

NATIONAL SOCIETY SONS OF THE AMERICAN REVOLUTION

OFFICERS AND COMMITTEE CHAIRMEN REPORTS

SAR Pledge: “We descendants of the Heroes of the American Revolution who, by their sacrifices, established the United States of America, reaffirm our faith in the principles of liberty and our Constitutional Republic, and solemnly pledge ourselves to defend them against every foe.”

GENERAL OFFICERS

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General Officer's Report Form

General Officer's Name: John L. Dodd		
Mailing Address: 17621 Irvine Blvd., Ste. 200		
City: Tustin	CA	ZIP Code: 92780
Telephone Number: 714-815-4426	E-Mail Address: johnldodd@twc.com	
Filing Date: January 28, 2024	SAR General Office: President General	

Reports, Activities, and Recommendations

After the Fall Trustee meeting, I participated in a site visit for the Congress venue in Lancaster, PA, which promises to be a great Congress. Hope to see you all there! I then attended the South Atlantic District Meeting with the commemoration of the Battle of Kings Mountain, followed by the Central District meeting in Ohio.

I attended the Volunteer Appreciation Lunch in Louisville, then went to Nashville to meet with Gary Sinise for the presentation of the Distinguished Patriotic Leadership award, after which I stopped by Andrew Jackson's Hermitage, resulting in the arrangements for the memorial we will be unveiling the Sunday after this Leadership meeting. November closed out with my own California board of managers and Western District meeting in Long Beach.

In December, I was privileged to bring our SAR message to listeners of Mike Rowe's "The Way I Heard It" podcast, culminating with inducting Mike, his father, John, and producer Chuck Klausmeyer into the SAR. The next weekend brought the memorable Boston Tea Party commemoration.

In January, I participated in the Special Trustees' Meeting, where we approved the infrastructure phase of the Education Center and Museum. I closed the month by attending the annual meeting of the Georgia Society.

Plans for February include the Colorado state meeting, George Washington birthday celebrations in New Jersey and San Diego, followed by our Leadership meeting in Louisville.

Thank you all again for allowing me to serve as President General.

Sons of the American Revolution General Officer's Report Form

General Officer's Name: Darryl Addington		
Mailing Address: 5038 Ashford Crest Lane		
City: Charlotte	State: NC	ZIP Code: 28226
Telephone Number: 423-737-2805	E-Mail Address: cutterdoc@hotmail.com	
Filing Date: 1/30/2024	SAR General Office: Secretary General	

Reports, Activities, and Recommendations

(Note that additional paper may be used as required to reply to this prompt below; please include all relevant information deemed necessary. Please put the General Officer's name and General Officer's position at the top of each supplemental page and attach them with this form.):

Sept. 8 - TNSSAR District Meeting
 Sept. 9 - Sycamore Shoals Greetings for PG
 Sept. 12 - Congress Planning Zoom
 Sept. 14 - Eagle Scout Zoom
 Sept. 21 - Leadership
 Sept. 30 - NCSSAR BOM in Raleigh, NC
 Oct. 6 - South Atlantic District Meeting
 Oct. 7 - Kings Mountain National Event
 Oct 15-16 - Visited Louisville and HDQ
 Oct. 20-22 - South Central District Meeting
 Oct. 24 – Zoom, Strategic Committee
 Oct. 28 – Zoom, GASSAR BOM
 Oct. 29 – Zoom, EX-COM
 Nov. 3-4 - CASSAR State Meeting
 Nov 6 – Zoom, Communications Committee
 Nov 9 - Mecklenburg Chapter Meeting
 Nov. 20 – Zoom, Education and Museum Committee
 Nov. 20 – Zoom, Strategic Committee
 Nov. 30 – Zoom, Communications Committee
 Nov. 30 – Zoom, HDQ Committee
 Dec. 4 – Zoom, Education and Museum
 Dec. 4 – Zoom, Congress Committee
 Dec. 5 – Zoom, Museum Committee
 Dec. 5 - Communications Committee
 Dec. 13 – Zoom, Budget Committee
 Dec. 13 - Communications Committee
 Dec. 18 – Zoom, Education and Museum Committee
 Dec. 18 – Zoom, Strategic Committee
 Dec. 22 – Zoom, Budget Committee
 Dec. 27 – Zoom, EX-COM
 Dec. 28 – Zoom, Education and Museum
 Jan. 4 – Zoom, Education and Museum

- Jan. 27 – Zoom, EX-COM
- Jan. 11 – Zoom, Foundation Board
- Jan. 13 – Zoom, Trustee Meeting
- Jan. 15 – Zoom, Education and Museum
- Jan. 17 - Keynote Speaker at Cowpens
- Jan. 22 - Education and Museum
- Jan. 22 - Americanism
- Jan. 27 - Cowens Ford National Event and NCSSAR BOM

Sons of the American Revolution General Officer's Report Form

General Officer's Name: Michael J. Elston		
Mailing Address: 16094 Olmstead Lane		
City: Woodbridge	State: VA	ZIP Code: 22191
Telephone Number: 703-915-9396	E-Mail Address: elston.sar@gmail.com	
Filing Date: 8 February 2024	SAR General Office: Treasurer General	

Reports, Activities, and Recommendations

(Note that additional paper may be used as required to reply to this prompt below; please include all relevant information deemed necessary. Please put the General Officer's name and General Officer's position at the top of each supplemental page and attach them with this form.):

Bylaw 7 of the National Society provides that the Treasurer General is the Chief Financial Officer of the National Society, and his duties include, but are not limited to, providing financial advice and counsel to the Executive Committee, the Board of Trustees, Committee Chairmen, and when called upon to do so by an elected member of the SAR Foundation Board.

Since the election and installation of officers at the 2023 Congress, I have established a weekly call on Mondays with the Director of Finance to discuss the financial issues that arose the week before and that are expected to arise in the week ahead. I have reviewed and approved all vendor payments that exceed \$500, and I have reviewed and approved for posting the monthly financial statements as prepared by the Director of Finance. I have also had regular contact with the Merchandise Department and the Merchandise Committee chairman in order to advance the President General's vision for SAR merchandise. In addition to encouraging the efforts around 250th anniversary signature event merchandise and higher quality products, I requested and received the President General's approval for an increase in the cap on inventory value.

Much of my time has been taken up by assessing the reasons that spending vastly exceeded income during 2023 and taking initial steps to get spending under control. Nonetheless, the organization had to borrow significantly from its line of credit to pay its expenses in the final months of the year. As a result, I have worked to develop cost reduction and income enhancement proposals to begin reducing the debt incurred in 2023.

Additionally, I have attended the following meetings and events since my September 2023 report:

- A meeting of the George Washington Chapter, Virginia SAR, and the President General's wreath laying at Arlington National Cemetery (September 9).
- Meetings of the Budget Committee (September 11 and 18).
- Virginia SAR Semi Annual Meeting, Winchester, VA (Sept. 15-16), including dedication of Daniel Morgan marker and reenactment of the Winchester portion of the Beeline March.
- The Fall Leadership and Board of Trustees Meeting (Sept 21-23).
- Wreath laying at the grave of Thomas Nelson Jr. (representing PG) (Oct. 19).

- Yorktown Victory Parade and Patriotic Exercises (Oct. 19).
- Central District Meeting (Oct. 21) and Milford, OH, grave marking for five patriots (Oct. 21).
- Michigan SAR grave marking for Nathan Burpee, Grand Blanc, Michigan (Oct. 27).
- Budget Committee Meeting (Oct. 27).
- Great Lakes District Meeting, Bay City, Michigan (representing PG) (Oct. 28).
- Executive Committee Meeting (Oct. 29).
- California SAR Board of Managers Meeting in Long Beach, CA (Nov. 2-4).
- Dinner with the UK Chapter President, London (Nov. 26).
- Battle of Great Bridge Commemoration (representing PG), Chesapeake, VA (Dec. 2).
- Budget Committee Meeting (Dec. 8).
- Delaware SAR Ratification Day Dinner (representing PG), Wilmington, DE (Dec. 9).
- Medals and Awards Committee Meeting (Dec. 14).
- 250th Anniversary of the Boston Tea Party events, Boston, MA (Dec. 15-16).
- Strategic Planning Committee Meeting (Dec. 18).
- Executive Committee Meeting (Dec. 27).
- Special Meeting of the Board of Trustees (Jan. 13).
- Strategic Planning Committee Meeting (Jan. 18).
- Audit Committee Meeting (Jan. 22).
- Executive Committee Meeting (Jan. 24).
- Investment Committee Meeting (Jan. 30).
- SAR Foundation Board Meeting (Feb. 2).
- Merchandise Committee Meeting (Feb. 5).
- Executive Committee Meeting (Feb. 6).

I look forward to seeing my fellow compatriots in Louisville.

Sons of the American Revolution

General Officer's Report Form

General Officer's Name: Edmon McKinley		
Mailing Address: PO Box 847		
City: Thomasville	State: Alabama	ZIP Code: 36784
Telephone Number: 334-636-4882 or 334-830-5604	E-Mail Address: edmonhmckinley@bellsouth.net	
Filing Date: 2/5/2024	SAR General Office: Chancellor General	

Reports, Activities, and Recommendations

(Note that additional paper may be used as required to reply to this prompt below; please include all relevant information deemed necessary. Please put the General Officer's name and General Officer's position at the top of each supplemental page and attach them with this form.):

This report covers from Fall Leadership 2023 until February 5, 2024. In that time, I have done the following:

1. At Fall Leadership, I attended meetings of the Executive Committee, Bylaws Committee, and Legal Advisory Committee in my capacity as Chancellor General.
2. Consulted with the ALSSAR President about Copyright/Trademark issue.
3. Reviewed and approved the Master Service Agreement for Mission Data to be assigned to Growth Acceleration Partners LLC.
4. Reviewed and approved a request for a Compatriot to use our logo for a grave marking.
5. Consulted with Derek Brown regarding a potential copyright issue.
6. Reviewed French Society's proposed Standard Contract Clauses involving EU.
7. Reviewed the Confidentially Agreement between City National Bank of Florida and NSSAR.
8. Reviewed the Confidentially Agreement between PLC Management LLC and NSSAR.
9. Consulted with Chancellor Chuck of the GSSAR regarding chapter dissolution and distribution of assets.
10. Consultation with Missouri state Chancellor Hawk regarding dual state memberships.
11. Correspondence with Compatriot Kern regarding podcast issues.
12. Discussions with PG Dodd and Compatriot Lee Popham regarding donation of Arizona home site to the SAR Foundation.
13. Consultation with Compatriot Rob Sexton and review and discussion of Root Tech Exhibit Agreement.
14. Consultation with German Society Chancellor John Fulwider regarding bylaws.
15. Correspondence with Compatriot Hurst regarding bylaw changes.
16. At the request of PG Dodd, worked with the Legal Advisory committee regarding record copy redaction and release policy.
17. Assisted in formulating suggested court order language for the GSSAR Registrar involving birth certificates.
18. Involved in numerous phone conversations and emails regarding the contract with AL Post concerning the build out of the NSSAR Education Center and Museum and extensive reviews and comments regarding the contract. Numerous consultations with PG Alter, Compatriot Popham, and Mr. Chris Carmichael.
19. Consulted with Daniel Brashear in Merchandising regarding Navy use of SAR blue binders and certificates.
20. Ongoing consultation with Ladies Auxiliary NSSAR regarding bylaw language.

21. Conversation with Compatriot Jeff Jones regarding ghost guns.
22. Consultation with Compatriot Weissinger regarding "you in SAR" videos.
23. Consultation with KSSAR Chancellor Brian Vazquez regarding court martial and reinstatement.
24. Investigating copyright and trademark for Revolutionary War Rarities logo and podcast.
25. Conversation with Chris Moberg VPG North Central District concerning dumping of tea.
26. Consultation with Compatriot Callanan regarding electronic distribution of *SAR Magazine*.
27. Email correspondence with the VPG of Great Lakes district, Compatriot David Van Hoof, discussing legislation to protect veterans' graves.
28. Review of Congress rules with Compatriot Callanan.
29. Correspondence with VPG of North Central District, Chris Moberg, concerning DAR/SAR recruitment.
30. Reviewed emails involving New York and Boston marathons.
31. Advised Compatriot Jim Griffith regarding selling advertising for Revolutionary War podcast.
32. Consulted with the SAR Foundation on several matters.

Since Congress, I have attended the following meetings:

1. North Carolina Society BOM
2. South Atlantic District Meeting
3. Ohio Society BOM
4. TXSSAR Annual Meeting
5. Great Lakes District Meeting
6. California Society Annual Meeting
7. Georgia Society BOM
8. Numerous Executive Committee meetings via Zoom
9. Several SAR Foundation meetings via Zoom

It is a pleasure to serve as your Chancellor General and please feel free to contact me if I can assist you in any way.

Respectively Submitted,

Edmon H. McKinley
Chancellor General 2023-2024
NSSAR

Sons of the American Revolution

General Officer's Report Form

General Officer's Name: Gary O Green		
Mailing Address: 4225 Dutch Cove Ct		
City: Castle Hayne	State: NC	ZIP Code: 28429-1301
Telephone Number: 910-612-3676	E-Mail Address: garyogreen@gmail.com	
Filing Date: 26 Jan 2024	SAR General Office: Genealogist General	

Reports, Activities, and Recommendations

(Note that additional paper may be used as required to reply to this prompt below; please include all relevant information deemed necessary. Please put the General Officer's name and General Officer's position at the top of each supplemental page and attach them with this form.):

- **Goals**

- **Reduce the backlog of review of applications to four weeks**

Backlog status	New	Oldest	Sup	Oldest
▪ 31 Dec 2022	13 wks	05 Oct	26 wks	7 Jul
▪ 31 May 2023	4 wks + 1 day	03 May	24 wks	15 Dec
▪ 21 Aug 2023	4 wks + 1 day	19 Jul	22 wks + 6 days	10 Mar
▪ 31 Dec 2023	8 wks + 1 day	07 Nov	33 wks + 2 days	10 May

- **Attain at least a 90% approval rating for both new and supplemental applications**

Percentage of applications approved 1 Jan-31 Dec 2023

- New – 93.1%
- Supplemental – 78.3%

- **Reduce the time per genealogy staff member review of applications to one hour or less**

Using the estimate of 50 weeks at 40 hours per week times [8 genealogists for 38 weeks & 7 genealogists for 12 weeks] = 15,520 hours

4253 applications were Approved/Re-Reviewed/Withdrawn/Pended = 2.41 hours per application

- **Status of Applications 1 Jan - 31 Dec 2023 - Membership count: 38,564**

Applications Received

- Regular & Jr – 3284 & 377 Jr
- Supplemental – 1144
- Memorial - 64
- Total - 4869

Applications Registered - 3917

Pended applications	New	Sup	Admin	Total
• 1 Jan - 31 Dec	471	209	150	830

Applications Re-Reviewed – 438

Applications and Patriots Flagged in PRS – 241

Total to date - 406

Need to address 1085 that are flagged by DAR – 185 are applications approved after 1 Jan 2012

Expedited Process Applications – 56

Unreviewed applications

- New Members - 334
- Jr Members - 44
- Supplementals - 680
- Memorials - 2

- **Accomplishments**

- Conducted a Genealogist General's Forum in March & May
- Encouraged the addition of a Genealogy subcommittee to review Flagging requirements
- Supported the Records Digitization and GRS Committee recommendations to PRS
- Submitted opinion on seven appealed applications
- Participated in revising the in-house staff review process for applications
- Visited SAR Genealogy Staff in Louisville in 28-30 August 2023

- **Goals for 2023-2024**

- Review the over 1,000 SAR patriots that are currently flagged by the DAR to find out if they no longer meet SAR genealogy standards.
- Sustain the new application approval time at four to five weeks
- Reduce the supplemental application approval time to 10 weeks
- Coordinate the development of a new application that will allow the submission of supporting documents and the application digitally.

- **Planned activity**

- Present an updated Registrar Training class once the online application system is updated
- Add an approved but unfunded 8th genealogist to the staff
- Investigate the procedural requirements for automated applications purchase
- Prepare a discussion of training new chapter genealogist/registrar

Sons of the American Revolution General Officer's Report Form

General Officer's Name: William Allen Greenly		
Mailing Address: 34 Tiffany Drive		
City: Rehoboth Beach	State: DE	ZIP Code: 19971
Telephone Number: 404-788-8824	E-Mail Address: wagreenly@gmail.com	
Filing Date: Jan. 31, 2024	SAR General Office: Registrar General	

Reports, Activities, and Recommendations

Emails to New Members

Since 09/01/2023 I have sent 1,369 emails to new members.

Since becoming Registrar General in July 2022, I have sent out over 5,500 emails to new members.

I have been tracking bounced emails since July 2023. Our current bounce rate is 7.6%. Each week, I send Jon Toon the data on the bounced emails, and he sends me back corrections. Once I receive the corrections, I resend my welcome email to those members. If there are no bounce backs, I let Jon know, and he corrects the Blue Database. If any bounce, we continue the process until we have the correct email address. We do this to ensure that the email addresses in the Blue Database are correct.

I continue my weekly telephone conversations with Jon Toon covering registration and application issues. We also cover his schedule and where we are with our progress in other areas.

ExCom Meetings Attended

I have attended the following ExCom meetings:

09/21/2023 Fall Leadership

12/27/2023 Zoom

01/24/2024 Zoom

Trustee Meetings Attended

09/23/2023 Fall Leadership

01/13/2024 Zoom

Registrar General Handbook Description Ad Hoc Committee

Ad Hoc committee formed to rewrite the handbook description for the Registrar General. Committee members: Allen Greenly, PG C. Bruce Pickette, Doug Collins, Tony Vets, and Russ DeVenney

Meetings

12/07/2023 Zoom

12/21/2023 Zoom

01/11/2024 Zoom

Committee Meetings Attended

09/07/2023	Veterans Committee	Zoom
09/08/2023	Young Members Committee	Zoom
09/14/2023	Eagle Scout Committee	Zoom
10/16/2023	Membership Committee	Zoom
10/23/2023	Young Members Committee	Zoom
11/29/2023	Website Sub-Committee	Zoom
11/30/2023	Headquarters & Maintenance	Zoom
12/05/2023	Communications Committee	Zoom
01/10/2024	Website Sub-Committee	Zoom

District and State BOM Meetings Attended

08/11/23-08/12/2023	Atlantic Middle States District
08/25/23-08/26/2023	South Central District
10/20/23-10/21/2023	Central District
10/28/2023	Georgia Society BOM
11/02/2023-11/04/2023	California Society BOM
01/26/2024-01/27/2024	Georgia Society Annual

Other Events Attended

09/02/2023	Cooch's Bridge	Newark, DE
09/17/2023	Constitution Day	Georgetown, DE
11/12/2023	Delaware Day	Laurel, DE

Other Items

I continue to work with Troy Foxwell and the Delaware Society BOM to form the Lewestown Chapter. The Delaware BOM has voted to approve the formation of the Lewestown Chapter. Our next steps are to send the Constitution and By Laws for the chapter to the State Chancellor for review. We will then have a chapter chartering ceremony to complete the formation of the chapter. We have informed National of the chapter formation.

Sons of the American Revolution

Historian General's Spring Leadership Report

General Officer's Name: T. Brooks Lyles, Jr		
Mailing Address: 557 Lincoln Quarters Lane		
City: Tega Cay	State: SC	ZIP Code: 29708
Telephone Number: (913) 306-4261	E-Mail Address: brooks.lyles@gmail.com	
Filing Date: 5 February 2024	SAR General Office: Historian General	

Reports, Activities, and Recommendations

Since the submission of the Fall Leadership Report, I have visited several states and historic sites as part of District Meetings, participated in several Committee Zoom Sessions, numerous EXCOM Meetings, and the Special Trustee's Meeting. Additional information, activities, and details below:

1. After getting input from Past President Generals and Director of Operations, Mike Scroggins, we completed the third and final content review/edit of the History of the National Society of the Sons of the American Revolution, Volume IV, an Historical Anthology, 2000-2017 by John Thornhill. It was released for print on demand sales and is now available on Amazon in both hard and soft cover versions. Thanks to the late Librarian General Fred Olive, Library Director Cheri Daniels, and Outreach to Schools Committee Chairman Roger Williams for their invaluable assistance in this process.
2. Submitted a review and proposed rewrite of Bylaw 11-Historian General to the Bylaws Committee for review. There were several tasks in the current Bylaw 11 that are out of date and several current programs that were not addressed.
3. We have been working for the last couple of months on developing historical content for the upcoming release of the 2024 SAR Membership Directory. We have focused on the Decade of the Revolution and the eleven annual Signature Events the SAR will be celebrating for our 250th Anniversary. Thanks to Peter Young of America 250, SAR 250th Vice Chair Howard Fisk, History Chair Jeff Thomas, Education Chair Jim Griffith, Museum Curator Zac Distel, and Marketing and Public Relations Manager Drew Hight for their work on this important project.
4. Worked with President General John Dodd on the design and text of the President Andrew Jackson NSSAR 250th plaque being presented at Andrew Jackson's Hermitage in Nashville on Sunday, 3 March 2024, following the Spring Leadership Meeting. This will be a National Color Guard Event.
5. On 30 October, I conducted the eleventh interview in the SAR's Speaking Out About History series with Benjamin Carp on his books The Defiance of the Patriots, The Boston Tea Party, and The Great New York Fire of 1776.
6. On 6 December, I conducted the twelfth interview in the SAR's Speaking Out About History series with Tom Hand of Americana Corner on his book American Triumph, America's Founding through the lives of Benjamin Franklin, George Washington, and John Adams. Both interviews are available on YouTube and at education.sar.org.
7. The Museum Board's Uniform Subcommittee has met 4 times since Fall Leadership and is hard at work developing a comprehensive plan for identifying, uniforming, and equipping the 14 figures specified in the Education Center and Museum plan. Additionally, we are trying to link each of the figures with a certified patriot in the SAR's database. We want these figures to be

real people with real back stories. Ideally, each of these “Proven Patriots” will have descendants who are active Compatriots, but this is proving to be a little more difficult. We are close though and still researching.

