

# Open Forum

February 17, 2021



***California Society***

***A year in review***



## *Dates to Remember*

- September 1, 2021 — New members do not pay 2022 dues if admitted to Society on or after this date.
- October 1, 2021 — CASSAR Annual Dues Campaign begins.
- November 1, 2021 — reinstatements or transfers held until 2022.
- December 15, 2021 — Cut-off date for Annual Member Dues.
- January 1, 2022 — CASSAR must have a clean roster.
- January 5, 2022 — Chapters report membership per CASSAR bylaws.
- January 10, 2022 — Chapter dues paid to CASSAR.
- January 31, 2022 — Chapter Change of Officers Form due.
- March 31, 2021 — Chapter Annual Report due to State Secretary.
- April 1, 2021 — Chapter Taxes need to be filed for year.



# Why These Dates?

**December 15<sup>th</sup>** and **January 5<sup>th</sup>** 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:** Transaction are not processed until the National Reconciliation Report is complete.

**In 2022 the National Reconciliation Report must be filed by January 31, 2022 per NSSAR bylaws.**



# Life Members — Four Types

**Life members continued to cause an issue in 2021 and they were one of the largest sources of errors.**

- California Life Member — Old Program
- California Life Member — New Program
- NSSAR Life Member
- Emeritus Member



# Emeritus Members

**Emeritus Lifetime 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 placed into the Emeritus Life Program.

We need to see if we have any members that are eligible to Emeritus Life members so that we can change their status in the society.



# 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 of the society, however the chapters need to keep track of their Memorial Members.



## Chapter Rosters

Chapters are required to submit a current year membership roster annually to CASSAR, this is done with the Reconciliation Report.

Chapters need to keep accurate information on their membership.



# Junior Members

- If a junior member is 18 on January 1<sup>st</sup> of 2022 then he becomes a Regular member and dues need to be collected as a Regular member.
- In 2021 the Society lost 1/4 of its Junior members.





# Deceased Members

- We all have members that pass away during the year, our organization is an aging organization.
- There were almost twice as many deceased members than were reported on the Reconciliation Reports. This creates issues for the chapters membership and for the society.
- Deceased Members have to be reported to California Society State Secretary so the proper paperwork can be filed.
- This is also a “drop” of \$55 on the annual Reconciliation Report for the chapters when reported correctly.

# *Wrapping Up*



- Once the chapter sends in the Reconciliation Report several things happen.
- The information from each report is combined and put into the NSSAR format that used by all 55 societies to report membership.
- The State Society must pay there share of of their national dues.
- National goes over the report using all state transaction submitted during the year and determines if there are any errors in the report.
- The NSSAR report is sent back to the state to have the changes made in the original report, and to challenge the changes.
- Final payment is made to NSSAR.

# *Wrapping Up*



- NSSAR sends the state society a January 1 Report with all the current year information.
- The NSSAR Roster becomes the Gold Standard for the new year and the starting point for each chapter.
- The 2020-2021 Reconciliation Report had six errors.
- In 2021 the California Society was able to reconcile our membership down to the dollar with NSSAR once the modifications were made that NSSAR found in the report.
- Now the NSSAR Roster must be compared to the CASSAR Roster.



# Annual Report



The CASSAR bylaws require that each chapter file with the California State Secretary an annual report.

The NSSAR, The CASSAR Articles of Incorporation, and the CASSAR bylaws have specific information that is required to be reported in the chapters annual report.

The California State Secretary sends out an example of the format of a chapter annual report that has all of the elements that are needed in the report.

The report needs to be short and no more than two pages long.



# Elements of Chapter Annual Report

- (1) Chapters 2021 Elected Officers
- (2) Chapters Appointed Officers and Committee Chairs
- (3) Membership summary
- (4) Dues collected, and dues paid
- (5) Who in the chapter can sign checks, note that the national society discourages the practice of the secretary being a signatory on the chapter banking account.
- (6) Name and address of the banking institution where the chapter does their banking
- (7) The banking account number-I only ask for the last four digits of the account in my example.
- (8) Balance in the account as of December 31, 2020
- (9) Name, address, and phone number of the chapter treasurer.

Along with these nine (9) elements, a brief summary of the past years activities should be included in the report.

The example is provided for uniformity in the report.