow)
- Login into site (Note this has a different login name and password.)
- Type in the **last name** of the member and hit search.
- Go into **select member** and look in **member status**.



Information Needed

When collecting dues you need to confirm the following:

- Name
- Address
- Email (**important!**)
- Phone number(s)
- Need to confirm information on **life member**.

Note: CASSAR policy is; after two years of no contact with a life member the member will be considered deceased.



General Comments

- Fill in all fields in the work sheets.
- **Do not delete** any of the work sheets.
- **Do not change any of the formulas** on any of the sheets.
- Begin to fill in the Reconciliation Report as soon as you receive the report in September/October.
- Call Fred Schuster if you need assistant (909) 985-7510
- Again, call Fred Schuster if you need Assistance **(909) 985-7510**



QUESTIONS



OPEN FORUM FOR QUESTIONS