8. I was able to speak on the upcoming Lafayette Bicentennial Tour and display the Lafayette Pop Up panels at several District Meetings including the South Atlantic District on 6 October in Gaffney, SC; the Central District on 21 October outside Cincinnati, OH; and the Great Lakes District in Bay City, MI, on 28 October 2023.
9. On 7 October, I participated in the annual National SAR and Color Guard Commemoration of the Battle of Kings Mountain at Kings Mountain National Battlefield Park.
10. Over the weekend of 2-5 November, Diane and I attended the California State and Western District Meetings on the Queen Mary Hotel in Pasadena, California.
11. On 14 November, I participated in a DAR Veterans’ Recognition Dinner in Fort Mill, SC.
12. On 1 December, Diane and I participated in a South Carolina 250 Commission Meeting in Charleston, SC. We are members of the York County, SC 250 Commission. I was able to share information about both the SAR and the American Friends of Lafayette with the commissioners.
13. On 2 December, Diane and I participated, in period attire, in the reenactment of the Charleston Tea Party, an event that predated the Boston Tea Party by almost 2 weeks.
14. Over the weekend of 15-17 December, we participated in the 250th Anniversary of the Boston Tea Party. There were over 10,000 of the public there for the reenactment, and the Henry Knox Regimental Color Guard of the Massachusetts Society led the procession from the South Meeting House down to Griffin’s Wharf for the destruction of the tea. Participating from National were President General John Dodd, Treasurer General Mike Elston, National Color Guard Commander Scott Collins, and National CG Safety Officer Brett Osborn.
15. On 30 December, we participated in a tour of the Old Hammond’s Store and Hays’s Station Battlefields led by Laurens County, SC Historian Durant Ashmore. The Hammond’s Store Battlefield underwent an extensive ground penetrating radar and metal detection study that has completely redefined what was known of the location.
16. On 17 January, I participated in the annual National SAR and Color Guard Commemoration of the Battle of Cowpens at the Cowpens National Battlefield Park.
17. Over the weekend of 26-27 January, Diane and I attended the Georgia Society Annual Meeting in Duluth, GA, and participated in their Registrar Training Program on Friday afternoon. Became a dual member of the Athens Chapter of the Georgia Society.
18. On 31 January, attended the Education Committee Zoom meeting.
19. On 1 February, attended the History Committee Zoom meeting.
20. Over the weekend of 9-10 February, Diane and I attended the Virginia Society Annual Meeting in Richmond, VA. I am a Dual Member of the Col. George Waller Chapter of the VA SAR.
21. Continuing areas of Historian General concentration:
 - a. Expanding the brand recognition and relevance of the SAR in the education, museum, and reenactor communities.
 - b. The Education Outreach App for Apple and Android smart phones.
 - c. The Revolutionary War Education Forum. I am the Chairman of the Forum for the 24-25 Term, and we will be hosting the 2024 Annual Forum Meeting at the SAR Library and HQ’s Building 26-27 March 2024.
 - d. The American Friends of Lafayette and their Educational Pop Up Panels. This is the year the Bicentennial Celebration starts with a parade and ceremony in New York City.
 - e. Sharing SAR activities through social media for those who cannot participate in our live events in person.

- f. Participation on the Strategic Planning Committee – execution and tracking of the SAR 2026 Operational Plan, informing members of their responsibilities.
- g. Developing Battlefield Staff Ride Guides for all the battlefields included in the list of approved SAR Historic Sites and Celebrations.
- h. Museum Board
 - i. Three Pound Congreve Cannon Project Lead
 - ii. Uniform Subcommittee Lead
- i. Reviewing and rewriting the Historian General's job description in the National Society Bylaws.
- j. Identifying and advertising SAR and National 250th Events. Encouraging member participation in their local 250 Commissions.
- k. The ongoing digitization of SAR historical records.
- l. Collecting President General input for the next edition of the SAR History for Volume V – 2018-2030.

Respectfully Submitted: *Thomas Brooks Lyles, Jr.*

Sons of the American Revolution General Officer's Report Form

General Officer's Name: David C. Chaffin, M.D., FACR		
Mailing Address: 3881 Clairmont Drive NE		
City: Cleveland	State: TN	ZIP Code: 37312-5124
Telephone Number: 423-667-8000	E-Mail Address: Davchaffin47@gmail.com	
Filing Date: 3 Feb 24	SAR General Office: Surgeon General	

Reports, Activities, and Recommendations

(Note that additional paper may be used as required to reply to this prompt below; please include all relevant information deemed necessary. Please put the General Officer's name and General Officer's position at the top of each supplemental page and attach them with this form.):

The Medical Coin Series continues with the Rhode Island Issue featuring Solomon Drown available at this Leadership. Coins are available from Secretary General Darryl Addington for \$5 each. It is preferable to let Darryl know of your wants prior to Leadership so he can have them ready when he comes. The last in the series, Connecticut featuring Leverette Hubbard, is scheduled to be available at the Fall 2024 Leadership, completing the 15-coin series. Plans are to have a coin display holder so that those with a complete set may show them in an impressive fashion.

Also, in relation to the above coin series, a book is planned to parallel the 15 coins with a brief history of the contributions of the 15 people featured on the coins.

Past Surgeon General Ernest Sutton will serve as medical liaison for the PA Congress in 2024, including providing a medical sheet for all registrants.

A letter of endorsement has been sent to Past President General C. Bruce Pickette, Chairman of the Nominating Committee, for John Turley, M.D. to be our candidate for Surgeon General for election at the 2024 PA Congress.

Respectively submitted,

David C. Chaffin, M.D., FACR
Surgeon General, 2023-2024

*This report also serves as the report for the Medical Advisory Committee.

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: Edgar S Hoak		
Filing Date: 31 January 2024	SAR District: New England District	
Mailing Address: 31 Swing Drive		
City: Berkley	State: MA	ZIP Code: 02779
Telephone Number: 508.823.3187	E-Mail Address: EdHoak.SAR@comcast.net	
<p>SAR District Meetings that happened since last report—show Dates, Locations and type of meeting (Note that additional paper may be used as required to reply to the following prompts; please include all relevant information deemed necessary in bullet point format. Please put the Vice President General's name and SAR district at the top of each supplemental page and attach them with this form.):</p> <ul style="list-style-type: none"> • Semi-Annual New England District at <i>USS Constitution</i> (Charlestown, MA) 		

<p>SAR Meetings Attended or Planned between last and next reporting period:</p> <ul style="list-style-type: none"> • America's Hometown Parade (Plymouth, MA) • Boston Tea Party (Boston, MA) • MASSAR Board of Managers Meeting (Westwood, MA) • Executive Committee Meetings (Zoom) • SAR Foundation Meetings (Zoom) • Budget and Strategic Planning Committee Meetings (Zoom)
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Type of Society	Point of Contact	Type of Meeting or Event	Date	City / State
1. District	Edgar Hoak	Semi-Annual Meeting	28 Oct 2023	Charlestown, MA
2. MASSAR	CG Cmdr C. Tourtellot	Thanksgiving Parade	18 Nov 2023	Plymouth, MA
3. National	PG John Dodd	Executive Committee	29 Nov 2023	Zoom
4. MASSAR	Pres. Jim Holmes	Board of Managers	9 Dec 2023	Westwood, MA
5. National	Pres. Jim Holmes	Boston Tea Party	15-17 Dec 2023	Boston, MA
6. National	PG John Dodd	Executive Committee	27 Dec 2023	Zoom
7. National	PG John Dodd	Executive Committee	6 Jan 2024	Zoom
8. National	PG John Dodd	Executive Committee	7 Jan 2024	Zoom
9. National	Pres. Lee Popham	SAR Foundation	11 Jan 2024	Zoom
10. MASSAR	Pres. Jim Holmes	Board of Managers	13 Jan 2024	Westwood, MA
11. National	PG. John Dodd	Special Trustee Meeting	13 Jan 2024	Zoom
12. National	PG John Dodd	Executive Committee	24 Jan 2024	Zoom
13. National	Pres. Lee Popham	SAR Foundation	2 Feb 2024	Zoom
14. MASSAR	Pres. Jim Holmes	Annual Meeting	24 Feb 2024	Hopkinton, MA
15. National	PG John Dodd	Spring Leadership	29 Feb - 2 Mar 2024	Louisville, KY
16. NHSSAR	Pres. Andy Akers	BOM Meeting	13 March 2024	Manchester, NH
17. MASSAR	Pres. Jim Holmes	Evacuation Day	17 March 2024	Dorchester, MA
18. District	Ethan Stewart	Semi-Annual Meeting	23 Mar 2024	Windsor, CT
19. National	Pres. Jim Holmes	Patriots Day	15 April 2024	Concord, MA
20. VTSSAR	Pres. Randy Roberts	Annual Meeting	27 April 2024	Arlington VT
21. CTSSAR	Pres. Paul Selnau	Annual Meeting	27 April 2024	Berlin, CT

Type of Society	Point of Contact	Type of Meeting or Event	Date	City / State
22. RISSAR	Pres. Chris Sparks	Annual Meeting	13 April 2024	East Greenwich, RI
23. NHSSAR	Pres. Andy Akers	Annual Meeting	13 April 2024	Manchester, NH
24. MESSAR	Pres. Jeffrey Williams	Annual Meeting	TBD May 2024	TBD
25. MASSAR	Pres. Jim Holmes	Bunker Hill	17 June 2024	Charlestown, MA

Details of meetings/events described above

1. Fall New England District Meeting. The Fall New England District Meeting was held at the historic *USS Constitution* in Charlestown, MA, and was very well attended by all state societies within the district (CT, RI, MA, VT, NH, and MA). The day began very early with a special VIP tour by the Constitution's crew. At the Fall district business meeting, we heard reports of all participating state societies, discussed two major upcoming events (America's Hometown Parade and Boston Tea Party), support of the CTSSAR Congress, and status of the Education Center and Museum. Lunch followed with a lecture of the history and fun facts of the *Constitution* followed by a 250th plaque presentation to the first female commander of the *USS Constitution* (Billy Farrell).
2. America's Hometown Parade is Plymouth, Massachusetts's nationally televised Thanksgiving Parade covering 2-3 miles of parade route past many of Plymouth's historic sites. The Massachusetts Society's Henry Knox Regimental Color Guard participates in this annual parade and invites all New England District member societies. MASSAR's color guard was seen on Boston Channel 5 which was broadcast on Thanksgiving Day. VPG Hoak in uniform led the parade carrying the Betsy Ross flag marching between 2 color guard drummers.
3. Boston Tea Party. The Massachusetts Society co-hosted the 3-day national 250th anniversary of the Boston Tea Party. President General John Dodd, Treasurer General Mike Elston, Historian General Brooks Lyles, National Color Guard Commander Scott Collins, members from all state societies of the New England District, and compatriots from across the country (14 states represented in all).

Day 1: Revolutionary Historic Tavern Tour

Day 2: Numerous symposiums and presentations on the Tea Party

Rolling rally to Griffins Wharf led by MASSAR's Color Guard, President General, General Officers, New England District member state societies, and compatriots across the country. 20,000 people were reported to have participated in the march to Griffins Wharf. The New England District collected donations and purchased 1,000 America 250 pins which were given to participants along the route.

Re-enactment of the destruction of tea

Day 3: Ecumenical Service

Revolutionary Brunch sponsored by MASSAR with participation of all Boston Tea Party Sponsors. VPG Hoak provided greetings on behalf of PG Dodd, inducted new SAR members, and presented Tea Party Medals and Challenge Coins to sponsor presidents.

This was an amazing, once in a lifetime event. SAR was in the news coverage including the *Boston Globe*, *Boston Herald*, Boston Channel 5, Fox Nation, and many other news organizations who documented SAR leading the rolling rally from the Old South Meeting Hall to Griffins Wharf.

4. Executive Committee, SAR Foundation. As National Recording Secretary, I coordinate setup and administration of the Zoom meetings, recordings, and publishing of draft minutes. Refer to those reports for further details.
5. Budget and Strategic Planning Committees. VPG Hoak is a committee member who is an active participant in these committees. Refer to those reports for further details.
6. Massachusetts Society Board of Managers Meetings. VPG Hoak is an active standing member of the Board of Managers as the result of his tenure as State President. VPG regularly provides reports and information from National in addition to giving suggestion and guidance.

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: Joseph Vermaelen		
Filing Date: January 30, 2024	SAR District: North Atlantic	
Mailing Address: P. O. Box 84		
City: Bayport	State: NY	ZIP Code: 11705
Telephone Number: (631) 472-2839	E-Mail Address: JPVermaelen@aol.com	
SAR District Meetings' that happened since last report—show Dates, Locations, and type of meeting (Note that additional paper may be used as required to reply to the following prompts; please include all relevant information deemed necessary in bullet point format. Please put the Vice President General's name and SAR district at the top of each supplemental page and attach them with this form.):		

SAR Meetings Attended or Planned between last and next reporting period				
Type of Society	Point of Contact	Type of Meeting or Event	Date	City / State
1. Empire State	D Powell	Zoom Planning 250th	Oct 18, 2023	New York
2. ADEAW	K. Powers Vermaelen	Conference	Oct 28, 2023	Hartford/CT
3. Empire State	D. Powell	BOM Meeting	Nov 19, 2023	New York
4. Chapter West/Put	K. Stevens	Chapter Meeting	Dec 2, 2023	New York
5. New Jersey State	R. Meyer	Battlefield Tour	Dec 8, 2024	New Jersey
6. SoGAR	T. Badamo	Christmas Meeting	Dec 27, 2023	New York
7.				
8.				
9.				
10.				

- Details of meetings/events described above**
1. **09/29/2023 - Wrote letter to Senator Charles Schumer about elevating the William Floyd Estate to a National Park for the 250th Anniversary.**
 2. **Zoom – 250th Strategic Planning Meeting for the Empire State Society**
 3. **Attended and brought greetings to ADEAW at Conference in Hartford, CT**
 4. **Attended Empire State Board of Managers Meeting**
 5. **Attended Westchester/Putman Chapter meeting, Empire State Society**
 6. **Attended Battlefield Tour of Trenton & Princeton hosted by the New Jersey State Society with Secretary General Darryl Addington.**
 7. **Attended and brought greetings to the Society of the Grand Army of the Republic at their holiday party.**

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: James F. Engler, Sr.		
Filing Date: 02 February 2024	SAR District: Mid-Atlantic	
Mailing Address: 2038 Red River Rd.		
City: Sykesville	State: MD	ZIP Code: 21784
Telephone Number: 443.280.7406	E-Mail Address: j.f.engler.1@gmail.com	

SAR Meetings Attended or Planned between last and next reporting period

Type of Society	Point of Contact	Type of Meeting or Event	Date	City / State
NSSAR		Fall Leadership 2023	22-23 Sep 2023	Louisville, KY
Central District	S. Hinson	District Zoom	27 Sep 2023	
Intermountain District	E. Rail	District Zoom	19 Oct 2023	ONLINE
MD SAR	C. Smithson	Semi-Annual Meeting	21 Oct 2023	Chestertown, MD
PA SAR	E. Troutman	Semi-Annual Meeting	03-04 Nov 2023	Pittsburgh, PA
North Central District	C. Moberg	District Zoom	21 Nov 2023	ONLINE
DC SAR	W. Ritchie	Holiday Event	05 Dec 2023	Washington, DC
John Paul Jones, MD SAR	M. Deeds	240 th Commemoration, G. Washington Resignation as Commander-In-Chief, Continental Army	23 Dec 2023	Annapolis, MD
NJ SAR	R. Williams	247 th Commemoration, Battle of Princeton	07 Jan 2024	Princeton, NJ
MD SAR	C. Smithson	January Board of Managers Meeting	13 Jan 2024	Bowie, MD
NSSAR		Special Trustees Meeting	13 Jan 2024	ONLINE
Mid-Atlantic District	J. Engler	District Zoom	29 Jan 2024	ONLINE
VA SAR	E. Coggins	Annual Meeting	09-10 Feb 2024	Richmond, VA
DC SAR	W. Ritchie	GW Luncheon	17 Feb 2024	Arlington, VA
DE SAR	D. Schrader	GW Luncheon	24 Feb 2024	Dover, DE
NSSAR		Spring Leadership 2024	01-02 Mar 2024	Louisville, KY
North Central District	C. Moberg	District Zoom	05 Mar 2024	ONLINE
DC SAR	W. Ritchie	T. Jefferson Commemoration	13 Apr 2024	Washington, DC
DC SAR	W. Ritchie	Annual Meeting	21 Apr 2024	Arlington, VA
DE SAR	D. Schrader	Annual Meeting	27 Apr 2024	Dover, DE
PA SAR	E. Troutman	Annual Meeting	04 May 2024	Morgantown, PA
NSSAR		National Congress	10-16 Jul 2024	Lancaster, PA

Details of meetings/events described above:

I presented introductions to the Americanism scoresheet at Zoom meetings of the Central and Intermountain Districts, and Illinois SAR. I am scheduled to present as well to North Central District on the topic "You Can't Change What You Don't Measure", which expands the introduction to the Americanism scoresheet to include how visualization of SAR data can help a chapter and state society.

The speaker at the DC SAR Holiday Event spoke of the over 6,000 patriots of color including those of African ancestry as well as of the First Nations. We should make efforts to make certain that their stories are told in biographies in the SAR Patriot Research System.

I've held one quarterly Zoom meeting so far with my district, reviewing topics of 250 projects, inactive member lists, encouraging submissions to the USS Stark and Americanism contests, efforts on increasing new members in the last quarter, and upcoming state schedules.

I attended the commemoration of the 240th anniversary of Washington's resignation as Commander-in-Chief, Continental Army. The event is to become an annual event and is looking for compatriots from each state that was present in the chamber in Annapolis that day to have reenactors playing the related roles. They eventually hope to turn this into a National Event in time for the 250th.

The battle reenactment at Princeton is the first I've ever seen, and I found it impressive. Even more so, there were present representatives of modern US and UK military units that can trace their regimental family tree to units that fought at Princeton in 1777.

Spring will be busy with all states holding their annual meetings. There looks to be one schedule conflict between Maryland and Delaware.

Respectfully submitted,

James F. Engler, Sr.
VPG Mid-Atlantic

Sons of the American Revolution

Vice President General's Report Form

Vice President General's Name: Steven A. Gaines		
Mailing Address: 115 Marseille Drive		
City: Hendersonville	State: TN	ZIP Code: 37075
Telephone Number: (615) 585-3241	E-Mail Address: SteveTNSSAR@gmail.com	
Filing Date: 5 Jan 2024	SAR District: SOUTHERN	
SAR District Meetings' Dates and Locations (Note that additional paper may be used as required to reply to the following prompts; please include all relevant information deemed necessary. Please put the Vice President General's name and SAR district at the top of each supplemental page and attach them with this form.):		

Number of SAR District Meetings Attended: 3 in 2023; 2024 Meetings not scheduled until February-April 2024.

State-level Societies	President	Chapters	Annual Meeting	City
1. Tennessee	Dr. David Chaffin	23	15-16 March 2024	Cleveland
2. Alabama	Jim Griffith	15	23-24 February 2024	Hoover
3. Mississippi	Rev. Tommy Thompson	16	08-09 March 2024	Biloxi
4. Louisiana	Randall Domingue	11	12-13 April 2024	Lafayette

Report and Recommendations

My primary goal remains the planning and fund-raising efforts for our hosting of the 2027 National Congress, begun last year. The Marriott Hotel in New Orleans (Canal Street) has been contracted, and fund-raising efforts are underway. Several pins and medal sets are available for purchase as well as other items that are being raffled. Quarterly Zoom meetings are being held with our Congress Committee working with Paul Callanan and PG Davis Wright.

My other goal is youth education efforts in all four states. Working with other SAR members as well as the state Color Guards, we are encouraging more involvement with youth educational activities such as school trunk visits, field trip training - predominantly at historic sites throughout the states - and soliciting entrants for the various SAR youth contests.

- 1) The Southern District Congress Committee will have an information and fund-raising table at all Congress and Leadership meetings through July 2027, as well as at various state meetings and chapter meetings.
- 2) 2024 state meetings schedule is shown above. Registration packets for each will be found on the respective State websites as well as the Southern District web page. The 2024 Southern District Annual Meeting is scheduled in conjunction with the 2024 Tennessee State Meeting, March 16, 2024, to be held in Cleveland, Tennessee. I am scheduled to attend all four of our 2024 State Meetings.

- 3) Scheduled activities such as Patriot Grave Markings are not going on at present but will resume at a quick pace in the Spring as the weather improves. Most, if not all, Chapters in the four states took active roles in Wreaths Across America, and many of our Chapters were involved in or held America 250 events in remembrance of the Boston Tea Party in December.
- 4) Other notable activities this Fall included Alabama volunteers working with The American Village in Montevallo, AL, and providing excellent online video resources. Louisiana hosted two dates remembering the Siege of Baton Rouge as well as the Lake Charles Avenue of Flags, and Mississippi is working with several other organizations planning a bicentennial celebration of Lafayette's Tour. Tennessee continues our annual National event, the Gathering at Sycamore Shoals.
- 5) Planning is underway for a number of upcoming public education events in a variety of locations. School Day activities are being planned here in Sumner and Dickson counties in Tennessee, and our other State Presidents advise that similar events will be taking place as the new year progresses. These activities include demonstrations and discussions as well as hands-on activities for various aged youth.
- 6) Took part in Zoom virtual meetings of several other Districts as I was not able to physically attend due to scheduling conflicts.
- 7) Each state has recently completed their annual dues collection process; however, the final tally of results has not been received as the required reconciliation reports are being completed as this is being reported out. Hopefully the renewal/retention rates will show some improvement over the results of the past several years. Data sets for 5-year retention were provided to each state; however, as previously reported, the usage by each state varied.

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: L. Stephen Hinson		
Filing Date: February 2, 2024	SAR District Central District	
Mailing Address: 5863 Beech Street		
City: Andover	State: OH	ZIP Code: 44003
Telephone Number: 440-645-7322	E-Mail Address: stevhin@earthlink.net	
SAR District Meetings' that happened since last report—show Dates, Locations and type of meeting (Note that additional paper may be used as required to reply to the following prompts; please include all relevant information deemed necessary in bullet point format. Please put the Vice President General's name and SAR district at the top of each supplemental page and attach them with this form.):		

SAR Meetings Attended or Planned between last and next reporting period				
Type of Society	Point of Contact	Type of Meeting or Event	Date	City / State
1.National Society SAR	PG J Dodd	VPG / Trustee Meeting	22-23 Sep 2023	Louisville, KY
2.Pt. Pleasant Chapter SAR	E Cromley	Battle Days Weekend	07-08 Oct 2023	Pt Pleasant, WV
3.OH Society SAR	D Miller	State Society Meeting	14 Oct 2023	Bellville, OH
4.Fobes-Harper C.A.R.	V Hinson	Grave Marking	15 Oct 2023	Uniontown, OH
5.Central District SAR	S Hinson	District Annual Meeting	20-21 Oct 2023	Milton, OH
6.Great Lakes District SAR	D VanHoof	District Annual Meeting	27-28 Oct 2023	Bay City, MI
7.KY Society SAR	T Brown	State Society Meeting	04 Nov 2023	Elizabethtown, KY
8.David Hudson DAR Chap	K Kashary	Chapter Meeting	10 Nov 2023	Hudson, OH
9.Northeastern OH Chapter SAR	G Georgeff	Chapter Meeting	11 Nov 2023	Saybrook, OH
10.Akron DAR/Lafayette SAR Chaps.	M Schlengel	Chapter Meetings	18 Nov 2023	Akron, OH
11.Marietta DAR Chapter	P Ullman	Chapter Meeting	02 Dec 2023	Marietta, OH
12.Marietta & Capt James Neal SARs	D Pettit	Chapter Meeting	03 Dec 2023	Parkersburg, WV
13.IN Society SAR	J Vink	House of Delegates	04 Dec 2023	VTC / Zoom
14.Cincinnati Chapter SAR	G Stewart	Chapter Meeting	08 Dec 2023	Cincinnati, OH
15.Northeastern OH Chapter SAR	G Georgeff	Wreath Across America	16 Dec 2023	N. Kingsville, OH
16.Mahoning Valley Chapter SAR	J Gurrier	Chapter Meeting	31 Dec 2023	Niles, OH
17.OH Society SAR	D Miller	State Society Meeting	10 Feb 2024	Marietta, OH
18.Northeastern OH Chapter SAR	G Georgeff	Annual Meeting	16 Feb 2024	Austinburg, OH

Details of meetings/events described above

1. Attended VPG meeting and Trustee meeting at Fall Leadership.
2. Attended Battle Days at Point Pleasant. On Saturday, as VPG Central District, served as Colonial Governor in parade and Colonial Governor's Reception and Ball. Placed Central District wreath at memorial service on Sunday.
3. Attended OH Society state meeting and brought greetings from Central District.
4. Attended Simon Fobes – Elizabeth Harper C.A.R. grave marking in Uniontown, OH. Placed Central District wreath.
5. Hosted Central District annual meeting in Milford, OH. Hosted PG Dodd at dinner Friday evening. Presided over Central District meeting Saturday morning. Placed Central District wreath at grave marking held Saturday afternoon and hosted formal dinner Saturday evening.

L Stephen Hinson VPG

Central District NSSAR

February 2, 2023

6. Attended Great Lakes District meeting in Bay City, MI. Brought greetings from Central District.
7. Attended KY Society Board of Delegates meeting Saturday morning and state meeting Saturday afternoon. Brought greetings from Central District.
8. Attended David Hudson DAR Chapter meeting. Brought greetings from Central District and did presentation on Flags of the Revolutionary War Period.
9. Attended Northeastern OH Chapter meeting and brought greetings from the Central District.
10. Attended joint Anniversary Luncheon of the Akron DAR and Lafayette Chapter SAR. Both celebrated their 100th anniversaries. Brought congratulations from the Central District SAR.
11. Attended 120th Anniversary Luncheon of the Marietta DAR Chapter and brought congratulations from the Central District SAR.
12. Attended Marietta, OH, Chapter and Parkersburg, WV, joint Holiday Luncheon and brought greetings from Central District. Inducted new chapter officers.
13. Attended IN Society VTC House of Delegates meeting.
14. Attended Cincinnati Chapter Holiday Gala and Awards Banquet. Brought greetings from Central District. Inducted new chapter officers.
15. Participated in Wreaths Across America, hosted by the Stanley-Redmond-Harper DAR and Northeastern OH Chapter SAR. Brought greetings from Central District and read PG Dodd's Proclamation.
16. Attended Mahoning Valley Chapter SAR's holiday luncheon and awards ceremony hosted at the President McKinley Childhood Museum in Niles, OH. Brought greetings from Central District. Inducted new member.
17. Attended OH Society meeting in Marietta, OH. Brought greetings from Central District.
18. Attended Northeastern OH Chapter SAR annual meeting and inducted new chapter officers.

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: DAVID W. VAN HOOF		
3860 KISKADEE DR.		
EAST LANSING	MICHIGAN	48823
(517) 499-7480	david.w.vanhoof@gmail.com	
13 JAN 2024	GREAT LAKES DISTRICT	

Number of SAR District Meetings Attended: 2 to date.				
State-level Societies	President	Chapters	Annual Meeting	City
1. Michigan Society	Mickey McGuire		April 6, 2024	Lansing, MI
2. Illinois Society	Robert Ruedin		May 3, 2024	Springfield, IL
3. Wisconsin Society	Robert Haglund		April 27, 2024	Madison, WI
4.				
5.				
6.				
7.				
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9.				
10.				

Report and Recommendations:

REPORT:

SEPT 24 (SUNDAY) – Huron River Valley Patriot Grave Dedication of Patriots Samuel Waldron & Archibald Armstrong; Oakwood Cemetery, Saline, MI; intends to lay a wreath.

SEPT 30 (SATURDAY) – GLD VPG spoke at MIDAR/MISSAR joint genealogy Zoom workshop.

OCT 12 (THURSDAY) – GLD VPG visited Ft. St. Joseph archeology site and met with Niles historian concerning local efforts, to commemorate Raid on Ft. St Joseph (Michigan's only American Revolution battlefield).

OCT 14 (SATURDAY) – GLD VPG attended/spoke at African American Genealogy workshop in Jackson County Genealogy

OCT 19 (THURSDAY) – GLD VPG attended Pvt Ephraim Wheaton Chapter Annual Meeting. Made chapter president.

OCT 21-22 (FRIDAY & SATURDAY) – GLD VPG attended the Central District Annual Meeting and memorial; intends to lay a wreath.

OCT 24 (TUESDAY) – GLD VPG attended VPG Strat Plan Zoom meeting and Americanism Comm Zoom meeting.

OCT 26 (THURSDAY) – GLD VPG conducted Zoom meeting w/ MISSAR State President and MI DAR State Regent about making Raid on Fort St. Joseph Michigan's 250th signature event.

OCT 27 (FRIDAY-noon) – GLD VPG attended Perry-McFarlan Cemetery plaque dedication, Atlas, MI, sponsored by Paul Emory Chapter & MISSAR, honoring Pvt Nathan Burpee; wreath laid.

OCT 27 (FRIDAY- evening) – GLD Gala at Doubletree Hilton, One Wenona Park Place, Bay City, MI 48708; (989) 460-1703.

NOV 1 (WEDS-noon) – GLD VPG spoke at DAR Sarah Prudden Chapter, Jackson, MI.

NOV 11 (SATURDAY) – GLD VPG dedicated Cemetery Plaque honoring patriot Joseph Darling at Woodlawn Cemetery, Jackson, MI, and attend flagpole dedication at fallen soldier memorial at St. Joseph Cemetery. Will lay a wreath at both events.

NOV 29 (WEDS) – GLD VPG conducted Zoom meeting with Southwestern MI DAR chapter to coordinate a joint wreath laying event in Niles, MI, to commemorate Feb 12, 1780, Raid on Ft St. Joseph.

DEC 5 (TUES) – GLD VPG conducted a wreath laying ceremony at Le Petit Fort at Indiana Dunes State Park to commemorate the death of French-Canadian voyageur and Michigan patriot Captain Jean-Baptiste Hamlin.

DEC 16 (SAT) – GLD VPG participated in “Wreaths Across America” placing 57 wreaths on veteran graves at St. Johns Cemetery, in Jackson, MI. Also placed a wreath on the patriot grave of Joseph Darling at Woodland Cemetery in Jackson with members of the DAR Sarah Prudden Chapter.

DEC 28 (THURS) – GLD VPG attended NSSAR ExCom Mtg. Appointed to the NSSAR Strategic Planning Committee.

JAN 3 (WEDS) – GLD VPG conducted Zoom meeting with author Linda Haas about publishing a booklet regarding patriots buried in Jackson County, MI.

JAN 6 (SAT) – GLD VPG attended MISSAR Col Westnedge Chapter meeting, emphasizing the recognition of the raids conducted on Fort St. Joseph and upcoming wreath laying, located in the chapter’s district.

JAN 6 (SAT) – GLD VPG participated in Veterans / Stark Report Zoom meeting.

JAN 9 (TUES) – GLD VPG met with Congressman Bergman explaining the NSSAR mission, reminded him of upcoming 250th celebration and to sign the back of MISSAR copy of the Declaration of Independence.

JAN 10 (WEDS) – GLD VPG met with US Congressman James explaining the NSSAR mission, reminded him of upcoming 250th celebration and to sign the back of MISSAR copy of the Declaration of Independence; met with US Congressman Thenedar explaining the NSSAR mission, reminded him of upcoming 250th celebration and to sign the back of MISSAR copy of the Declaration of Independence; met with US Senator Peters explaining the NSSAR mission, reminded him of upcoming 250th celebration and to sign the back of MISSAR copy of the Declaration of Independence.

WEEK OF JAN 15 – GLD VPG met with MI Legislator Kathleen Schmaltz regarding state legislation to protect American veterans’ graves in Michigan.

JAN 24 – GLD VPG attended MISSAR Strat Plan Zoom meeting.

JAN 31 (WEDS) – GLD VPG submitted MISSAR completed USS Stark Report; discussed with ILSSAR and WISSAR State Presidents concerning submitting USS Stark / Americanism Reports in timely manner.

FEB 3 (SAT) – GLD VPG attended MISSAR BOM Zoom meeting.

FEB 15 (THURS) – GLD VPG conducted Pvt Ephraim Wheaton Chapter Meeting.

FEB 17 (SAT) – GLD VPG attended and placed a wreath at Fort St. Joseph, in Niles, MI, commemorating the Feb 12, 1781, raid.

APR 6 (SAT) – GLD VPG will attend the MISSAR BOM/Annual Meeting in Lansing, MI.

APR 26 (FRI) – GLD VPG to attend Pvt Ephraim Wheaton Chapter Liberty Tree dedication on Michigan State Capitol Grounds.

APR 27 (SAT) – GLD VPG to attend WISSAR BOM / Annual Meeting in Madison, WI.

MAY 3 (SAT) – GLD VPG to attend ILSSAR BOM / Annual Meeting in Springfield, IL.

MAY 27 (MON) – GLD VPG to participate in Memorial Day events near Saugatuck/Douglas and Holland, MI area.

JUN 8 (SAT) – GLD VPG to attend MISSAR BOM in Owosso, MI, and cemetery plaque dedication for patriot Jacob Doty.

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: Christopher Willard Moberg		
Filing Date: 01/29/2024	SAR District: North Central District	
Mailing Address: 5514 26 th Avenue NW		
City: Rochester	State: MN	ZIP Code: 55901-4194
Telephone Number: (507) 271-0674	E-Mail Address: moberg.chris@gmail.com	
SAR District Meetings' that happened since last report—show Dates, Locations, and type of meeting (Note that additional paper may be used as required to reply to the following prompts; please include all relevant information deemed necessary in bullet point format. Please put the Vice President General's name and SAR district at the top of each supplemental page and attach them with this form.):		

SAR Meetings Attended or Planned between last and next reporting period:				
Type of Society	Point of Contact	Type of Meeting or Event	Date	City / State
1. Iowa SAR	Chris Moberg	Award ceremony	09/27/2023	Des Moines, IA
2. Iowa SAR	Chris Moberg	State meeting	09/28/2023	Zoom
3. N. Central District	Chris Moberg	District meeting	10/03/2023	Zoom
4. Nebraska SAR	Chris Moberg	Comp. grave marking	10/22/2023	Omaha, NE
5. Iowa SAR	Chris Moberg	State meeting	10/26/2023	Zoom
6. Minnesota SAR	Jim Hagen	State ExCom mtg	11/18/2023	Hastings, MN
7. N. Central District	Chris Moberg	District meeting	11/21/2023	Zoom
8. Iowa SAR	Chris Moberg	State meeting	11/30/2023	Zoom
9. Minnesota SAR	Jim Hagen	State ExCom mtg	12/08/2023	Zoom
10. N. Central District	Chris Moberg	District meeting	12/14/2023	Zoom
11. Iowa SAR	Chris Moberg	State meeting	12/28/2023	Zoom
12. N. Central District	Chris Moberg	District meeting	01/04/2024	Zoom
13. Minnesota SAR	Jim Hagen	State meeting	01/20/2024	Minneapolis, MN
14. Iowa SAR	Chris Moberg	State meeting	01/25/2024	Zoom
15. N. Central District	Chris Moberg	District meeting	02/15/2024	Zoom
16. Minnesota SAR	Jim Hagen	State meeting	02/17/2024	Minneapolis, MN
17. Iowa SAR	Chris Moberg	State meeting	02/22/2024	Zoom

Details of meetings/events described above:

09/27/2023 - Presented awards at Iowa SAR meeting in Des Moines, IA
 09/28, 10/26, 11/30, 12/28, 01/25/2024, 02/22 - Hosted Iowa SAR Zoom meetings
 10/03/2023 - District Zoom: "The History of the SAR" with National Librarian General Dr. Fred Olive
 10/22/2023 - Compatriot grave marking for 2nd Nebraska SAR President Thomas Creigh in Omaha, NE
 11/18, 12/08/2023 - Minnesota Executive Committee meetings in Hastings, MN, and on Zoom
 11/21/2023 - District Zoom: "SAR Museum Artifacts Showcase" with SAR Museum Curator Zac Distel
 12/14/2023 - District Zoom: "1774 – Threshold of Revolution" with Mark Byars
 01/04/2024 - District Zoom: "Impacts of the Enlightenment on the American Revolution" with Dr. Jim Sly
 01/20/2024 - Minnesota SAR business meeting in Minneapolis, MN
 02/15/2024 - District Zoom: "The Gaspee Affair" with Jay DeLoach, Rear Admiral, USN (Ret.)
 02/17/2024 - Minnesota SAR state meeting in Minneapolis, MN

Actions:

MN SAR recording secretary, Color Guard, Living History team, and Americanism chairman
 IA SAR state president, newsletter editor, webmaster, and youth contest judge
 Dakota SAR state vice president
 IA War of 1812 state president and webmaster

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: Bobbie Hulse		
508 E Kansas		
McPherson	KS	67460
620-755-3170	E-Mail Address: bobbiesar2@att.net	
Filing Date: Jan. 10, 2024	SAR District: South Central District	
<p>SAR District Meetings' Dates and Locations (Note that additional paper may be used as required to reply to the following prompts; please include all relevant information deemed necessary. Please put the Vice President General's name and SAR district at the top of each supplemental page and attach them with this form.): SAR District Meetings' Dates and Locations (Note that additional paper may be used as required to reply to the following prompts; please include all relevant information deemed necessary. Please put the Vice President General's name and SAR district at the top of each supplemental page and attach them with this form.):</p> <p>The South Central District met on Aug 25-26. Excellent attendance from all five states, and the PG was in attendance as well as a majority of the candidates. Rep. Hoehisel is now a member, and we continue to work on the membership of Mayor Whipple, who were both speakers at the conference. Installation of Andrew Lowe by the PG was nice, and Compatriot Lowe is now a Senior Leader of the Joseph Plumb Martin Society CAR. Kansas Elementary Teacher of the year, who was a very inspirational speaker, was later named teacher of the year in her district and is now on a short list for Kansas Teacher of the year. Our other speaker, Zoe McHenry, is serving in Israel for the Bridges for Peace in Israel, going there the week after the conference and continuing her mission in spite of the war.</p> <p>Attended Fall Leadership in Louisville, KY, Sept 17-21, 2023. We began our trip to visit other districts by staying the night with Russ and Laura DeVenney. Russ is a great mentor for me going on the VPG venture. I attended the Central District meeting in Milford, Ohio, and participated in the grave markings of 6 patriots in Goshen, OH, as a part of that meeting and then went to KY for a week searching for the grave of my patriot grandfather. There we met some great DAR and cemetery restoration people in Flemingsburg, and I wrote a letter to the editor of the paper, which was printed, and the response from the letter has added several volunteers to help with cemetery restoration of the more than 60 cemeteries in the county. The SAR could easily develop a chapter in Flemingsburg as I met several qualified men while there that could be members.</p> <p>The following weekend we were in Bay City, MI, to attend the Great Lakes District meeting and also for the grave marking of Nathan Burpee in Grand Blanc, MI. These two meetings gave me a chance to get to know many of the candidates for National Office better than when I was hosting the SCD meeting as I was too busy to have time to converse with people in depth. It was also great to be able to participate in grave markings as we do not have many at all in Kansas.</p> <p>We returned to our own SCD and traveled to Van Buren, AR, for patriot grave markings of one patriot in Van Buren and then later on to Cove City, AR, to mark the graves of the Mobley brothers. Past VPG McLemore did the ground work for the Arkansas event and we had CG from all five states in the SCD at the event.</p> <p>I spent two days at the Kansas State Fair manning the 250th Anniversary booth that was provided for us by the State of Kansas and manned by DAR and SAR compatriots throughout the fair. I have since had a number of men wishing to become SAR members and have several applications in progress even though that was not the main objective wearing the uniform and giving out my card to those who asked; it is paying dividends for the SAR.</p>		

Marched in the Veterans Day parade in Manhattan, KS, on Nov. 10th, and the Parade of Lights in Hutchinson Dec 2nd.

Led a Boston Tea Party reenactment and remembrance in Lakeside Park, McPherson, KS, on December 16th.

Participated in 12 Color Guard events Sept-Dec.

DAR Compatriot Grave marking in uniform and presented colors Oct 9.

Worked with DAR in Flemingsburg, KY, Oct 23; Kansas State Fair, Sep 14-15, Hutchinson KS; Hutchinson Parade, KS, Dec 2; McPherson Tea Party, Dec 16

National Committee meetings attended by Zoom:

Genealogy: Oct 2, Oct 6, Oct 15, Nov 6, Nov 13

Americanism: Oct 24

Education: Nov 16

Submitted my 100th first line sponsored application 29 Sept and working on 6 applications at this time.

We have a SCD Zoom meeting scheduled for January 18th, and we will be attending the George Washington Birthday luncheon on Jan 17th.

I have two classroom presentations set up in January for the poster contest and possibly all contests as one is a new homeschool group that I have not been in front of before.

Number of SAR District Meetings Attended: South Central Zoom Nov. 12, Central District in person Oct 20-21, Great Lakes District in person Oct 27-28, North central District by Zoom Nov 21

State-level Societies	President	Chapters	Annual Meeting	City
1.Michigan			Board of Managers	Bay City
2.Arkansas	Hogue		BOG / Dec	Zoom
3.Kansas	Roberts	Sons of the Plains	Monthly Oct	Hutchinson
4.Kansas	Black	Bennington	Monthly Nov	Abilene
5.Kansas	Roberts	Sons of the Plains	Monthly Nov	Hutchinson
6.Kansas	Roberts	Sons of the Plains	Monthly Dec	McPherson
7.Kansas	Svaty	Prairie Minutemen	Monthly Dec	Ellsworth
8.Kansas	Roberts	Sons of the Plains	Monthly Sep	Hutchinson
9.				
10.				

Report and Recommendations: Recommend that all of us as VPGs continue to communicate to our State Presidents that we all need to get our Stark and Americanism reports handed in, for not only the state but chapters, to the state chairman. I feel that this really is helpful to the group to see where assistance is needed and mentoring as well. We need to foster turnover of chapter and even state offices with exception of registrar, and there we need to have a person who is making ready to step in when the time comes with the background necessary for a smooth transition. We are many times unprepared for the unexpected and getting others involved is good for retention.

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: Dr William Baran		
Mailing Address: 1327 E Briarwood Ter		
City: Phoenix	State: AZ	ZIP Code: 85048
Telephone Number:480-487-9033	E-Mail Address: WBaran@cox.net	
Filing Date: Jan 14, 2024	SAR District: Rocky Mountain District	
SAR District Meetings' Dates and Locations (Note that additional paper may be used as required to reply to the following prompts; please include all relevant information deemed necessary. Please put the Vice President General's name and SAR district at the top of each supplemental page and attach them with this form.):		
Oct 3, 2023 - North Central District Zoom meeting. Attendees: 32; Neb, Mn, IA, S&N Dakota, International District VPG, Intermountain District VPG.		
Oct 19 - Intermountain District leadership meeting. Talks: Derek Brown, Membership; Jim Engler Americanism, an overview.		
Nov 21 - North Central District Zoom meeting. Attendees: 29; Zac Distel, Education items.		
Dec 6 - Barry M Goldwater Chapter Christmas Party. Awarded first two District Henry Knox Achievement Medals to George White and David Swanson for service to the District website and historical documents.		
Dec 7 - Phoenix Chapter Christmas Party; greetings.		
Dec 9 - DAR Tea Party with skit and color guard from SAR		
Dec 16 - Saguaro Chapter Christmas and Installation of Officers as VPG.		
Jan 13 th Barry M Goldwater Chapter. Presentation, "Frontier Rangers", and Installation of Officers		

Number of SAR District Meetings Attended:				
State-level Societies	President	Chapters	Annual Meeting	City
1.New Mexico BOM	Roger Newell	3	2/03/2024	Zoom
2.Arizona Gen Event	Paul Wescott	4	10/05/2023	Zoom
3.Arizona BOM	Robert Hoover	5	11/18/2023	Tempe, AZ
4.				
5.				
6.				
7.				
8.				
9.				
10.				

Report and Recommendations

1. 9/15 - Drafted and sent letter to be used in contacting delinquent members on distributed list.
2. 9/16 - Brought greetings to Agua Fria DAR Constitution Day Program and presented my patriot in uniform.
3. 11/09 - Fort Loudoun Allegheny Uprising 1763-64. PA
4. 11/15 - DAR Gila Butte Chapter "Rifle Presentation"

Future Plans: Approved PG visit to Colorado Annual meeting and special 250th meeting with state personnel.

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: Ellis Charles Rail		
Filing Date: 1 February 2024	SAR District: Intermountain	
Mailing Address: 908 Larch Drive		
City: Rexburg	State: ID	ZIP Code: 83440
Telephone Number: (909) 238-1787	E-Mail Address: Ecrail42@gmail.com	

SAR Meetings Attended or Planned between last and next reporting period

Type of Society	Point of Contact	Type of Meeting or Event	Date	City / State
State – Montana	President Don Reed	Labor Day Parade	Sep 4, 2023	Dillon/MT
Chapter – Teton	President Ellis Rail	Board of Managers	Sep 14, 2023	Zoom
Chapter - Teton	President Ellis Rail	Public Constitution Day Event w/DAR	Sep 17, 2023	Idaho Falls, ID
National	PG John Dodd	Fall Leadership	Sep 21-24, 2023	Louisville, KY
National	VPG Council Chair Edgar Hoak	VPG Council	Sep 22, 2023	Louisville, KY
National	PG John Dodd	Trustee Mtg	Sep 23, 2023	Louisville, KY
Chapter -Teton	President Ellis Rail	Membership	Sep 28, 2023	Idaho Falls, ID
District – Intermountain	VPG Ellis Rail	Leadership	Oct 19, 2023	Zoom
District – North Central	VPG Chris Moberg	Membership	Oct 24, 2023	Zoom
National	PG John Dodd	Special Trustee Mtg	Jan 13, 2024	Zoom
State - Idaho	President Ron Kern	BOM/GWB Planning	Jan 23, 2024	Idaho Falls, ID
Chapter – Teton	President Ellis Rail	Membership	Jan 25, 2024	Idaho Falls, ID
State – Idaho	President Ron Kern	Membership	Feb 17, 2024	Boise, ID
Chapter – Teton	President Ellis Rail	Membership	Feb 22, 2024	Idaho Falls, ID

Details of meetings/events described above

4 Sep 2023 - I participated in period clothing on one of two floats entered in the Labor Day Parade by the Montana Society. After parade answered questions from members of the public about SAR.

14 Sep 2023 – Teton Chapter Board of Managers meeting to work on updating bylaws.

17 Sep 2023 – Joined with Old Fort Hall Chapter DAR, Idaho Falls Mayor Rebecca Casper, and Idaho State Legislator District 32, Wendy Horman, at the Museum of Idaho for a Constitution Day Ceremony that included among other things, a Constitution Day Proclamation read by the Mayor, an address by the State Legislator, a bell ringing ceremony involving the Legislator, the Mayor, myself in my dual capacity as Vice President General Intermountain District/President Teton Chapter SAR, Idaho Alternate National Trustee James Russell McClain, the Old Fort Hall Chapter DAR Regent, Jana Vosika, other DAR officers and members, and a signing of a replica copy of the Declaration of Independence by the Mayor and State Legislator as part of the buildup to the America 250. The event had press coverage from the Idaho Falls *Post Register* that included photographs and a comprehensive article.

21-24 Sep 2023 – Participated in Fall Leadership including the Trustee meeting and the VPG Council. Visited HQ Staff to take care of business with Genealogy Staff. Attended recognition events, officer training, banquets, and participated with SARpremes.

28 Sep 2023 – Presided at Teton Chapter Membership meeting as Chapter President, and reported as VPG Intermountain District on proceedings of Fall Leadership.

19 Oct 2023 – I held an Intermountain District Leadership meeting for former VPGs, National Trustees, Alternate National Trustees, and State Society Presidents from the Intermountain District. Other district VPGs were invited. Key speakers were NSSAR Membership Committee Chair Derek Brown, who addressed membership issues, and NSSAR Americanism Committee Chair James Engler, who provided Event Based Americanism Score Sheet orientation and training.

24 Oct 2023 – At the invitation of North Central District VPG 2023-2024 Chris Moberg, I joined with other District VPGs in the North Central District Zoom meeting.

13 Jan 2024 – Attended Special Trustee meeting via Zoom to vote on proceeding with the construction of the SAR National Museum and Library.

23 Jan 2024 – Attended Idaho State Society SAR Board of Managers meeting. The purpose of the meeting was to review and finalize plans for the annual George Washington Banquet being held on February 17, 2024.

25 Jan 2024 - Presided at Teton Chapter Membership meeting as Chapter President. Principal Speaker Dr. Kevin David Cooper, PhD from Brigham Young University-Idaho and a Major in the United States Army Reserve spoke on what we as citizens can do to honor our SAR pledge to protect the Constitution of the United States from every foe.

17 Feb 2024 – I will be attending the Idaho State Society George Washington Banquet and will have the opportunity to speak and present some awards but am not the principal speaker. Attendees at the banquet include, in addition to members of the Idaho State Society SAR, the State Regent of the Idaho State Society DAR and a number of DAR Chapter Regents.

RAIL – VPG INTERMOUNTAIN DISTRICT

17 Feb 2024 – I have been invited but will not be able to attend the Utah Society SAR George Washington Banquet because of the conflict with Idaho State Society's George Washington Banquet on the same date.

21 Feb 2024 - I have been invited but will not be able to attend the Liberty Tree Chapter of the Montana Society SAR George Washington Banquet because of the conflict with the Teton Chapter SAR of the Idaho State Society Chapter Meeting on 22 February.

22 Feb 2024 – I will preside at the chapter meeting of the Teton Chapter SAR

Other notes: I maintain regular telephone contact and email contact with all State Society Presidents, National Trustees, Alternate National Trustees, and other officers within the Intermountain District to keep abreast of, and assist with, their concerns.

The societies keep me informed of many events they participate in with the public as speakers or supporters in support of the patriotic, educational, and historic purpose of the NSSAR.

The Utah Society has a member on the Utah America 250 Commission.

The president of the Montana Society attempted to join the Montana America 250 Commission but they wanted either DAR or SAR, not both. They opted for DAR.

I am actively working to provide assistance, training, and orientation to the Montana Society's nominee (it is Montana's turn in the rotation) for VPG 2024-2025 Intermountain District NSSAR, Compatriot John Rice.

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: ROBERT P. "ROB" MOORE		
Mailing Address: 975 Valley View Circle		
City: Palm Harbor	State: FL	ZIP Code: 34684
Telephone Number: 808-223-9991	E-Mail Address: robmoore@hula.net	
Filing Date: January 30, 2024	SAR District: Western District (WD)	
<p>A Western District Meeting was held on Nov 4, 2023, aboard the RMS Queen Mary in Long Beach, California.</p> <ul style="list-style-type: none"> • VPG Moore remarked that he enjoyed the teacher's presentation at the Youth Awards Luncheon, Public Service Dinner, and his recent seven Northern California Chapter and Nevada visits. • Thanked Brian Stephens (CA) for scheduling these visits and Don Littlefield (CA) for arranging the special Sacramento Chapter area meetings. • He stated that he enjoyed talking to members during visits and stressed the importance of providing the tools needed to our members and passing information and knowledge down. • VPG Moore was excited to take the CA 1776 Book Challenge idea to Hawaii and Nevada, and he encouraged all chapters to hold an America 250 minute at their meetings. • He echoed the President General's encouragement to use Facebook, newsletters, and podcasts to promote the SAR. • His goal is to get all WD States (CA, HI, & NV) to pass legislation creating an America 250 Commission. VPG Moore said that he would write a letter to their State Governors to encourage establishment of a 250th Anniversary Celebration Commission / Committee in their State, if requested. He encouraged members at Chapter-level to continue their 250 efforts without the state commissions. • VPG Moore explained his membership on three National Committees: <ol style="list-style-type: none"> 1. Veteran's Committee – would like to make sure that every SAR Vet receives their SAR service medals. 2. George Washington Endowment Fund - California is leading the way with the number of new members. 3. Museum Board – Encourage all SAR Members to see the SAR Education Center/Museum Video on YouTube (go to SAR Foundation tab on sar.org to view). <p>continued</p>		

Number of SAR District Meetings Attended:				
State-level Societies	President	Chapter	Meeting Type	City
1.CASSAR	Andy Martinez	San Francisco	Monthly ~ 26	San Francisco
2.CASSAR	Bill Nay	Redwood Empire	Monthly ~ 19	Petaluma
3.CASSAR	David Gilliard	Gold Country	Monthly ~ 14	Auburn
4.NVSSAR	Davis Hess/Roger Lithcotte	Battle Born Patriots	Monthly ~ 14	Reno
5.CASSAR	Steve Belden	Mother Load	AGM ~ 60	Placerville
6.CASSAR	Jon Wroten	Sacramento	Monthly ~ 12	Cordova
7.CASSAR	Jim Klinger	CA State	BOM ~ 60	Long Beach

8.SAR North Central District	Special Presentation of SAR Museum	District	Zoom	Zoom
9. FL Clearwater Ch	Walter Arnold	Chapter event	Chapter event	Bellaire
10. HISSAR	Arthur Tulak	HISSAR	Quarterly	Zoom
11. North Central District	VPG Moberg	North Central District	Period	Zoom
12. FL Tampa Ch	Robbie Robertson	Chapter Event	Annual Chapter Event	Tampa

- He reminded everyone of the ability to make tax free IRS Required Minimum Distributions (RMD) to the SAR and that Megan Krebs at National is available to assist you with the direct transfer information.
- Motion was made by Don Littlefield and seconded by Jim Faulkinbury for the Western District to endorse the same candidates as the California Society. Motion passed unanimously.
 - President General –Dr. Darryl Addington
 - Secretary General – Michael Elston, Esq.
 - Treasurer General – Lee Popham
 - Chancellor General – Edmond McKinley, Esq.
 - Registrar General – Derek Brown and Brooks Lyles
 - Historian General – Jeff Thomas
 - Librarian General – Dr. Keith Weissenger
 - Foundation Board At Large Member – Jim Klingler
 - Foundation Board At Large Member – Sam Powell
- VPG Moore explained there is a timeframe and process in place for selection of the Western District VPG nominee who is announced at the April Western District Meeting and elected in July at the Annual Congress. The presumptive nominee is Brian Stephens, other candidates may submit a nomination via e-mail to VPG Rob Moore at robmoore@hula.net by the end of November 2023. The candidate should include his CV along with his nomination and the name of the person who seconds the nomination.
- VPG Moore wrote letters to the Governors of CA and NV asking them to establish a 250th Anniversary Celebration Commission / Committee in their State and passing the State SAR 250th POC and President contact information to the governors. VPG Moore again established contact with the Hawaii Governor’s office to have them sign the supplied draft EO on the 250th celebration—no movement yet.
- Attended North Central District meeting via Zoom in November 2023
- Attended Annual Tampa Chapter meeting where officers were installed
- The State of Hawaii just established the Hawaii Semiquincentennial Commission with Governor Josh Green signing the Executive Order (EO). The order has three HI SAR members named in the Commission (VPG Moore, HISSAR President Tulak, HISSAR Member Young) plus the HI DAR Regent and HI VA Director. VPG Moore has organized the first Commission meeting for Jan 27, 2024.

Recommendations:

- The CA 1776 Book Challenge is a great way to get our foot back in to schools. Basically, get donations for RW books, label them as donations, approach teachers that you have books and arrive in uniform presenting books. This can be a national program.
- The CA “Fly the American Flag” door knob hanger can be passed out to residential and businesses passively by just hanging it on a door knob (a certificate can be presented later at an event).
- The Revolutionary minute should be encouraged at every chapter meeting.
- All VPGs should be challenged to review District, State, and Chapter websites for operation ability twice a year during their term.

Future Meetings:

FL George Washington Birthday Celebration: February 23, 2024

VPG Meeting at Leadership: March 1, 2024 at 100

NVSSAR AGM: April 20, 2024

HISSAR AGM: April 23, 2024

CASSAR AGM: April 26-27, 2024

Western District Meeting - April 27, 2024

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: Rob Greene		
Filing Date: 31 January 2024	SAR District: Pacific	
Mailing Address: 3030 SE Bybee Blvd.		
City: Portland	State: OR	ZIP Code: 97202
Telephone Number: (503) 474-7317	E-Mail Address: rwgreene@icloud.com	
SAR Meetings & Events Attended Since Fall Leadership Meeting:		
<p>October 2023 Lewis & Clark Chapter Mtg. - Portland, OR Oregon Board of Managers Mtg. - Salem, OR Republic Chapter Mtg. - Salem, OR High Desert Chapter Mtg. - Zoom</p> <p>November 2023 Labor Day Parade - Portland, OR Wreaths Across America - Willamette National Cemetery, OR Oregon State Society Boston Tea Party Celebration - Clackamas, OR William Cannon Wreath Laying - St. Paul, OR</p> <p>January 2024 Southern Oregon Chapter Mtg. - Zoom Ft. Vancouver Chapter Mtg. - Zoom Oregon Board of Managers Mtg. - Zoom</p>		

Details of meetings/events described above:

At each Chapter meeting, I provided an update on information I've received about National Society issues/events. Increasing membership was a topic at most Chapter meetings. In Oregon, the impacts of National, State and, in one case, Chapter dues increases were discussed. Oregon increased its dues to cover the cost of liability insurance for its members.

The District has been emphasizing collaboration between Chapters. The Portland Labor Day Parade, Wreaths Across America, Boston Tea Party Celebration, and William Cannon Wreath Laying included participation from multiple Chapters.

The William Cannon Wreath Laying also included collaboration with DAR and CAR, as well as the St. Paul Catholic Parish. The St. Paul mayor and representative of the local historical society also attended this event.

Key upcoming meetings:

Oregon State Society Annual Mtg. - 6 April 2024
 Washington State Society Annual Mtg. - 26-27 April 2024
 Pacific District Meeting - TBD

Sons of the American Revolution Vice President General's Report Form

Vice President General's Name: Derek J. Brown			
Mailing Address:		PO Box 326	
City:	Clayton	State: CA	ZIP Code: 94517
Telephone Number: Cell 925-285-4792		E-Mail Address: DptyDeke@yahoo.com	
Filing Date: Jan 25, 2024		SAR District: International District	

State-level Societies	President	Chapters	Annual Meeting	City
1. UK Society	Jeffrey Brummette	1		
2. Pax Sinica	Steven Quay, MD, PhD	1		

Teleconferences

- International District (2023) – Jun 11 (hosted by Pax Sinica chapter)
- Membership (2023) – Aug 21, Sept 4, Oct 16, Nov 15, Dec 11
- Genealogy (2023) – Aug 21, Nov 6, Nov 13, Dec 6
- VPGs (2023) – Aug 22
- ExCom (2023) – Aug 23, Oct 29, Nov 29, Dec 27
- Strategic Planning (2023) – Aug 30, Oct 24, Nov 8; (2024) Jan 11, Jan 18

Report and Recommendations

- Teleconferences on various committees were attended to gain information of value to the International District.
- The International District continues to grow and has 55 members as of 1/1/24. Continued facilitating entries to the Youth Programs from the International and European Districts.
- A list of compatriots dropped within the past 5 years was developed and forwarded to officers of the ITSSAR and the European District. This list includes approximately 63 compatriots within the International District (primarily Canada and those with APO/FPO addresses) and 26 within the European District (primarily France). Efforts are being made to recover/reinstate those inactive members, similar to what is currently being done within the state societies and chapters within the United States.
- A subcommittee was formed under the Membership Committee to evaluate and recommend methods to increase membership of DoD employees (military and civilian) deployed overseas. There are approximately 1.3 million males in the US military subject to deployment and approximately 1100 military bases worldwide, with about 2/3 of those bases outside the US. This long-term evaluation will require input from other committees and individuals. The schedule and overall impacts to the Society and the International District are unknown at this time.

Sons of the American Revolution Chief Compliance Officer Report Form

Chief Compliance Officer Larry Gene Stevens			129831
Street Address 1706 Chestnut Grove Lane	Town: Kingwood	State: Texas	ZIP Code: 77345
Telephone: 832-814-7132		Email: wardtracker@aol.com	
Filing Date: January 31, 2024			

REPORT AS 1/31/2024

Since the 133rd NSSAR Congress:

- Conflict of Interest Forms have been signed and received. According to the directive of the SAR Trustees, all members, as stated in the Compliance Policy, must sign the Conflict of Interest Form. PG John Dodd requested all, if they had not signed Conflict of interest forms for the current term, 2023-2024, to please do so.
- All Officers and VPGs have current forms on file.
- Headquarters Staff have signed forms on file.
- All Trustees, Alternate Trustees, PPGs, without current Conflict of Interest Forms were e-mail the week of January 1, 2024.
- As of this report, 134 have signed Conflict of Interest forms. And 43 have not, most of which are Alternate Trustees. Some forms are still being received.
- Conflicts of Interest forms will be a part of the Spring Trustees registration packages and the form will be available before the Trustees meeting March 2, 2024.
- No compliance issues have been reported to date.

Report and Recommendations:

- Officers, Trustees, VPG's, Committee Chairman, Appointed Positions, should be asked to sign Conflict of Interest Forms before or when assuming office at the Annual Congress.
- Those not attending should be asked to sign at the earliest opportunity.
- Headquarters staff signs the Conflict of Interest form annually in January, and the signed forms are placed in individual personnel files.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 05 February 2024

COMMITTEE NAME: Americanism Chairman: James F. Engler, Sr.
 Chairman's Address: 2038 Red River Rd. Sykesville, MD 21784 Chairman's Phone No. 443.280.7406
 Meeting Dates & Location: 22 September 2023
 Teleconference Dates: 24 October, 27 December, 24 January 2024
 Committee Communications by Mail or E-Mail, Dates: September (01, 06, 10-12, 14, 17-20, 23, 24, 26-30);
October (02, 05-08, 10, 16-22, 24, 28, 30, 31); November (01, 03-08, 10, 12-14, 19-21, 25, 27, 28); December
(09, 10, 12, 14-20, 23, 27-29, 31); January (02, 04-31); February (01)
EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at Meetings: J. Engler (MD); S. Gahafer (KY); S. Giltner (KY); B. Hannah (AL); B. Hulse (KS); D. Jessel (GA); V. Lemmer (WA); K. Morris (VA); E. Spray (OH); D. Van Hoff (MI); M. Weyler (VA). Guests: R. Atkins (VA); M. Aycock (NC); W. Behnke (IN); P. Horton (TN); S. Kopsick (PA); G. Ohanesian (SC); M. Wilson (VA); D. Witter (OR).

Teleconferences: **24 October 2023**: W. Brown (GA); J. Engler (MD); D. Corey (VA); S. Giltner (KY); B. Hannah (AL); B. Hulse (KS); B. LeJeune (LA); V. Lemmer (WA); G. Lucas (WA); K. Morris (VA); E. Spray (OH); D. VanHoof (MI); M. Weyler (VA). **27 December 2023**: M. Anthony (GA); J. Engler (MD); D. Corey (VA); W. Crain (VA); S. Gahafer (KY); S. Giltner (KY); B. Hannah (AL); B. Hulse (KS); V. Lemmer (WA); G. Lucas (WA); K. Morris (VA); E. Spray (OH); G. Thurmond (GA); D. VanHoof (MI); M. Weyler (VA). **24 January 2024**: D. Addington (TN); M. Anthony (GA); J. Engler (MD); S. Giltner (KY); B. Hannah (AL); B. LeJeune (LA); V. Lemmer (WA); B. Lyles (NC); K. Morris (VA); M. Weyler (VA).

Other Service (specify):

REPORT & RECOMENDATIONS (*include progress on goals*):

At the Committee Meeting in Louisville on 22 September, the following items were covered:

- Events based Training. Chairman is looking for volunteers to help with training – please contact Chair (five-minute modules per each type of event is the current thought).
- The EXCOM has approved removing honorable mention and allow 2nd & 3rd Place winners. While this will allow a chapter/society to win first place for multiple years, it hasn't happened often.
- Chair is attempting to extract stats from all reports, to provide meaningful info to the committees. Chair will provide info reports for NSSAR committees for their review.
- The committee is standing up liaisons between our committee and other committees to get better insight into what they need in terms of reported statistics. A number of members volunteer to serve in this role with other committees of which they are members.
- The chairman expressed his goal of increased participation measured in scoresheet submissions for 2023 of a minimum of 5% more chapters and 5% for societies.
- Several members spoke on the importance of the scoresheet and how they encourage them locally.
- The committee agrees it is important for chapters to know their state's Americanism Chair.

- How do we incentivize the state societies and chapters to do their reports? Response and agreement that state presidents who are lackluster could be called out.
- It was noted that there was a learning curve on filling out the report. Once an expert leaves, it is noted that a state society's ranking drops until a new person is spun up; state societies should develop and grow assistant Americanism report filers.
- There should be a "cheat sheet" filled out at the event then provided to the state / chapter Americanism report.

At the October meeting,

- Chairman Engler noted he wants to develop an annual activity report. He's developed software to compile all the scoresheets of a year into a single file by section, and now has developed software to create statistical reports on which the annual report is based. He showed this to the attendees. He sees the target audience as the EXCOM and national committees, but it can also be useful for chapters. Stated it was very much a draft.
- The program can also be used to see any outliers in the submitted scoresheets.
- Suggestions for improvement were made as well as questions primarily on tabs 1 and 2.
- The committee members were asked to review the report and provide suggested changes.

At the December meeting, the topics covered were: the progress on getting out the 2024 version of the scoresheet; progress of extracting data from the 2011-2021 scoresheets, akin to what has now been done to the 2022 scoresheets; and liaisons with other committees.

The January meeting continued with the same themes. The data extract has been done for all years, although there were some issues with individual scoresheets that prevented extraction in some cases.

Meanwhile, efforts have been going on to identify points of contact for each state, serving as the coordinator for the chapter and state society scoresheets in each state; all but about a dozen have provided that information. The draft of the annual activity report was sent out to national committee chairs and the related liaison from our committee, seeking input on what data would be useful to them and who their liaison is with our committees. We supplied to all state POCs and those who submitted a scoresheet for 2022 a list of the amounts donated to different national funds by chapter (for section 10A).

We have started receiving scoresheets and storing them in ShareFile for review. As we near the 15 March deadline, I fully expect to see a marked increase in submissions.

Respectfully Submitted,

James F. Engler, Sr.
Chairman, Americanism Committee

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 1/25/24

COMMITTEE NAME: Audit Committee Chairman: Harry Roberts

Chairman's Address: 133 Brittany Way, Bear, DE 19701 Chairman's Phone No. 302-757-6429

Meeting Dates & Location: January 22, 2024, 7:00 PM EST via Zoom

Teleconference Dates: _____

Committee Communications by Mail or E-Mail, Dates: Various

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)):

H. Roberts (DE); K. Collins (GA); J. Ferris (CA); W. Fristensky (NJ); S. Hinson (OH); M.Seibert (PA);
NSSAR Treasurer General M. Elston; GO Liaison (VA.).

Guests:
NSSAR Finance Director Megan Krebs

Teleconferences: None

Other Service (specify):

REPORT & RECOMENDATIONS (*include progress on goals*):

1. The Audit Committee had one meeting since 2023 Fall Leadership, which occurred on 1/22/24. At that meeting the following occurred:
 - a. The minutes of the 9/22/23 committee meeting was reviewed and approved without changes.
 - b. Per the Bylaws, the Audit Committee is charged with recommending, subject to ratification by the Board of Trustees at its Fall Meeting, an outside independent auditing firm to conduct the annual audit of the National Society and Foundation. At a previous committee meeting, the need was discussed to proactively have in place a process/procedure and template for issuing a request for proposal (RFP) in the event we needed to identify/recommend a new audit firm.

Presently, a pricing agreement is in place with the current firm, Dean Dorton, to conduct the audit and prepare the 990's up through the 2023 audit/reporting cycle for presentation at the 2024 Congress. While there is no dissatisfaction with the present firm, if due to pricing concerns, there is a need to solicit new proposals, we need to be ready now to accomplish that task. Committee member K. Collins will be collecting examples of processes and templates for the committee to consider at this Spring Leadership meeting.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: February 1, 2024

COMMITTEE NAME: Budget Chairman: Dan McKelvie
Chairman's Email Address: mckelvie@sbcglobal.net Chairman's Phone No. _____
Meeting Dates & Location: March 1, 2024 (Brown Hotel)
Teleconference Dates: 12/6/2023; 12/13/2023; 12/22/2023
Committee Communications by Mail or E-Mail, Dates: 10/27/2023;10/30/2023;12/5/2023; 12/6/2023; 12/11/2023; 01/02/2024

EXPENSES: none

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)");

Attendance at Meetings: D. McKelvie (CA); D. Boring (DC); M. Elston (TG); E. Hoak (MA); W.Popham (FL)
M. Krebs (Director of Finance)

Teleconferences: D. Mckelvie (CA); D. Boring (DC); M. Elston (VA) (Treasurer General); E. Hoak (MA); W. Popham (FL), M. Krebs (Director of Finance)

Other Service (specify):

REPORT & RECOMMENDATIONS: The Committee prepares the current budget and submits tentative budgets for several years in advance and reports to the Finance Committee, Executive Committee, and President General through the Treasurer General.

KEY PERFORMANCE INDICATORS

- The SAR is among the over 10,000 professional membership organizations in the United States. Those organizations can be categorized in to 3 (sometimes overlapping) categories:
 - Member Benefit organizations: examples include American Institute of CPA’s, American Bar Association, American Medical Association.
 - Professional regulations organizations with the examples cited above.
 - Certifying organizations: examples include the National Association of State Boards of Accountancy and National Association of Parliamentarians.
- The success of a membership organization can be measured using Key Performance Indicators (KPIs). The Membership Growth Rate is such a Key Performance Indicator. The KPI evaluates the net increase in your membership base over a specific period, providing a clear picture of the organization’s recruitment success.
- Professional Associations have experienced the following membership growth rates over the preceding 3 years:
 - 32% grew between 1 and 5%
 - 25% experienced 0% growth
 - 11% experienced negative growth

- Drilling down to the SAR level, the Budget Committee members, the SAR Executive Director, and Director of Finance concluded that the membership growth rate at the ‘top end’ of the KPI range was no longer based on the current empirical data. The consensus was to “dial back” to a more conservative KPI growth in membership. The table below is the KPI’s “estimated” *before the committee began* its work in August 2023:

2023	2024	2025	2026
5.7%	4.9%	5.8%	5.5%

- The Budget committee members, the SAR Executive Director, and Director of Finance invested hours of time in “Teams” meetings and spreadsheet calculations and revisions.
- The December 22, 2023, consensus KPI membership growth rate for the 2024 budget and forecasts are shown in the table below:

2023	2024	2025	2026
0.09%	-1.69%	0.0%	0.0%

- Delving further into the member revenue sources, the committee data driven analysis determined the number of new member applications is not moving in a linear upward trend. The projected new applications for budget purposes are now revised as shown in the table below:

2023	2024	2025	2026
3,120	3,150	3,180	3,210

- The revised estimate of the number of member supplemental applications for the 2024 budget an appear in the table below:

2023	2024	2025	2026
1,100	1,150	1,160	1,170

- The inverse of membership growth rate KPI is the annual membership “drop” percentage KPI. The data table below illustrates the effect of negative KPI percentages (Y-axis) on sample year end membership (X-axis). The 2024 Budget forecasts a 14% KPI drop rate.

	34,400	35,400	36,000	37,000	38,000
-8%	-2,752	-2,832	-2,880	-2,960	-3,040
-9%	-3,096	-3,186	-3,240	-3,330	-3,420
-10%	-3,440	-3,540	-3,600	-3,700	-3,800
-11%	-3,784	-3,894	-3,960	-4,070	-4,180
-12%	-4,128	-4,248	-4,320	-4,440	-4,560
-13%	-4,472	-4,602	-4,680	-4,810	-4,940
-14%	-4,816	-4,956	-5,040	-5,180	-5,320
-15%	-5,160	-5,310	-5,400	-5,550	-5,700

STRATEGIC AND TACTICAL SUMMARY OF CHANGES

- ✓ Addressed the top line issue (member headcount) – projected 2024 headcount reduced from 41,000 to 38,000.
- ✓ Adjusted forecast application and supplemental fees after evaluation.
 - Application fee metric = 13 new applications per day
 - Forecast application revenue decline = \$50 K
 - Supplemental fee metric = 5 per day
 - Forecast supplemental fee revenue decline= \$25 K

REVENUE ANALYSIS

Revenue center	Annual Revenue	Percent of total	Cumulative percent
Membership Dues	\$ 1,949,700	69%	69%
Application Fees *	\$ 315,000	11%	80%
Supplemental Fees *	\$ 115,000	4%	84%
Merchandise (net)	\$ 197,800	7%	91%
A. Hamilton distribution	\$ 110,000	4%	94%
Building & Outreach Education	\$ 82,100	3%	97%
Other Revenue	\$ 75,000	3%	100%
Total	\$ 2,844,600	100%	

EXPENSE ANALYSIS

Cost center	Annual cost	Percent of total	Cumulative percent
General and Administrative	\$ 1,593,200	64%	64%
Magazine (net)	\$ 239,500	10%	73%
Education (net)	\$ 231,300	9%	83%
Library (net)	\$ 194,400	8%	90%
Occupancy and Maintenance	\$ 116,200	5%	95%
Interest expense on external debt	\$ 60,000	2%	97%
President General Expenses	\$ 45,000	2%	99%
Medals & Awards	\$ 20,000	1%	100%
Total	\$ 2,499,600	100%	

DEBTSERVICE & DISCRETIONARY ANALYSIS

Cost center	Annual Budget	Percent of total	Cumulative percent
Paydown line of credit	\$ 100,000	29%	29%
Transfers to PP&E for IT Enhancements *	\$ 65,000	19%	48%
National Dues Billing Fees & Maint Expenses	\$ 48,000	14%	62%
Marketing & PR Funds*	\$ 27,000	8%	70%
Security upgrades and outreach equipment	\$ 25,000	7%	77%
Digitization Equipment	\$ 20,000	6%	83%
New Member Marketing, Retention and Orientation Programs	\$ 20,000	6%	88%
SARACAR (Building & Outreach Education Fund)	\$ 15,000	4%	93%
Provision for replacement and renewal of technology	\$ 10,000	3%	96%
Education Committee - Mission Fulfilment Projects	\$ 10,000	3%	99%
Support of C.A.R. Operations	\$ 5,000	1%	100%
Total	\$ 345,000	100.00%	

✓ To keep the 2024 Budget “in balance”:

- \$75K in “discretionary” expenses need to be reduced.
 - Equipment for Information Technology = a reduction of \$25K
 - Marketing & Public Relations = a reduction of \$50K

- ✓ The deliverable is a balanced 2024 budget:
 - Revenues = \$2.85M
 - Expenses = \$2.50M
 - Debt Service & discretionary = \$.35M

- ✓ Goal: Budgets for calendar years 2025, 2026, 2027 will be available by Congress in July 2024.

Respectfully Submitted,

David G. Boring

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
CONGRESS COMMITTEE REPORT

Filing Date: 05 February 2024

COMMITTEE NAME: Color Guard Chairman: K. Scott Collins

Chairman's Address: 130 Cherokee Forest Dr, Athens, GA 30601-1052 Chairman's Phone No. (706) 207-1663

Meeting Dates & Location: 22 September 23, 2:00pm EST, Color Guard Committee Meeting, Citation A/B, The Brown Hotel, Louisville, KY

Zoom Meeting Dates: _____

Committee Communications by Mail or E-Mail, Dates: Various emails and phone calls between Chairman Collins, Vice Commander Robert Meyer, Adjutants Kenneth Goodson and Patrick Wesolosky and the staff over upcoming events, previous staff Zoom meetings, and upcoming National SAR events.

EXPENSES: None during this period - Safety Officer Brett Osborn is working on a training video dealing with sword procedures similar in style to the three videos produced last year that are on the Color Guard website.

PARTICIPATION: Attendance at Fall SAR Leadership Meeting:

COMMAND & STAFF: K S Collins (GA) Commander; R Meyer (NJ) Vice Commander; P Wesolosky (KY) 1st Adjutant; B Osborn (VA); J Vink (IN), V Lemmer (WA); C Canine (KY)

COLOR GUARDSMEN: B Austin (WI); R Anderson (AL); T Bailey (OH); B Baran (AZ); J Barker (AL); W Behnke (IN); S Biggs (MO); K Bonner (VA); J Bendenfoerder (OH); T Brown (KY); R Butler (WV); P Callanan (MI); D Cook (VA); H Cox (WV); P Davenport (VA); J Doss (KY); W Edelen, Jr (GA); S Gahafer (KY); A Greenly (GA); R Haglund (WI); R Helderman (IN); B Hale (?); S Hinson (OH); D Hoover (MD); B Hulse (KS); H Jackson (NH); P Kelly (FR); G McCoy (MO); C McMillan (MO); D Miller (OH); C Moberg (MN); P Moller (DE); E Moyer (MD); L Raborg (MD); A Robinson (OH); E Rigel, Jr (GA); M Robertson (MO); W Schwetke (VA); W Sharp (IN); E Spray (HI); S Sullins (MO); G Strunk (NC); R Vance (NM); B Villardi (CA); M Weyler (VA); M Wilson (VA)

Other Color Guard Staff Service:

1. On October 7 - Battle of Kings Mountain, Blacksburg, SC
2. On October 8 - Point Pleasant Days, Point Pleasant, WV
3. On October 14 - Battle of Chestnut Neck, Port Republic, NJ
4. On October 19 - Gov. Nelson Wreath Laying, Yorktown, VA
5. On October 22 - Battle of Red Bank, National Park, NJ
6. On November 11 - Veterans Day
7. On November 18 - Siege of Fort Morris (Sunbury), Midway, GA
8. On December 2 - Battle of Great Bridge, Chesapeake, VA
9. On December 16 - Wreaths Across America
10. On December 16 - 250th Anniversary of the Boston Tea Party, Boston, MA
11. On December 26 - Battle of Trenton, Trenton, NJ
12. On January 7 - Princeton, the Ten Crucial Days, Princeton, NJ
13. On January 17 - Battle of Cowpens, Gaffney, SC
14. January 27 - Battle of Cowans Ford, Huntersville, NC

REPORT & RECOMENDATIONS:

1. As of the date of this report, approval has been granted for 35 Silver Color Guard Medals, 7 von Steuben Medals, and 1 Molly Pitcher Medal. Several more medal applications will be reviewed in the upcoming week.
2. The National Color Guardsman of the Year will be voted upon at Spring Leadership. You must be present to vote. Each state only gets one vote, so please decide in advance who will cast the vote for your state. In addition to those votes, prior recipients of the National Society SAR Gold Color Guard Medal (National Color Guardsmen of the Year and National Color Guard Commanders) also vote.
3. Please complete and file the After-Action reports. On the Historic Sites and Celebration Committee webpage there is an Event Reporting Template for you to use. A couple of states have their own template that was developed before this template was posted. I am happy to provide you with some sample reports that have been previously filled. We strongly encourage you to file these reports. We want to know what went great and what some issues are. Several events have gone for several years without letting anyone know about the health of the event. With more national events coming online, there is talk of looking at existing events to see if they should continue. Please help yourself by completing the After-Action Report.
4. Outside of the Command and Support Staff, the National Society SAR Color Guard depends on the 41 state societies and their associated chapters that have color guards for its existence. Without participation from our compatriots, we would not have our color guards to represent us as the face of the SAR. It has been a pleasure to attend various National Society SAR events around the country and to work with our fellow compatriots.
5. The first 250th anniversary events have started and will continue over the next ten years. The signature 250th anniversary event for 2023 was the Boston Tea Party on 16 Dec 2023. The SAR Color Guard was front and center on the rolling rally from Old South Meeting House to Harborwalk where Griffin's Wharf once stood. Much tea was destroyed.
6. The October 2023 and January 2024 editions of the SAR *Colorguardsman* was published by email after the conclusion of the National SAR Congress. The magazine contained 52 pages and 75 pages respectively of material on the color guard. Please verify your society's commander, note the future dates for articles to be submitted for potential publication, and upcoming national events.
7. Past Commander Raborg was successful in getting the new Color Guard Youth Medal approved. The medal is for children (any child under the age of 18) that have participated in at least 3 CG events each year, for at least 3 years. A form to be used with this medal is expected by Spring Leadership.
8. If you have not already done so, please watch the three Color Guard safety and training videos that have been posted to the National Society website on the Color Guard Committee page where they can be accessed by all state and chapter Color Guardsmen.
9. The first working draft of a revised National Color Guard Handbook is expected for Spring Leadership.
10. **All Command Staff Officers are requested to write an article or provide input on activities for submission to our quarterly Color Guard publication.** We want the magazine to be our way of talking with the State Color Guard Commanders and of getting information directly to all Color Guard members, nationwide.
11. **Upcoming National and Regional Color Guard events** occurring between Congress and Fall Leadership. Check with sponsoring societies for exact dates:

a.	10 Feb 2024	Saturday	Battle of Kettle Creek	Georgia
b.	17 Feb 2024	Saturday	Crossing the Dan	Virginia
c.	17 Feb 2024	Saturday	George Washington Parade	Texas
d.	24 Feb 2024	Saturday	Battle of Moore's Creek	North Carolina
e.	15 Mar 2024	Friday	Battle of Guilford Courthouse	North Carolina
f.	16 Mar 2024	Saturday	Last Naval Battle	Florida
g.	12 Apr 2024	Friday	Halifax Resolves	North Carolina
h.	23 Mar 2024	Saturday	Battle of Thomas Creek	Florida
i.	15 Apr 2024	Monday	Patriot's Day Celebration	Massachusetts
j.	20 Apr 2024	Saturday	Frederica Naval Actions	Georgia
k.	08 May 2024	Wednesday	Battle of Pensacola	Florida
l.	25 May 2024	Saturday	Fort San Carlos	Missouri

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 1 Feb 2024

COMMITTEE NAME: Congress Planning Committee Chairman: Paul R. Callanan

Chairman's Address: 611 Brookstone Court, Marquette, MI, 49855 Chairman's Phone No. 906-273-2424

Meeting Dates & Location: 22 September 2023,

Teleconference Dates: Multiple meetings with PA, CT, NC, Southern District, and OH Congress committees via Zoom.

Committee Communications by Mail or E-Mail, Dates: Multiple emails with PG Wright, PG Pickette, PG Dodd, HQs Staff, HelmsBriscoe, FL Congress Committee (D. Elam, M. Mathews, D. Young, S. Fields), PA Congress Chair Clarke, CT Congress Chair Taylor, NC Congress Chair DeLoach, NC Congress Vice Chair Powell, Southern District Chair B. Hayes, Members of Southern District Congress State Chairs, OH congress Chair Wilkerson, Members of ExCom, Members of various committees

Expenses: N/A

PARTICIPATION

Attendance at Meetings: Multiple Zoom meetings with both PA, CT, NC, Southern District, and OH via Zoom

Guests at Meetings:

Teleconferences: Multiple phone conversations with FPG Wright, ExCom, PG Dodd, TG Elston, Megan Krebs, Todd Bale, Mike Scroggins, Kelly Moore, PA Congress team, CT Congress team, NC Congress team, Southern District Congress team, and OH Congress Team. Also Communications/Publicity and Media Committee.

Other Service (specify):

REPORT & RECOMENDATIONS:

<p>2024</p>	<p>134th Congress: (9 – 16 Jul) Pennsylvania Society was selected to host the 134th Congress. It will be held in Lancaster, PA. The hotel is the Lancaster Marriott at Penn Square. At this time, the hotel is full. The closest hotel is the Holiday Inn Lancaster on Chestnut Street. Phone number (717) 394-0900. The present lineup of 11 July tours is to do one for Valley Forge with a bench dedication during that tour or a tour to York, PA, with a second bench dedication. Tours on 15 July will be to Kitchen Kettle Village and Amish Country or one to the Lancaster Railroad Museum with a ride on the train. The Host Society is planning a long tour on the day after Congress to take members who sign up to Philadelphia for the day to see some of the historical sites in that city or the option of doing a day-long tour of some of the sites of the Philadelphia Campaign led by Roger Williams.</p>
<p>2025</p>	<p>135th Congress: (11 – 17 Jul) Connecticut Society will be the host for the 135th Congress at the Mohegan Sun Resort in Uncasville, CT. The society is working on fundraising and worked with the Mohegan tribe to develop a unique Congress Medal which incorporates some of the Mohegan symbology into the medal. One of the tour options will be a visit to Mystic Seaport, and the society is</p>

	working on other ideas. Their website has a lot of information on the surrounding area and some ideas for touring before or after Congress.
2026	136th Congress: (10 Jul – 16 Jul) North Carolina was selected as the host for the Congress. The contract is with Sheraton Greensboro Hotel at Four Seasons. They have a Congress Medal and lapel pin for sale. The Ladies Auxiliary has a pin for their fundraiser starting at Spring Leadership. Tours are already set. Long tours will be to Old Salem or to Historic Hillsborough. The short tours are to Guilford Courthouse with grave marking, and, for the ladies, a tour to Replacements Ltd. Additionally, they are planning a post-Congress grave marking for those interested.
2027	137th Congress: (7 Jul – 15 Jul) Southern District was selected as the host for the Congress. The hotel is the Marriott New Orleans, 555 Canal St., and the contract with the hotel is complete. They have an approved medal set and also a lapel pin for fundraising for the Congress. The Ladies are looking into developing a pin for the Congress as well. Their future planning will concentrate on tours and continued fundraising.
2028	138th Congress: (TBD) Ohio Society was selected as the host for the Congress. They have had an information meeting with National Congress Chair. They have some excellent ideas of how to make this a very memorable Congress. The site visit by National for hotel selection is tentatively scheduled for late April. Hopefully a hotel contract will be in place before Congress.
	Congress Site Selection Committee and Future Congresses - approval is no more than 5 years out. It should be noted that 4 years is when site tours and contracting will begin. It is also the length of time that the DAR sets their dates for their Congress. Future Congresses are to be scheduled so that they do not start or end less than two (2) days either side of July 4 th .

Respectfully submitted,

Paul Callanan
Chair

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 2 Feb 2024

COMMITTEE NAME: Congress Review Chairman: Paul R. Callanan
 Chairman's Address: 611 Brookstone Ct., Marquette, MI 49855 Chairman's Phone No. 7047560363
 Meeting Dates & Location: 4 Dec 2023
 Teleconference Dates: _____
 Committee Communications by Mail or E-Mail, Dates: Multiple emails to members

EXPENSES: NONE

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)):

Attendance at Meetings: P. Callanan (MI); W Alter (AZ); D. Wright (DE); M. Elston (VA); N. White (TX); J. Dodd (CA); K. Weissinger (WA); D. Addington (TN); E. McKinley (AL)

Guests: Howard Fisk, Kelly Moore, Todd Bale, Drew Hight, Mike Scroggins

REPORT & RECOMENDATIONS (*include progress on goals*):

Following tasks are scheduled for discussion:

1. Review of Congress Rules. Needs to go to Bylaws for approval of changes.
2. Developed initial revised Memorial Service Script. Have a revised script with CG Welkner for comments. Need to identify readings, participants, and songs for the service. Need to procure the music for inclusion in the program.
3. Develop a new Compatriot Death Report that allows for input for the Memorial Service. Congress chair will talk to CoSP at Leadership for their assistance in this area.
4. Merchandise: has a base list of items to take, heavy on apparel which are the big sellers. Focus on the Decade of the American Revolution merchandise (Tea Party and First Continental Congress); also some medals items and coins. Key is to maximize sales and not have to ship much back to National after Congress.
5. Increasing Silver and Bronze Congress Appreciation Medals numbers was discussed and recommended for approval. Gone to M & A and Excom where they were approved.
6. Nametag holders for Congress and Leadership. Have a prototype selected. Need to get one with our Logo on it, also going to look into getting a long-term sponsor like Family Tree or Ancestry to foot the bill. Will have SAR Logo. If we decide to sell them to others will need to have permission from sponsor.
7. Welcome letter for new attendees. We have a fairly comprehensive document on the webpage and probably do not need to have a separate letter. We do need to add a submenu to the page for the dress code.

8. Meeting with Communications on videotaping and streaming at Congress. We have contracted to live stream the Memorial Service. Some concerns on making sure people know ahead of time that we are doing that if they do not want to be on the stream. Also still working on how to do some of the other events as videotaping. Will need to consider some issues like when do we publish, notifying members that it is going to be done. Details to be worked out on all sides.
9. Public Relations plan to be developed. This should include interviews, events to be publicized, timing of those events being posted to different platforms, who needs to receive press releases, and any other parts. Draft before Leadership.

Respectfully submitted,

Paul R. Callanan

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: January 31, 2024

COMMITTEE NAME: Council of Vice Presidents General Chairman: VPG Edgar S. Hoak

Chairman's Address: 31 Swing Drive, Berkley, MA 02779 Chairman's Phone No. 401.965.9840

Meeting Dates & Location: Fall Leadership (23 September 2023)

Teleconference Dates: _____

Committee Communications by Mail or E-Mail, Dates: Various / Numerous

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at Meetings:

Members Present:	Chairman E. Hoak (MA)	VC Rob Moore (HI)	
	W. Baran (AZ)	D. Brown (CA)	J. Engler (MD)
	S. Gaines (TN)	R. Greene (OR)	S. Hinson (OH)
	B. Hulse (KS)	C. Moberg (MN)	E. Rail (ID)
	D. VanHoof (MI)	J. Vermaelen (NY)	J. Wyrosdick (SC)

Members Not Present: P. Mesnard (FR)

Guests: George Strunk (NC) Clifford Olsen (MO)

REPORT & RECOMENDATIONS (*include progress on goals*):

1. The Fall Leadership District Meeting focused on status of district websites, reports on district activities, and how the Council of VPGs (CoVPG) will answer the bell regarding membership concerns.
2. The primary method for sharing information and communication for the CoVPGs has been through email.
3. All VPGs are active in their districts and are actively employed to flow information to constituent member state societies. Refer to district VPG reports.
4. The CoVPG assisted the Membership Committee in flowing information to district constituent members to facilitate the push for membership retention and reinstatement during the 2023/2024 dues season.
5. VPG Moberg of the North Central District holds regular Zoom district meetings. All VPGs are invited to participate. At the August 2023 CoVPG meeting, all VPGs were encouraged to attend / participate in at least 2 other districts' meetings to cross-pollenate / learn from others' programs. This is having mixed success and will continue to be encouraged.

6. The Council of VPGs (CoVPG) is an underutilized resource. It should be leveraged in a manner similar to the Council of State Presidents (CoSP) in flowing down communications, requests, and direction. This was brought forward to the Strategic Planning Committee. VPGs have a broader view of ongoing activity and are or should be participating in all their constituent member societies' events. VPGs therefore can be thought of as a tool to overcome communication silos in promoting interstate communication beyond semi-annual District Meetings to be employed by National Committees to help accomplish their goals.

Other Service (specify):

N/A

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: February 5, 2024

COMMITTEE NAME: C.A.R. Liaison Chairman: Darrin Schmidt
Chairman's Address: 751 Park Ave., Herndon, VA 20170 Chairman's Phone No. 703-955-7333
Meeting Dates & Location: _____
Teleconference Dates: February 16, 2023
Committee Communications by Mail or E-Mail, Dates: _____

EXPENSES: \$1000 donation to the C.A.R. National Project (2023-2024)

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at Meetings:

Spring Meeting 2023

G. Cheney (CO); H. Jackson (NH); Dd. Kraft (MA); J. Manning M.Ed. (NH); L. McKinley (VA); K. Mullen (VT);
R. Reese, Jr. (GA); D. Schmidt (VA); W. Seaton (AZ); B. Stephens (CA); H. Voegtler (TX); W. Alter (AZ)

Other Service (specify):

2024-2025 GOALS (as approved by the President General):

- I. C.A.R. Liaison Activities
 - A. Encourage State Societies to establish or expand C.A.R. Liaison Chairmen and committees within their respective state chapters (23 states currently represented).
 - B. Reach out to the unrepresented states where C.A.R. is active.
 - C. Encourage SAR members to work with C.A.R. members and serve as C.A.R. Senior Leaders.
 - D. Encourage chapters to enroll C.A.R. members as Junior Members in the SAR.
 - E. Encourage chapters to get C.A.R. members involved in SAR committees.
- II. Financial Support
 - A. Present C.A.R. president with a check to support project (typically at the SAR Youth Luncheon).
 - B. Investigate funding the award.
 - C. Investigate funding endowment.
- III. C.A.R. Activity Streamer – Judge Submissions.
- IV. SAR/C.A.R. Medals of Appreciation.
 - A. Manage SAR/C.A.R. Medals of Appreciation.
 - B. Award Gold SAR/C.A.R. Appreciation Medal(s).

REPORT & RECOMENDATIONS *(include progress on goals):*

Report

- C.A.R. awards committee incorporated all SAR youth awards into the 2023-2024 National Program packet to encourage C.A.R. member participation.
 - Approved one C.A.R. Gold Medal of Appreciation for the C.A.R. National President, C. Cagle Kaough
- Prepared TG Elston to represent the SAR in lieu of PG Pickette at the C.A.R. National Convention in April 2023 where he:
 - Presented the Gold Medal of appreciation to National President C. Cagle Kaough
 - Announced SAR's \$5000 donation, continuing support of the C.A.R. Operations Fund
 - Announced the recipient of the Travelling Banner (Alabama and North Carolina)
- Reviewed 21 state submissions for C.A.R. Activity award and recommended 18 states for streamers (3 were past the submission deadline).
- Successfully incorporated virtual meetings to allow more flexibility to conduct meetings and to support remote attendance.
- Continued populating a ShareFile folder for committee documentation.
- Updated and posted list of past Gold Medal recipients for reference and historical purposes.
- Continued discussion with members of the Color Guard committee regarding options for recognizing C.A.R. color guard participation at SAR events.
 - Initial discussion indicates that existing SAR medals would not be suitable for this purpose, for various reasons, but a separate medal specifically for C.A.R. members would be easier and more appropriate.
 - The latest information indicates that the medals are approved and need to be funded and ordered.
- Continued promoting the Youth Protection Training for all committee members.

Recommendations:

- Continue working to expand C.A.R. Liaison activities to the State Society level.
- Continue working to generate opportunities for interaction between the C.A.R. and the SAR.
- Continue working on initiatives to fund the annual C.A.R. National Project contribution.
- Investigate options to spend the extra endowment funds.
- Contact Youth Awards Recognition Committee regarding recommendation to recognize C.A.R. members as part of the overall program.

Continue working with SAR Color Guard and SAR Medals & Awards Committees to discuss options for recognizing C.A.R. members for their color guard participation at SAR events.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: February 03, 2024

COMMITTEE NAME: King Eagle Scout Subcommittee Chairman: David J. Perkins
 Chairman's Address: 3 Clearview Avenue, Bethel, CT Chairman's Phone No. 203-797-1967(H)
 Meeting Dates & Location: Friday, 22 Sep 2023, at Fall Leadership in Louisville
 Teleconference Dates: Zoom – Tues, Jan 30, 2024 at 8pm By Mail/E-Mail, Dates: Emails/Phone calls as needed.

PARTICIPATION:

Fall Leadership 22Sep2023 Attendance: Chair D. Perkins (CT); VC Ed Rigel, Jr. (GA); E Rigel, Sr, (GA); D Brown (CA); T Brown (KY); H Cox (WV); J Deloach (NC); J Fisk (MO); W Greenly (GA); K Mullen (VT); J Petres (MI); E Spray OH; H Voegtle (TX); A Null (Ger); Cl. Olson (MO); R. Haglund (WI); Gary Gift (MO).

Guests: R Smith (MN); T. Hagan (NV); H. Jackson (NH)

Zoom - 30 Jan 2024 Attendance: Chair D. Perkins (CT); VC Ed Rigel, Jr. (GA); E Rigel, Sr, (GA); D Brown (CA); T Brown (KY); J Deloach (NC); K Mullen (VT); J Petres (MI); E Spray OH; H Voegtle (TX); A Null (Ger); Cl. Olson (MO); R. Haglund (WI); A Munford (TX); E Alford (AL); B Nay (CA); L Leslie (IL); L Popham (FL); D Chaffin (TN); JD Urbach (MD); J Schatzel (KS); K Waldroup (IN); T Ashby (IL); G. Crow (OK); C Olson (GA); G Jensen (OK)

EXPENSES: None

Goals for 2023-2024

- 1: To expand to at least 40 state societies' entries in the Eagle Scout scholarship contest. (Max. of 44 in 2017)
- 2: Encourage donations to the Eagle Scout Activity Fund for Jamboree, NOAC, Trans-Atlantic Council, etc.
- 3: Review and revise where necessary all documentation used by the subcommittee and on national webpages.

REPORT & RECOMMENDATIONS:

<u>Financials as of the November 30, 2023 SPOF report:</u>	Operating Account:	\$26,365
	Endowment Fund:	\$709,726
Outstanding unpaid scholarship awards (4) still on the books for 2019 thru 2023 totaling \$32,000	Eagle Scout 2024 Budget:	\$32,200
	Eagle Scout Activity Fund:	\$5,590

Expected Distribution for 2024 of 4% = \$28,597

2023 Calendar Year Eagle Scout Scholarship Contest Update

VC Ed Rigel, Jr. has reported that as of Jan 30 he has received 12 entries with several more expected. At the 2023 Fall Leadership meeting, the committee approved removing the \$10,000 cap on monetary awards for repeat winners.

Transatlantic Council Update

Ashley Null spoke at the 2023 Spring Leadership on behalf of the need for this committee to consider financially supporting the Trans-Atlantic Council (Europe/Africa/West Asia/Middle East), and the committee approved and donated of \$2,500 from the Eagle Scout Activity Fund to the Trans-Atlantic Council this past November.

We have received two applications, one from Wiesbaden, Germany, and one from Brussels, Belgium. For this year, because the France Society currently administers Belgium, Patrick Mesnard, the President of the France Society and VPG for Europe, appointed Bernard Deshieux of Brussels, Belgium, to work with Ashley Null in handling the Belgium application. Ashley will also handle the Germany application.

Both Eagle Scouts will receive a monetary award of \$500 and the new Silver Eagle Scout medal. If possible, both Eagle Scouts will be presented their awards at the Normandy Camporee on the beaches in France with 3000 BSA Scouts and 700 French Scouts. The Camporee will be held this year on April 19-21. Special thanks to Ashley Null for his efforts!

New National Winner Medallion and State Silver Medal

On Sept. 14, our committee approved the creation of a National Winner Medallion. The final design was approved by the Medals & Awards Committee and by the Executive Committee in late December. An order for 10 of the new medallion awards along with 50 of the coin center inserts was placed with Ranger Industries with expected delivery to Merchandise in mid-February.

The Silver State Eagle Scout Medal, as part of creating the new Eagle Scout Committee National Award, was also approved and uses the existing bronze Eagle Scout Medal design. It offers the opportunity for more states to provide these reasonably priced medals to their state winners. The Eagle Trophy that has long been used as state awards are becoming very expensive while the quality of the statue was lessening. An order for 100 Silver Eagle Scout medals was placed with the Pin Center with expected delivery to Merchandise in mid-February. Funding for both awards will be from the Eagle Scout Operating Account.

The total cost is \$2,485.00 and is in the current budget for 2024.



SAR – NOAC 2024 Update

At Fall Leadership, we agreed to participate in the 2024 NOAC, with Hank Voegtle committed to be the on-site lead for the upcoming event. It will be in Boulder, Colorado, from July 29 through August 3. Hank, along with Elwin Spray and Tim Brown, have been tasked with reporting back at our 2024 Spring Leadership meeting with an update. We have from the 2023 Jamboree 1,000 of the 250th Anniversary lapel pins available as handouts for NOAC.

Revised Eagle Scout Recognition and Award Program Admin Guide

Vice-Chairman Ed Rigel, Jr. has taken on the task of revising the guide to reflect current contest rules. The new national and state awards will be included later this year, but overall, this is a very good guide to share with all your chapter and state Eagle Scout points of contact. It is located on the Eagle Scout Committee webpage.

<https://www.sar.org/committees/eagle-scout-committee-arthur-king/>

The Eagle Scout Award Contest Brochure is currently being updated by Gary Gift to include the new National and State awards and should be available on the Eagle Scout Committee webpage by later this Spring.

A new Eagle Scout Scholarship Donation Form is also planned for later this year.

Respectfully submitted,
David J. Perkins
Chairman, Eagle Scout Subcommittee

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 03 February 2024

COMMITTEE NAME: Knight Essay Committee Chairman: Ernest B. Coggins
 Chairman's Address: 908 N Lebanon Street, Arlington, Virginia 22205 Chairman's Phone No. (703) 241-2807
 Meeting Dates & Location: Zoom - 03 February 2024
 Teleconference Dates: Zoom - 03 February 2024
 Committee Communications by Mail or E-Mail, Dates: _____

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)):

Teleconference Attendance: Chairman Ernest Coggins (VA); Vice-Chairman Keith Weissinger (WA); Secretary General Darryl Addington (NC); CYP Chairman David Perkins, Derek Brown (CA); Jeff Lightburn (WA); Christopher Smithson (MD); and Viren Lemmer (WA).

Guests: John Critchett (MI); Dick Paul (WA); Jack Duffy (AZ); Doug Doster (SC); Don McGraw (OH); Richard Smith (NY); Roger S. Williams (NJ); and George Pesely (TN).

Chairman's Report:

Chairman Coggins verified the presence of a quorum.

Ongoing Business:

Chairman Coggins reminded the members that the deadline for submission of essays from the State Societies to the National Committee Chairman is **15 February 2024**.

- All entries must include all five parts in PDF format:
 - Application
 - Title Page
 - Essay
 - Bibliography
 - Biography
- All five parts are to be submitted in PDF format.
- Each essay must be submitted by the State Society Knight Essay Contest Coordinator/Chairman.
- Essays **MUST** comply with the following rules:
 - Minimum of 800 words and maximum of 1,200 words (excluding Title Page, Footnotes, Bibliography, and Biography). The word count must be placed on the Title Page.
 - The first page must include the title.
 - No applicant information may be included on the Essay or Bibliography pages.
 - Essays must be typed in Times New Roman, 12-point font, and double-spaced.
 - Essays must be on 8 ½" by 11" paper with 1" margins on all sides.
 - Essay pages must be numbered sequentially, starting with page 1.
 - No graphics, special covers, or bindings are permitted.
- **Essays that do not meet these requirements will not be forwarded to the judges.**

- Applicants must sign the Application Form. The signature must either be written in cursive or printed. A typed name is not acceptable.

The 2023-2024 award amounts are unchanged:

- First Place: \$6,000*
- Second Place: \$3,000
- Third Place: \$2,000
- Fourth Place: \$500
- Fifth Place: \$500

*First Place is eligible for \$1,500 travel stipend for expenses incurred attending National Congress.

New Business:

As of the date of this meeting, only three essay packets have been submitted in the correct format.

Funds (as of 30 November 2023):

Operating Fund: **\$17,457.77**

Investment Fund: **\$307,437.96**

Action Items:

- The Chairman requests the review of State contest data on the second section of the National Knight Essay webpage with special attention to the State's contact information and due date.
- The Chairman clarifies that corrections should be sent to him by separate email with the Subject Line example: "Kentucky Knight Essay Corrections."

Discussion Items:

- Multiple essays are being submitted to the National Chairman or the State Chairmen rather than the Chapter Knight Essay Chairman. An effort needs to be made to clarify the rules and procedures. Then, these need to be made available to the contestants and teachers.
- Compatriot Jeff Lightburn offered a youth awards program "tool kit" to assist State level Chairmen with procedures and helpful hints.
- Most common errors noted by the Chairman:
 - Omission of signature on Application Page.
 - Missing State Chairman contact information.
 - Failure to double space the essay.
 - Failure to submit essays sans identifying information of the contestant.
- Compatriot Pesely recommends removing the National deadline date (15 February) from the National website because students are confusing it with the Chapter level deadline.
- Outreach to Schools Chairman Roger Williams offered to assist with changes to the National Knight Essay Contest webpage. He also noted National is sending out youth program information via social media twice daily. They are also contacting teachers.
- Chairman Coggins clarified the top five winning essays become the property of the SAR and may not be submitted again for any other contest.
- Compatriot Christopher Smithson reported the at-large entries decreased this year. He received entries from only three State Societies.

Donations to the Knight Essay Contest Endowment Fund are always welcome and encouraged.

Chairman Coggins closed the meeting at 7:48pm.

Next Meeting:

The National Knight Essay Committee will meet via Zoom after March on a date and time to be announced.

Respectfully submitted,
Keith A Weissinger, MD
Vice-Chairman, National Knight Essay Contest Committee

Note: Thanks to Keith for taking the Minutes

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 5 Feb 2024

COMMITTEE NAME: ROTC/JROTC & Service Academies Chairman: COL Patrick J. Niemann, USA, ret.

Chairman's Address: 15 Timuquana Trl., Pinehurst, NC 28374

Chairman's Phone No. 813-784-1035

Meeting Dates & Location: _____

Teleconference Dates: _____

By Mail/E-Mail, Dates: Emails or phone calls as needed since last meeting.

REPORT & RECOMENDATIONS (*include progress on goals*):

Goals for 2023-2024

- 1: Increase from 25 entries to 30 or more for the JROTC Enhanced Program Award for the 2023-2024 year. Continue working with the State Society JROTC Points of Contact to achieve better results.
- 2: Secure additional funding for Service Academy endowment fund. Hopefully in the near future, the income from this fund will fully support both the Coast Guard Academy and Air Force Academy Award programs.

JROTC Enhanced Contest

The deadline for entries to be submitted for the JROTC Enhanced Contest is 1 May 2024. We had 25 state societies participate this year. The results of the 2023 contest are as follows for the top 5 state societies: 1st – FL, 2nd – AZ, 3rd – OK, 4th – UT, 5th – RI. The winner received her award at the Youth Awards Luncheon at the Orlando Congress.

JROTC Operating Fund balance as of 30 Nov 2023 (last SPOF report received) is \$14,832. We currently have no outstanding awards in the newly created SPOF Outstanding Scholarship account. Endowment Fund Distribution for 2023 earnings has been distributed.

JROTC Endowment Fund (last SPOF report received) The fund sits at \$207,854, which is after a 4% distribution deduction to the operating account for 2023.

Service Academies Awards Operating Fund balance as of 8 Aug 2023 (last SPOF report received) is \$1,805. Partial Endowment Fund Distribution for 2023 earnings has been distributed. A disbursement for the Air Force Academy award was \$750. The Air Force Academy required an increase from \$600 to \$750 to cover the awards presented there. The Rochester Chapter graciously volunteered to fund the annual award for the U.S. Merchant Marine Academy SAR Award in perpetuity. The award is named the Col. Peter K. Goebel Award to honor his memory.

Service Academies Awards Endowment Fund balance as of 30 November 2023 (last SPOF report received), is \$26,557, which is after the partial 4% distribution deduction to the operating account for 2023. Plans are to hopefully increase the Endowment Fund sufficiently to eventually fund the awards for the Naval Academy.

Donor Recognition At the Orlando Congress, three donors were recognized who made \$1,000 donations to the JROTC and Service Academy Award Endowment Funds. Brittany Austin from HQ has been extremely helpful in providing us with updated donor information during the past year.

For those compatriots that donate \$1,000 to either the JROTC or Service Academy Award endowment accounts, they will receive a JROTC donor medal, or the OLC award for their JROTC donor medal if they have already received the medal.

Respectfully submitted,

Patrick J. Niemann

COL Patrick J. Niemann, USA, ret.

Chairman, ROTC/JROTC & Service Academies Committee

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: January 22, 2024

COMMITTEE NAME: Rumbaugh Oration Committee Chairman: John H. Bredenfoerder
Chairman's Address: 8751 Haverhill Lane, Cincinnati, Ohio 45236 Chairman's Phone No. 513-324-9984
Meeting Dates & Location: 8/28/23 –
Zoom; 1/21/24 – Zoom

Teleconference Dates: 8/28/23 – Zoom; 1/21/24 – Zoom

Committee Communications by Mail or E-Mail, Dates 6/14, 6/15, 6/16, 6/18, 6/19, 6/20, 6/21, 6/23, 6/24, 6/25, 7/2, 7/3, 7/4, 7/5, 7/6, 7/9, 7/10, 7/11, 7/12, 7/13, 7/15, 7/17, 7/19, 7/23, 7/24, 7/27, 7/28, 7/31, 8/2, 8/3, 8/4, 8/7, 8/8, 8/11, 8/14, 8/16, 8/17, 8/18, 8/20, 8/21, 8/25, 8/26, 8/27, 8/28, 8/29, 8/30, 8/31, 9/6, 9/7, 9/10, 9/12, 9/13, 9/18, 9/19, 9/22, 9/27, 9/28, 10/2, 10/3, 10/4, 10/10, 10/15, 10/21, 11/4, 11/9, 11/11, 11/12, 11/14, 11/15, 11/16, 11/18, 11/20, 11/21, 11/22, 11/30, 12/2, 12/4, 12/6, 12/12, 12/13, 12/15, 12/26, 12/28, 1/03, 1/04, 1/05, 1/08, 1/09, 1/10, 1/11, 1/16, 1/18, 1/20, 1/21, 1/22

PROJECTED EXPENSES 2024:

\$150 fee for Oration Fundraising table at Congress.
\$200 Youth Luncheon for 1st place winner and family/chaperones
\$120 State Participant Streamers
\$1,200 Finalist Welcome Dinner
\$400 Misc and Shipping and Postage

TOTAL Itemized Expenses \$2,070.00

Student Awards TOTAL: \$20,500.00

First \$ 8,000.00

Second \$ 5,000.00

Third \$ 3,000.00

3 Finalist Awards @ \$500ea \$ 1,500.00

15 Other Participants @ \$200ea \$ 3,000.00

At-Large Contest Awards TOTAL: \$ 1,900.00

First \$ 300.00

2 \$50 Runner -up \$ 100.00

Finalist Travel (if needed) \$ 1,500.00

TOTAL AWARDS National: \$22,400.00

TOTAL PROJECTED 2024 EXPENSES: \$24,470.00

PARTICIPATION

In Person Meetings:

Attendance at Meetings:

Teleconferences:

8/15 - 2023 Fall Leadership:

J. Bredenfoerder (OH); D. Addington (NC); M. Atterson (OK); K. Carr (NM); S. Conrad (KS); C. Garnett (GA); T. Geimeier (KY); L. Hoffman (NC); B. Osborn (VA); S. Powell (NC); D. Schmidt (VA); B. Smith (KS); C. Smithson (MD); F. Templin (WA); J.M. Robertson (MO); R.A. Sauer (HQ)

1/21 - 2024 Spring Leadership:

J. Bredenfoerder (OH); D. Perkins (CT); V. Welkner (KS); M. Atterson (OK); T. Geimeier (KY); L. Hoffman (NC); R. Hoover (AZ); L. Jacobus (IN); L. Luby (TX); B. Osborn (VA); S. Powell (NC); D. Schmidt (VA);
B. Smith (KS); C. Smithson (MD); E. Spray (OH); F. Templin (WA); J.M. Robertson (MO); K. Young (OK)

REPORT & RECOMENDATIONS

2022-2023 GOALS (as submitted to David Perkins, Council of Youth Awards Chairman):

Short Term Goals:

- The Rumbaugh Committee Members will all complete the NSSAR Youth Protection Training - Continuing
- The Rumbaugh Committee was reminded of the contest financial responsibilities of the NSSAR and State Societies. (See the Rumbaugh Information Flyer on the NSSAR website) - Completed
- BES (2024-2029) Budget Worksheet was be submitted to Youth Awards Chair David Perkins
- The Rumbaugh Contest will continue to require mentions of the 250th Anniversary in the orations. (See posted contest videos from 2022 and 2023 on the NSSAR website)
- 2024 Streamers for Congress are ordered.
- The video of the 2023 winner was posted to the Rumbaugh Oration page of the NSSAR website shortly after the conclusion of Congress. Completed
- Committee requested that the information flyer expand the “no props or costumes” rule to include: no singing, no dancing, no lengthy quotes.
- Determine location of Finalist Welcome Reception by Spring Leadership.

Medium Term Goals:

- Continue to increase State Participation to 25. We had 18 contestants in 2023, an increase of +1 from 2022. Since only state contestants who qualify for the finals will travel to Congress, this will reduce individual state expenses considerably and could possibly encourage more participation.

Long Term Goals:

- Continue to develop sponsorship funding.
- Continue to drive to endowment goal of \$750,000

Respectfully submitted,

John H. Bredenfoerder

NSSAR Joseph S. Rumbaugh Historical Oration Chairman



8751 Haverhill Lane
Cincinnati, Ohio 45236
513-324-9984 cell

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 24 January 2024

COMMITTEE NAME: Youth Video Contest Task Force Chairman: Keith A Weissinger, MD

Chairman's Address: 7217 65th Ave West, Lakewood, WA 98499 Chairman's Phone No. (253) 224-4108

Meeting Dates & Location: 22 September 2023, Fall Leadership; 23 January 2024 via Zoom

Committee Members: Chairman Keith Weissinger (WA); Vice Chairman Troy Foxwell (DE); Secretary General Darryl Addington (TN); Council of Youth Programs Chairman David Perkins (CT); Jay DeLoach (NC); James Griffith (AL); Edgar Hoak (MA); James Kuykendall (TX); James Maples (AL); Lee Popham (FL); Samuel Powell (NC); Stephen Taylor (CT).

The meeting at Fall Leadership and the subsequent Zoom meeting focused on updates of the State Society pilot programs, future funding strategies, and pathways to a fully authorized National program.

Pilot program contests are currently active in multiple State Societies. We are happy to report additional State Societies have authorized and funded pilot video contests.

Several donations were made at Fall Leadership and the Operating Fund is currently \$4,850.00.

Lapel pins have been received from the manufacturer and we will begin full-scale advertising. The pins are available at the bronze level for \$100 and the silver level for \$250. Donations should be sent directly to Headquarters and designated to benefit the Youth Video Contest. Fundraising efforts will continue at Spring Leadership with a table offering items for sale and the raffle of a hand-made quilt.

Please contact the Chairman with your questions and offer of support.

Respectfully submitted,
Keith A Weissinger, MD
Chairman, Youth Video Contest Task Force
kweiss47@comcast.net



THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION

COMMITTEE REPORT

Filing Date: 5 February 2024

COMMITTEE NAME: Education

Chairman: Jim Griffith (AL)

Chairman's Address: 132 Oakhurst Drive, Madison, AL 35758

Phone No. (256) 656-8761

Meeting Dates & Location: 14 Sept. 2023 - Brainstorming session with Roger Williams, Jay DeLoach, Rae Ann Sauer, and Jim Griffith via Zoom. 5 Oct. 2023 - Brainstorming session with Roger Williams, Jay DeLoach, Jim Griffith, and Rae Ann Sauer via Zoom. 26 Oct 2023 - Brainstorming session with Roger Williams, Jay DeLoach, Jim Griffith, and Rae Ann Sauer via Zoom. 16 November 2023 – Education Committee Meeting via Zoom. 7 December 2023 - Brainstorming session with Roger Williams, Jay DeLoach, Jim Griffith, and Rae Ann Sauer via Zoom. 14 December 2024 - Brainstorming session with Roger Williams, Jay DeLoach, Jim Griffith, and Rae Ann Sauer via Zoom. 21 December 2024 - End of Year meeting to discuss finances via Zoom. 25 Jan. 2024 - Brainstorming session with Roger Williams, Jay DeLoach, Jim Griffith, and Rae Ann Sauer via Zoom. 29 January 2024 - Meeting to discuss Education Committee objectives mapping to 2035 Strategic Plan via Zoom. 31 January 2024 - Education Committee Meeting via Zoom. Had numerous subcommittee Zoom calls to begin planning and coordination, budgetary planning, roadmap definition, vision, mission, goals and objectives, scheduling, etc.

Zoom Dates: 14 Sept. 2023; 5 Oct. 2023; 26 Oct 2023; 16 November 2023; 7 December 2023; 14 December 2023; 21 December 2023; 25 January 2024; 29 January 2024; 31 January 2024

Numerous calls with Drew Hight to discuss advertising initiatives.

Numerous calls with Rae Ann Sauer, Jay DeLoach, Brooks Lyles, Roger Williams, Jack Bredenfoerder, George Strunk, Greg Lucas, and Howard Fisk to discuss Education Committee plans, objectives, challenges, and the path forward.

Committee Communications by Mail or E-Mail, Dates: Jay DeLoach, Roger Williams, Gregory Lucas, George Strunk, Jack Bredenfoeder, Rae Ann Sauer, Megan Krebs, Drew Hight, and Brooks Lyles through various means, times, and dates. These discussions have included coordination of Education Committee tasks, subcommittee activities, brainstorming sessions, training standards, budget dollars remaining in the calendar year, advertising needs and results, technologies. Have also participated in numerous calls with the Revolutionary War Education Forum on branding, scheduling, and technology. This has included further discussions on the drag and drop technologies utilized to build the app for SAR and the possible utilization of this same technology within the Forum. Have also participated in a call with Arizona State University professor Dr. Retha Hill around a creation of hers entitled the "Museum of Revolutionary Ordinaries". This is a completely virtual museum where you can create an avatar then virtually walk around the museum, look at paintings, and then touch the painting to hear that individual speak. This is an incredible technology and one which I believe has a tremendous future in what online education means.

EXPENSES: The Education Committee carefully spent down their appropriated dollars over 2023 with a heavy emphasis on technology, outreach/public relations, and marketing. This included paying for attendance at several trade shows in 2023 and 2024, purchasing technology utilized for the podcast, tradeshow giveaways, and travel expenses incurred by several individuals attending the trade shows.

Education Domain Committee Members: **Chairman** Jim Griffith (AL); **Vice Chairman** Jay DeLoach (NC); **EX OFFICIO Hist Gen** Brooks Lyles (NC); **Secretary** Dr Rudy Byrd (AZ); **Budget** David Bussone (FL); **Marketing** Mickey McGuire (MI); **Advisor, Non-Voting** Dr Matthew Barlow (DE); **Lib Gen** Fred Olive (AL); Mark Anthony (GA); Skip

Cox (CA); Guy Higgins (IT); Scott Giltner (KY); Jeff Thomas (VA); Jacob Vink (IN); Drake Peddie (TX); Bill Daniel (AL); Howard Fisk (MO). **Committee Chairs:** SAR Center - Rae Ann Sauer (HQ); Education Outreach and Schools - Roger Williams (NJ) **Chair** and W Snodgrass (CO) **Vice Chair**; Officer Training – Greg Lucas (WA) **Chair**, Jack Bredenfoerder (OH) **Vice-Chair** (Chapter and State Officer Training); George Strunk (NC) **Vice Chair** (VPG Training); Compatriot Training – Jay DeLoach (NC) **Chair** and Bob Anderson (AL) **Vice Chair**

Other Service (specify): The Education Committee has begun to restructure our Committee Objectives to be consistent with the SAR 2035 Strategic Plan. This effort is ongoing but should be nearing completion around Spring Leadership of this year.

2023-24 GOALS: Goals of the Education Committee: All Goals detailed in previous reports remain in effect. The new goals and objectives of the restructured committee support the current Education Committee mission and the mission of the National Organization and can be found in the individual subcommittee reports which are included in the Committee Report Annexes of prior Leadership Report Books.

The Education Committee Vision is to use Education Outreach to perpetuate knowledge of our founding documents and stories of patriotism, courage, sacrifice, tragedy, and triumph of the patriots who achieved the independence of the American people. Furthermore, to strengthen our fellow compatriots' knowledge of SAR goals and objectives, programs, and operations through our training programs so that the evolution of SAR will be based on informed decisions, thereby driving member enthusiasm, participation, growth, and influence of SAR and its impact upon the defense of our freedoms contained in those original documents.

1. To meet the President General's intent to leverage the opportunities available in the ongoing 250th Anniversary of the founding of our country and to comply with SAR 2026 the Five-year Operational Plan published by the Strategic Planning Committee and approved by ExCom last Spring, the Education Committee has developed focused five-year plans that include Objectives, Action Items, timelines, and resources required. We have identified the resources required and have developed our own fund-raising means to be self-sufficient, to a point. We have one of the most important committees in the organization and one tied directly to our 1906 Congressional Charter. It is incumbent on each of us to do our utmost to train our compatriot and officer corps at the chapter, society, and national levels on what membership in the SAR means and what our responsibilities to educate the public, both in schools and in our communities, are. Our subordinate committees are tasked with these missions, but it will take all our membership to make it happen.
2. To expose a younger generation to SAR, the American Revolution, and our Founding Fathers and patriots by utilizing technologies where that demographic is heavily engaged.
3. To grow our education influence by establishing a top-down and bottom-up "go to market" strategy. Top-down would be establishing bulk relationships through the Society of Social Studies Conferences. Bottom-up would be through the establishment of Education Coordinators within each state society and local chapter.
4. To establish member and officer training programs at all levels of SAR including local, state, and national, with the intent of creating SAR experts throughout our entire membership.

5. Contact your society president to request assignment to either the National Education Committee or to your State Society Education Committee. Education is our responsibility, and it starts with you!

Committee Reports/Actions:

6. Education Center & Museum (Sauer): See Annex A

- a. Outreach Education has begun a major marketing effort by attending trade shows and conferences around the country. Likewise, they continue to expand resources and materials available to SAR members, students, teachers, and the public. Collaboration continues with other historical organizations as part of the American Revolution Education forum in preparation for the 250th. In addition, the SAR Collections continue to grow with the Artifact Donor program and remains a teaching tool through the "Selections from the Collections" series of articles, videos, and live events. The latest episode of "Selections from the Collections" had 4,300 views in 12 days.
- b. Outreach Education newsletter is now available and is distributed to a rapidly growing list of educators around the country.

7. Education Outreach and Schools: (Williams/Snodgrass): See Annex B

- a. Chairman Roger Williams has begun pushing for Education Coordinators to be appointed in every state. This is an ongoing effort as all states have not complied with this requirement at this point.
- b. Chairman Roger Williams and Education Director Rae Ann Sauer have met with the Herzog Foundation which funds and manages hundreds of Christian K-12 Schools. Youth Program materials have been distributed to all Herzog Foundation partners.
- c. An initial website review was performed on state society websites. Each website was "graded" and recommendations were sent. More information can be found in the Annex B attachment to this report.

8. General Officer Training (Lucas): See Annex C

- a. New training initiatives include "Top-Down Communications" and "Leadership Development" with initial presentations to be offered at Spring 2024 Leadership.

9. Officer Training (Bredenfoerder/Kaplan): See Annex D

- a. Extensive Officer Training plans have been developed along with a timeline for implementation at all levels of local chapter and state society officers.
- b. Have decided to develop common training modules that will map into specific officer training. So, initial training for an officer would be high-level, but common training modules such as Leadership, etc... would be included in the syllabus for that particular officer position.
- c. VPG Training has been created by George Strunk. Initial video anticipated to be available for review at Spring Leadership by the Education Committee and the CoSP.

10. Member Training (DeLoach/Anderson): See Annex E

- a. 14 draft scripts for YPT Training have been submitted and are under review. A draft video is being created for presentation to the Education Committee at Spring Leadership 2024.
- b. Learning Management Systems are being reviewed with the hope of implementation at some point in the not too distant future. More information can be found in the attached Annex E.

Ongoing Programs/Education Initiatives:

11. **YPT Training** – Member Training Committee has created 14 initial draft scripts for inclusion in a YPT training video. Anticipated initial release of a training video to the **Education Committee only** is scheduled for Spring 2024 Leadership.

12. **The NSSAR Youth Education Recognition Program** - All approved changes to the current Youth Education Awards Program including the new medals were approved and submitted to the Handbook Committee and updated in Volume 6 of the Handbook effective 1 June 23. All winners of the PG’s Education Outreach Streamer and the Ohanesian History Presentation Awards are derived from Americanism Reports submitted by chapters and states eliminating any redundant reporting requirements and encouraging more states and chapters to fill out the annual Americanism reports.
 - a. **Youth Education Medal**
 - b. **Youth Education Medal with Lifetime Achievement Bar**
 - c. **The President General’s Education Outreach Streamer**
 - d. **The Ohanesian Family History Presentation Awards**

13. **Education 250th Coin** – These coins were paid for by National and are available at \$5 each in merchandise.

14. **Speaking Out About History** –
 - a. In November, “Speaking Out About History” released an episode with Benjamin L. Carp. Another episode featuring author Tom Hand was released in December of 2023. All “Speaking Out About History” videos are available on the Education website and the SAR YouTube channel.

15. **The Revolutionary War Education Forum** –
 - a. The SAR has become a critical participant in the Revolutionary War Education Forum and has used this platform to establish and build “industry-wide” relationships with organizations of a kindred-spirit including Colonial Williamsburg, Battlefield Trust, College of William and Mary, Museum of the American Revolution, The Mount Vernon Ladies Association, Values Through History, the James Madison Memorial Fellowship Foundation, The National Park Service, American Village, The Bill of Rights Institute, The DAR, and many others.
 - b. Our representatives have been Historian General Brooks Lyles, Education Director Rae Ann Sauer, and Chairman Jim Griffith. Roger Williams will be joining us as a representative for SAR at the March meeting. The next “in-person” session will be on March 27th at SAR HQ in Louisville. We will be hosting a welcome reception the evening of March 26th, then an all- day meeting at the Library on March 27th.
 - c. This group provides an incredible opportunity to collaborate with all American Revolution history organizations, and much collaboration will be required.

16. **The Revolutionary War Rarities Podcast** – Jim Griffith (AL)
 - a. Season 2 is over halfway complete, and growth has been significant. We are now averaging well over 800 views per episode. For reference purposes, we were averaging 400 views per episode in

January of 2023, so that is 100% growth in views over the last year. We have released a total of 47 videos and 44 episodes. We have almost 1,100 subscribers on YouTube, 1,180 members of our Facebook Group, and a growing presence on Instagram.

- b. As of February 4, 2024, *Revolutionary War Rarities* has a total number of views and listens quickly approaching 36,000. *Revolutionary War Rarities* has been seen or heard in every State except Alaska. It has been seen or heard on every continent except Antarctica, and has been seen or heard in the following countries: US, Canada, Portugal, Poland, United Kingdom, Norway, France, Saudi Arabia, Aruba, Thailand, Netherlands, Pakistan, Austria, Brazil, Switzerland, Honduras, Ireland, Kenya, South Korea, Mexico, Malaysia, Romania, Russia, Germany, India, Sweden, Slovenia, Columbia, Spain, Hungary, Italy, Cayman Islands, and South Africa.

17. **The Education Outreach App** – Jim Griffith (AL)

- a. If you have an Android or Apple phone, you are in luck. The SAR Education Outreach app is available right now in the App Store for either platform.
- b. This app will give you access to all the items on the education/sar.org website to include “Key Holes to History”, RWR Videos, “Speaking Out About History” interviews, Education Resources, links to other organization sites, and more. This app will continue to grow with additional development resources brought to bear by Roger Williams. He now has online access to the development tool and can make modifications to the app as well.

18. **Partnering Opportunities for the SAR**

- a. **Redhill Town Films** – Redhill Town Films recently filmed a pilot for a series entitled *An Appeal To Heaven*. The owner of Redhill Town Films contacted the Alabama SAR for extras along with period clothing, muskets, etc. The pilot will be used to market this series to the History Channel, the Discovery Channel, etc. The pilot should be out in October of 2023 and will be about 15 minutes long, but is intended to introduce these organizations to a series which will be produced if the interest is generated by the pilot. Filming with SAR personnel occurred over a 2-day period throughout the night.
- b. **The American Friends of Lafayette (AFL)** – The SAR is partnering with the AFL and has sponsored a set of 6 pop-up banners chronicling the life and accomplishments of the Marquis de Lafayette in preparation for the Bicentennial Celebration of his 1824 visit to the United States. SAR chapters will be able to sign up for the use of these banners for setting up temporary displays, and we will be looking at additional ways of partnering with the AFL during this exciting period. The banners were on display in the Education Outreach room at Congress and will be on display at Fall Leadership. There is a great opportunity for SAR chapters and color guards to work with the AFL during the 2024-2025 Celebration of Lafayette’s return to America and his visit to each of the 24 States on the 1824-1825 tour.
- c. **The Legacy Marker Program** – Eugene Hough (PA) ehoughlegacymarker@gmail.com - Gene Hough is involved in a program that is looking at conducting two restoration or preservation projects on historic sites in each of the original 13 colonies, while making a series of PBS-like documentaries of the process. Gene works with at-risk teenagers and veterans teaching them preservation techniques and educating them about the significance of the historical sites or markers they are working to preserve. He is looking for points of contact in each of those original 13 states and would consider expanding to other locations of significant historic importance like Florida, Tennessee, Kentucky, and Indiana if there is work to be done. Gene joined the Color Guard at the Camden Burial Ceremony in

April, is working with the SC and DE Societies on local projects, and will be the Historian General Seminar's Speaker at the 2024 Congress in Lancaster, PA.

- d. **Arizona State University** – Professor Retha Hill has created an amazing virtual museum entitled the “Museum of Revolutionary Ordinaries”. She is looking for partnering opportunities, funding opportunities, and ultimately hoping to complete this virtual museum. There are tremendous opportunities for this technology and how SAR might be able to use it.
- e. **Revolutionary War Education Forum** – With members from all over the United States, this organization gives the SAR the opportunity to meet and join forces with the most known and important American Revolution organizations in the world. The possibilities associated with these relationships currently being established are endless.

19. Ongoing NSSAR Education Activities in Support of the Museum:

- a. Director of The SAR Education Center, Rae Ann Sauer, and the Education and Museum staff continue to be busy with the collection, inspection, cataloging and preservation of artifacts for the Museum.
- b. Articles on featured artifacts are a recurring item in *SAR Magazine* and *Colorguardsman E- Magazine*, and those artifacts can be found on the Education website.
- c. Opportunities to sponsor the acquisition of artifacts for the museum are out there. Museum Board Chairman Kent Gregory has a list of items available for acquisition and sponsorship. Check with NSSAR Director of Collections Zac Distel, or Kent Gregory for more information. There is also a PowerPoint presentation available on the Artifact Donation Program that you can use in your local chapter or society meetings.
- d. “Selections from the Collections” video series is taking off. The last episode released on the Pomeroy Fowler has had 4,300 views in 12 days. That is a dramatic and encouraging increase in viewership!
- e. Education Committee has begun reviewing other Education Centers with the intent of defining ours. More information can be found in this report about this particular effort.

20. Learning Management System

- a. As we continue to produce more and more internal training materials, it will be critical to implement a Learning Management System. We have begun reviewing available LMS solutions in hopes of taking that next step once we have sufficient education content to justify its implementation.

21. Education Marketing Effort

- a. The Education Committee has executed a series of ads over the 4th quarter of last year and into the first couple of weeks of 2024. This initiative had multiple objectives including the increase of traffic to education.sar.org and fastfunhistory.com, growing of the email distribution list for the Education Department newsletter, and expansion of the *Revolutionary War Rarities* podcast consumption. Each of the ads proved to be successful as all of these objectives were met during that time. Now we have to determine how best to utilize advertising funds in the new year, and that effort is ongoing.

New Education Opportunities and Initiatives:

22. Conference Attendance

- a. SAR has attended numerous conferences/trade shows where we have met teachers from all over the nation. These conferences have provided SAR an opportunity to meet countless Social Studies and History teachers and have enabled us to distribute our message and our resources to those in attendance. We have attended the National Council of Social Studies conference, and are currently

scheduled to attend NCSS in 2024, National Council for History Education, and the Florida Homeschool Convention. Each conference attended dramatically increases our email subscription base and therefore our ability to increase consumption of our education focus and materials.

23. Education Center

- a. The Education Committee has begun to review numerous Education Centers with the objective of recommending the definition of the SAR Education Center. The goal is to define this in a multi-phased approach to include virtual and physical aspects of an Education Center. This definition will likely include virtual classrooms, virtual content, collaborative integration with other organizations of a kindred spirit, video production, online content, integration with the Library and with the museum, scheduled trivia competitions, scheduled American Revolution courses, outreach to public, private, and home schools. One of the biggest issues that we face with this effort is education content. Not only do we have to consider what we should be building but what we are going to present when the Education Center is complete.

24. Education Website Restructuring

- a. The Education Committee has begun discussing the possibility of restructuring the education.sar.org website. This effort and these discussions are just beginning so there is a long way to go before any decision is made to modify or not modify the website.

Let us know what you are doing out there Education-wise in your communities and what your secrets for success are! We can all learn from each other and there is no reason what works for you can't work somewhere else! We are all stronger and more effective working together!

25. Chairman's Final Comments: The Education Committee is working hard to increase SAR's exposure and impact in education all across the United States. The Education Committee is also working hard to ensure that our own members are properly trained and therefore better prepared to have a positive impact on the goals and objectives of SAR. At the moment, there are so many tasks requiring action that there is a bit of chaos that we must overcome. But we are working to check off as many tasks as possible and to establish working groups that will take responsibility for the larger tasks that remain outstanding. So, we plan to divide and conquer in order to regain some organization and ensure progress. To those members who believe they can contribute to these goals and objectives; to those members who want to have a significant impact on future generations; to those members who are willing to work hard and help us drive these goals and objectives to success, we welcome you. Please do not hesitate to reach out to me if you feel you can contribute positively to what we are doing. It is on the backs of our members that our successes depend.

So, join us as we continue to expand our patriotic, historic, and educational impact on our nation. We are thankful to call you a compatriot.

Respectfully Submitted: *James K. Griffith, Jr.* Chairman, Education Committee

Attachments:

- Annex A – Outreach Education Staff Report
- Annex B – Education and Schools Outreach Committee
- Annex C – General Officer Training Committee
- Annex D – Local and State Officer Training Committee
- Annex E – Member Training Committee



Spring 2024 Leadership Meeting Outreach Education Highlights

Outreach Education continues to expand its resources and materials available to SAR members, students, teachers, and the public. Collaboration continues with other historical organizations as part of the American Revolution Education Forum in preparation for the 250th, and the SAR will host the forum's spring meeting March 26-27. In addition, the SAR Collection continues to grow with the Artifact Donor Program and remains a teaching tool through the *Selections from the Collections* series of articles, videos, and live events.

Engaging Students and the Public Outside of the Classroom

Student and public programming continues with the HQ staff. In November, Outreach Education and the SAR Library joined forces to host a *Be a Book Artist* patch program for local Girl Scouts. Three additional programs are scheduled for 2024.

HQ staff is in the process of planning a community Flag Day celebration for June 14. This celebration will include a flag retirement ceremony, kid's craft, refreshments, and more.

Outreach Education is working with Evolve502 to provide after-school enrichment programming at local community centers.

Preparation is underway for summer camp and public library programs.

Outreach Education Website

Recent additions to the Outreach Education website feature the successful program, *Speaking Out About History*. In November, Benjamin L. Carp discussed his books *The Great New York Fire of 1776* and *Defiance of Patriots: The Boston Tea Party and the Making of America*. In December, Tom Hand discussed his book *An American Triumph*. Members were encouraged to submit questions to the authors, and a few were chosen to win a copy of the book. A new episode will be available this Spring.

Fifteen new *Keyholes to History* are being released on the website January-May. Topics from Silas Deane to West Point and Judith Sargent Murray are addressed.

SAR Museum Collection Artifact Donor Program

The Artifact Donor Program continues to garner significant artifacts related to the American Revolution for the SAR Collection. The following are some of the artifacts acquired since Fall Leadership: a short saber that belonged to Capt. Simon Marston of New Hampshire; a very rare 1795 St. Vincent's Black Corps Medal; and a 1780 U.S. Loan Office certificate signed by Francis

Hopkinson.

The Curator has identified selected historic artifacts that are available for purchase for the *SAR Museum Collection*. A list of available artifacts can be found on the Museum tab on **www.sar.org**.

Selections from the Collection

Outreach Education continues to contribute regular entries of *Selections from the Collection* to the *SAR Magazine* and is expanding *Selections* to more platforms. *Selections from the Collection* videos featuring artifacts from the SAR Collection are now being regularly released by the Manager of Marketing. In addition, the Outreach Education team has begun live online *Selections from the Collection* which gives members the opportunity to interact with the Curator while reviewing artifacts featured in the *SAR Magazine* articles. The next live virtual event is scheduled for April 17 at 12:30 PM Eastern.

SAR Collections Care/Administration

A collaborative effort between Museum Board Collections Management Subcommittee and staff is working to develop a disaster preparedness plan for the SAR.

SAR Outreach Attending National Conferences

The Outreach Education staff as well as Education Committee members have been promoting the SAR's educational resources at national conferences. In December, staff and Education Committee members hosted a booth at the National Council for the Social Studies Conference in Nashville. Contact was made with many educators and over 300 contacts were added to our distribution list. Since reaching out to them post-conference, we have received several inquiries on classroom presentations. In March, members of the Ohio Society will be exhibiting at the National Council for History Educators Conference in Cleveland. These are great opportunities for the SAR to reach new audiences and make connections in the field.

Outreach Education Newsletter Now Available

This quarterly newsletter is geared towards educators and outlines new or seasonal educational materials created by the SAR for teachers, students, and the public. The distribution list is at 1000 and growing. If you would like to be added to the mailing list, please email rsauer@sar.org.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
SUBCOMMITTEE REPORT

Filing Date: January 31, 2024

COMMITTEE NAME: EDUCATION & SCHOOLS OUTREACH (ESOS)

Chairman: Roger S. Williams

Chairman's Address: 17 Paddock Dr. Maidenhead, NJ 08648

Chairman's Phone No. (609)389-5657

Meeting Dates & Location: _____

Teleconference (Zoom) Dates: Feb 5

Committee Communications by Mail or E-Mail, Dates: Since Congress - Aug 1, 3, 16, 21, 22, 24, 26, 29, 30, Jan 22, Feb 5.

EXPENSES: N/A; opening operations budget of \$3,000

PARTICIPATION at prior meetings: **R Williams**, Chair (NJ); **W Snodgrass**, Vice Chair (CO); **R Reese** (GA); **R Smith** (FL); **B Hulse** (KS); **L Wilkerson** (OH); **V Lemmer** (WA); **J Eitner** (NJ); **L Stevens** (TX); **L Raborg** (MD); **R Grover** (MO); **S Hart** (WV); **T Jackson** (TX); **V Welkner** (KS)

Attendance at prior meetings: **B Lyles** Hist Gen (SC); **J Griffith**, Edu Chair (AL); **J DeLoach** Vice Chair, Edu (NC); **RA Sauer** Dir. Edu.

REPORT & RECOMMENDATIONS (*include progress on goals*):

September – A campaign was initiated to have State Presidents send the names of their assigned State Education Chair to the subcommittee. As of this writing, only ten (10) state societies have complied. At Fall Leadership, Education Chair **Jim Griffith** and Schools Outreach Chair, **Roger Williams** will lobby State Presidents. Until such time, State Education Chairs are assigned Education Committee News, will be sent to State Secretaries.

In October, Dir. of Education **Rae Ann Sauer** and Subcommittee Chair **Roger Williams**, attended a Zoom meeting with Herzog Foundation's President **Darrell Jones**. Herzog Foundation (<https://herzogfoundation.com>) is a consulting group that funds and manages hundreds of Christian K-12 schools and provides resources with homeschoolers. In December, information on the SAR Youth Programs was sent to all the Herzog Foundation partners.

In October, Education Outreach Subcommittee Vice Chair **Wayne Snodgrass** completed a survey to identify the current roster of Patriot Chest Presenters. There are currently ten (10) state societies that have presenters listed. A message will be sent to the State Education Chairs about the Patriot Chest Program to encourage more presenters to consider Patriot Chest.

November – Edu Outreach completed an analysis of state society websites, grading each website on content, accessibility, and outreach functions. A list of state society sites that deploy "Best Practices" along with recommendations was sent to the VPGs.

Sauer, Committee member **Lee Wilkerson**, and **Williams** attended the National Conference for the Social Studies, Nashville, Dec 1 & 2. Collected 315 names for the Education.SAR.org mailing list and several membership prospects. In December, **Sauer** sent a mailing to the entire Education.SAR.org mailing list of about 1,000 subscribers.

In January, a personalized letter was sent to all 315 names with bulleted SAR Youth Education and Education Committee Programs and Initiatives reminders.

In January, **Williams** arranged to include a new column in the *SAR Magazine* called "Education Corner". "Education Corner" will alert membership on SAR Youth Education and Education Committee Programs and Initiatives.

DATED the 31st of January 2024.

Respectfully submitted,
EDUCATION & SCHOOLS OUTREACH SUBCOMMITTEE

By: _____
Roger S. Williams, Chair

cc: **Brooks Lyles**, Historian General, **Jay DeLoach**, Vice Chair, **Jim Griffith**, Education Committee Chair, **Wayne Snodgrass**, ESOS Vice Chair

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT
Filing Date: January 30, 2024

COMMITTEE NAME: OFFICER TRAINING COMMITTEE

Chairman: Gregory D. Lucas

Chairman's Address: PO Box 1931, Bellevue, WA 98009

Chairman's Phone No. (425) 454-3302

Meeting Dates & Location: 19 January 2024 (Zoom)

Teleconference Dates: _____

Committee Communications by Mail or E-Mail, Dates: 10/19/2023; 10/20/2023; 12/03/2023; 01/16/2024; 01/17/2024; 01/18/2024; 01/19/2024; 01/20/2024; 01/22/2024.

EXPENSES: N/A; the Committee anticipates accomplishing its mission on a neutral cost basis.

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

G. Lucas, Chair (WA); J. Bredenfoerder, Vice Chair (OH); G. Strunk, Vice Chair (NC); T. Lyles (NC); D. Bussone (FL); C. Hardison (TN); S. Kaplan (OH); D. Shaul (MO); P. Wesolosky (KY).

Attendance at Meetings: G. Lucas, Chair (WA); J. Bredenfoerder (OH); G. Strunk (NC); S. Kaplan (OH); C. Hardison (TN).

Teleconferences:

REPORT & RECOMENDATIONS (*include progress on goals*):

The Committee evaluated its original training curriculum, to determine the areas in which more training is required. In particular, the Committee identified two major areas in which upper-level training work would be beneficial.

(a) The first related to “top-down” communications. Our Society does reasonably well at obtaining bottom-up information. The reverse is often not the case. The Committee discussed related issues with the goal of developing appropriate training to meet that need.

(b) The original charter of the Committee was to engage in Officer Training and Leadership Development for upper echelon general officers and Trustees. It was apparent, by virtue of the poor attendance by general officers, and the significant attendance by Trustees, that Trustees valued the training, and general officers considered it to be irrelevant. The overall lack of understanding by general officers of the programs developed by this Committee suggest that high-level training and leadership development would be beneficial. To that end, the Committee is working to develop compelling leadership development programs that will be of greater interest to general officers. The first of those programs will be offered at Spring Leadership.

DATED the 30th day of January, 2024.

Respectfully submitted,
OFFICER TRAINING SUB-COMMITTEE:

/s/

By: _____
Gregory D. Lucas, Chair

- cc: J. Bredenfoerder, Vice Chair (OH);
G. Strunk, Vice Chair (NC);
T. Lyles (NC);
C. Hardison (TN);
S. Kaplan (OH);
D. Shaul (MO);
P. Wesolosky (KY)

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: January 22, 2023

COMMITTEE NAME: Officer Training Subcommittee Vice Chairman/Chairman: John H. Bredenfoerder
Chairman's Address: 8751 Haverhill Lane, Cincinnati, OH 45236 Chairman's Phone No. 513-324-998
Meeting Dates & Location: _____

Teleconference Dates: 8/21/23 – Zoom, 1/11/24 – Zoom, 1/19/24 – Zoom

Committee Communications by Mail or E-Mail, Dates 8/16, 8/20, 8/21, 8/22, 8/27, 8/28, 9/20, 10/1, 10/13, 10/30, 10/31, 11/1, 11/13, 11/14, 11/15, 11/16, 12/19, 12/21, 1/9, 1/10, 1/12, 1/16, 1/20

PROJECTED EXPENSES 2024:

\$500 miscellaneous and funds to acquire stock images or other creative material if needed. Expenses to be reviewed and approved by the Education Committee Chairman.

PARTICIPATION

In Person Meetings:

Attendance at Meetings:

Teleconferences:

8/21/23:

J. Bredenfoerder (OH); S. Kaplan (OH); J. Griffith (AL); J. DeLoach (NC)

1/11/24:

J. Bredenfoerder (OH); S. Kaplan (OH); J. Griffith (AL); J. DeLoach (NC)

1/19/24:

G. Lucas (WA); J. Bredenfoerder (OH); S. Kaplan (OH); G. Strunk (NC); C. Hardison (TN)

REPORT & RECOMENDATIONS

2023-2026 GOALS

Mission of the Officer Training Committee: Provide the tools and knowledge to give chapter and state officers a practical understanding of their roles and responsibilities, enabling them to develop and lead successful teams.

2023-2024 goal: Provide training modules for chapter officers.

2024-2025 goal: Provide training modules for state society officers.

2025-2026 goal: Provide training modules for committee chairmen (chapter and society).

2023-2024 Action steps and timeline:

- a. Develop basic PowerPoint for the President’s module to share with Education Committee Leadership by 10/31/23 – September through October 2023
- b. Recruit additional committee members from key societies with key leadership experience – September through November 2023.
- c. Approval/adjustment of module and its format by 12/1/23 – November 2023.
- d. Continue to refine topics for other chapter offices during President’s module review in November.
- e. Develop content for each officer module, September–November 2023.
- f. Production of modules – December 2023 through February 2024.
- g. Present PowerPoint officer modules to CoSP for review at Spring 2024 Leadership.

- h. At Leadership, provide module download links so that states may review and provide feedback by April 1.
- i. Convert PowerPoint modules to “SAR University” video modules – April 2024 through June 2024.
- j. Present video modules at 2024 Congress.

Evolving Plan: Produce a series of PowerPoint modules followed by a series of refined video modules in the 10-12-minute range with lots of visual impact, using original photos, videos, and bullet points. When possible, the modules should include links to resources. Accompanying PDF handouts should be available to be printed. Modules should be enthusiastic and focused on practical information on how officers can apply the lessons learned.

PROPOSED MODULES

In January 2024, the committee decided to continue with the officer-specific PowerPoint modules for presentation at Spring Leadership but have decided to develop a “SAR University Format” for the video module production. The SAR University video format will have brief Officer Overview modules that will contain a curriculum of skill set modules that will need to be completed. This will allow certain skill sets to be repeated for each office. For example, a communications module could prove valuable for several different officers or committee chairmen.

- Chapter Leadership
 - General leadership training module
(what it means to be a leader, being a leader of volunteers, motivation, individuality, leadership development, recognition of members, comradery of compatriots)
- Chapter President
 - Planning (annual retreat, alignment of Executive Committee, Committee Chairmen, members)
 - Defining Chapter’s Mission in relation to the NSSAR Mission
 - Defining and Prioritizing Measurable Goals
 - Short Term
 - Long Term
 - Develop Action Plans and Assign Ownership
 - Develop and present an annual budget with cooperation of chapter treasurer.
 - Assure that all required chapter operational filings are made to government, society, and NSSAR
 - Maintain and update annual calendar.
 - Progress Reviews
 - Presiding over meetings (Robert’s Rules, agendas, programs)
 - Member engagement (induction, orientation, involvement, committee, activities, recognition and development)
 - Chapter activities (youth contests; chapter SAR speaker programs; other community programs; service, awards; educational presentations and speakers for chapter meetings; veterans’ recognition activities; grave markings, Color Guard)
 - Community Outreach (DAR, C.A.R. partners; other aligned organizations (military, historical, educational, patriotic); community leaders; media; community service)
 - Being the chapter spokesperson - external and internal
 - Reporting chapter activities
 - To the NSSAR (Americanism, Stark, other award applications)
 - To chapter members and state society and other stakeholders
 - To community leaders
 - Other to be determined.
- Chapter Vice President(s)
 - How different chapters may define the roles of the Vice President(s)
 - Possible roles of the Vice President(s)

- Support of President.
 - Training to be President.
 - Leadership development (identify, motivate, train, develop, succession)
 - Member recruitment (chapter brochure/posters, elevator speech, releases)
 - Overseeing Committees
 - Social Media (website, various platforms, like/share/follow)
 - Other to be determined.
- Chapter Secretary(s)
 - Secretarial duties (recording minutes, supplies, record keeping)
 - Communications (correspondences, chapter newsletter, e-mails)
 - Other to be determined.
- Chapter Treasurer
 - Keeps accurate and up-to-date ledger of chapter's financial activities.
 - Reconciles the chapter books monthly with chapter banking statements.
 - Is a member of or chairs the chapter Finance Committee, Fundraising Committee, Investment Committee, other
 - Prepares a chapter annual report at the close of each fiscal year.
 - Presents all financial records and annual report to the Chapter Audit Committee
 - Prepares chapter financial reports for each chapter meeting.
 - Legal status (501c3 status, IRS, state's attorney filing, others)
 - Reconciliation report (life members, junior members, etc, reporting)
 - Assists the president or president-elect with preparing the annual budget.
 - Monitors chapter spending and alerts the chapter EXCOM of any significant deviations from the annual budget.
 - Other to be determined.
- Chapter Registrar / Genealogist
 - Registrar duties (assist applications - summary of available course)
 - Other to be determined.
- Chapter Chaplain
 - Best practices for chaplains (duties, nondenominational guidelines)
 - Other to be determined.
- Chapter Historian
 - Historian's duties (duties, procedures, what-to-save)
 - Other to be determined.

Respectfully submitted,
John H. Bredenfoerder
Vice Chairman NSSAR Education Committee
NSSAR Officer Training Chairman
8751 Haverhill Lane
Cincinnati, Ohio 45236
513-324-9984 cell

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: January 30, 2024

COMMITTEE NAME: Member Training Committee Chairman: J. DeLoach (NC)

Chairman's Address: 2902 Neuse River Drive, New Bern NC 28560 Chairman's Phone No. (703)-501-7205

Meeting Dates & Location: Zoom on January 30, 2024

Teleconference Dates: _____

Committee Communications by Mail or E-Mail, Dates: _____

EXPENSES: _____

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)":

Attendance at Meetings:

8/21/2023 Committee Meeting via Zoom: J. DeLoach (NC); J. Griffith (AL); B. Lyles (NC); S. Hohman (FL); C. Loveland (VA); C. Moberg (MN); and B. Stephens (CA).

REPORT & RECOMENDATIONS (*include progress on goals*):

Goals: The goal of the committee is to write and produce video training modules for SAR members.

Committee Chairman Jay DeLoach called the meeting to order at 7:05 pm. This meeting covered (1) update to the Youth Protection Training (YPT); (2) development of a basic training standard for video training modules; and (3) Learning Management System (LMS).

(1) Updating YPT: With the release of the new SAR Youth Protection Policy (YPP), the committee is tasked with updating the Youth Protection Training (YPT) module on the eLearning menu. Members have prepared and submitted the following draft scripts:

1. YPT Introduction – Jim Kuykendall
2. Overview and Policy – Steve Hohman
3. Application Screening – Brian Stephens
4. YPT and Ongoing Education - Carl Loveland
5. YPT Awareness and Maintenance – Steve Hohman
6. Screening and Selection of Volunteers – Steve Hohman
7. General YPT Guidelines and Rules – Stephen Taylor
8. Open Doors – Brian Stephens
9. 2 Adult Rules - Brian Stephens
10. Bathrooms – Chris Moberg
11. Behaviors – Chris Moberg
12. Injuries – Brian Stephens
13. Publication of Photos and Information – Bob Anderson
14. Reporting – Bob Anderson

The next step will be to produce a draft video with questions to demonstrate a clip to the Education Committee at Spring Leadership and then later to the Council of State Presidents during the 2024 National Congress. These preliminary viewings will allow us to obtain constructive feedback before seeking approval to replace the existing YPT on the SAR website.

(2) Training Standard: The committee discussed an in-depth approach to creating a training standard, but it was determined that we are not a professional training development company that can produce training videos to an industry standard. Therefore, it was determined that what we really need at this stage is a standardized introduction and ending that will brand our video modules. The introduction should also be short, approximately 20 seconds long. Steve Hohman will tackle the development of a standardized introduction and ending.

(3) Learning Management System (LMS): A LMS software package is needed where all SAR training modules would reside, allowing the recording and tracking of test completion, analysis of test results, and sending of annual renewal notices. Several LMS packages were explored such as Moodle, Blackboard, and Absorb where the cost ranges from 'free' to 'pricey.' Each LMS has its own pros and cons which need to be explored as to their suitability for our needs. Steve Hohman suggested using a WordPress-based LMS called Learn Dash that could be integrated into our Blue Database, which is also WordPress-based. Brooks Lyles expressed that it was essential that LMS integration includes use of the single password login from the main system. Steve Hohman's initial review of the Learn Dash: it appears there is no single user license fee, and that the system cost is \$200 a year. Steve will conduct more research on Learn Dash and report back at Spring Leadership. He will also discuss the Blue Database integration requirements with Mick Pitzer (Chief Technology Director) and James Osbourne (IT Committee).

Meeting was adjourned at 7:40 pm.

**THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT**

Filing Date: February 15, 2024

COMMITTEE NAME: Finance Committee Chairman: James Klingler
Chairman's Address: 33 Bethany Drive, Irvine, CA 92603 Chairman's Phone No. (949) 854-7698
Meeting Dates & Location: September 22, 2023, at 8:45am - meeting of the Finance, Budget, and Investment
Committees at the Brown Hotel, Louisville, KY.
Teleconference Dates: _____
Committee Communications by Mail or E-Mail Dates: _____
Expenses: None.

PURPOSE: The Finance Committee, as defined by Bylaw No. 19, Section 1 (c), provides oversight on the financial operations of NSSAR. The Committee evaluates all financial proposals and existing financial programs and reports findings and recommendations to the President General and the Executive Committee.

ACTIONS BETWEEN MEETINGS:

- (a) Reviewed monthly SAR and SAR Foundation financial statements posted on ShareFile.

PARTICIPATION at the September 22, 2023 joint Finance, Budget, and Investment Committee Meeting:

Finance Committee Members: J. Klingler (CA); W.L. Popham (FL); M. Elston (VA) TG Ex-Officio; D. Boring (DC); E. Hoak (MA); P. Moller (DE); R. Sexton (WA). Guest: M. Krebs, SAR Finance Director.

Budget Committee Members: D. McKelvie (CA); L. Popham (FL); M. Elston (VA) TG; D. Boring (DC); E.Hoak (MA).

Investment Committee Members: J. Klingler (CA); M. Elston (VA) TG Ex-Officio; S. Powell (NC); N. White (TX).

REPORT AND RECOMMENDATIONS:

At the joint Finance, Budget, and Investment Committee meeting on September 22, 2023, the following topics were discussed:

1. 2023 Budget Update – Dan McKelvie, Chairman
2. Review of NSSAR FY 2022 Financial Reports - Jim Klingler, Chairman; Megan Krebs, Finance Director
3. Financial Analysis Projects Update: SAR Education Center and Museum Financing Task Force – Jim Klingler, Lee Popham
National Dues Billing Task Force – Lee Popham
4. Investment Fund Update – Jim Klingler, Vice-Chairman

Financial Summary
(Unaudited Preliminary Results for FY 2023
Vs. Audited Results for FY 2022)

Revenues	FY 2023 Preliminary	FY 2022	Variance
NSSAR Revenues	\$3,850,561	\$1,969,426	\$1,881,135
Foundation Revenues	\$1,211,136	\$(1,033,660)	\$2,244,796

Total NSSAR revenues for the 12 months ended December 31, 2023, of \$3,850,561 were \$1,881,135, or 96%, above the same period last year primarily due to increased investment income (realized and unrealized) of \$1,560,851, and increased contributions of \$360,181, partially offset by lower dues revenue of \$(30,084).

Total Foundation revenues for the 12 months ended December 31, 2023, of \$1,211,136 included \$1,016,977 of contributions, and \$194,159 in investment returns, and were \$2,244,796 over the same period last year primarily due to increased investment returns (realized and unrealized) of \$1,909,681 and increased contributions of \$335,115.

Expenses	FY 2023 Preliminary	FY 2022	Variance
NSSAR Expenses	\$3,088,312	\$2,685,158	\$403,154
Foundation Expenses	\$219,577	\$217,392	\$2,185

Total NSSAR expenses for the 12 months ended December 31, 2023, of \$3,088,312 were \$403,154, or 15%, higher than the same period last year primarily due to increases in payroll expenses of \$219,861, special purpose program expenses of \$167,690, professional fees of \$21,879, and advertising and promotion expenses of \$26,864, partially offset by reductions in magazine expenses of \$(34,726). On a functional basis, there were increases in Genealogy expenses of \$99,991, Education expenses of \$136,348, and Management and General expenses of \$176,445, partially offset by decreases in Patriotic expenses of \$(17,059).

Total Foundation expenses for the 12 months ended December 31, 2023, of \$219,577 were \$2,185, or 1%, higher than the same period last year, primarily due to increases in payroll expense of \$23,267 and information technology expenses of \$7,056, partially offset by reductions in supplies and printing expenses of \$(22,077) and advertising expense of \$(7,157).

Change in Net Assets	FY 2023 Preliminary	FY 2022	Variance
NSSAR Change	\$1,203,778	\$8,114,724	\$(6,910,946)
Foundation Change	\$831,532	\$(10,081,508)	\$10,913,040

Total NSSAR change in net assets for the 12 months ended December 31, 2023, of \$1,203,778 in the current year was primarily due to revenues in excess of expenses of \$762,249 and transfers from the Foundation of \$160,027. The change in the prior year was primarily due to transfers from the Foundation of \$8,830,456, partially offset by expenses in excess of revenues of \$(715,732).

Total Foundation change in net assets for the 12 months ended December 31, 2023, of \$831,532 was primarily due to revenues in excess of expenses of \$991,559, partially offset by transfers to NSSAR of \$(160,027). The change in the prior year of \$(10,081,508) was primarily due to transfers to the NSSAR of \$(8,830,456), decreased investment income (realized and unrealized) of \$(1,715,522), and fundraising expenses of \$(217,392), partially offset by contributions of \$681,862.

Cash and Equivalents	FY 2023 Preliminary	FY 2022	Variance
NSSAR Cash	\$664,882	\$555,679	\$109,203
Foundation Cash	\$411,489	\$220,300	\$191,189

Total NSSAR cash and equivalents at December 31, 2023, of \$664,882 were \$109,203 or 20%, above the same period last year, primarily due to increased accounts payable of \$118,957.

Total Foundation cash and equivalents at December 31, 2023, of \$411,489 were \$191,189, or 87%, above the same period last year, primarily due to increased contributions of \$335,115.

Investments	FY 2023 Preliminary	FY 2022	Variance
NSSAR Investments	\$12,225,683	\$11,338,353	\$887,330
Foundation Investments	\$1,984,997	\$1,642,311	\$342,686

Total NSSAR investments at December 31, 2023, of \$12,225,683 increased \$887,330, or 8%, over the same period last year, primarily due to favorable investment income (realized and unrealized) of \$1,287,452.

Total Foundation investments at December 31, 2023, of \$1,984,997 increased \$342,686, or 21%, over the same period last year primarily due to favorable investment income (realized and unrealized) of \$194,159.

Debt	FY 2023 Preliminary	FY 2022	Variance
NSSAR Line of Credit	\$538,568	\$108,568	\$430,000
Note Payable	\$32,562	\$42,675	\$(10,113)

The NSSAR line of credit balance with Fifth Third Bank at December 31, 2023, was \$538,568, an increase of \$430,000 from the same period last year due to additional borrowings to fund operations. The line of credit matures in October 2024 and bears interest at the index rate of Term SOFR + 1.50%.

In October 2021, NSSAR executed a note payable with Marlin Business Bank in the amount of \$53,659 to purchase a scanner for the SAR HQ office. The note matures in October 2026 and bears interest at a fixed rate of 6.62%. The note previously was classified as an operating lease and now has been recorded as a note payable. The balance at December 31, 2023, was \$32,562, a decrease of \$(10,113) from the same period last year due to payments on the note.

Financial Ratio Analysis

In general, the NSSAR financial ratios are favorable to the selected benchmarks; however, the Current Ratio, the Quick Ratio, and the Debt to Assets Ratio in 2023 were unfavorable compared to 2022 due to the increased borrowing from the line of credit.

Liquidity Ratio	Benchmark	December 31, 2023	December 31, 2022
<u>Cash & equivalents</u> (Operating expenses- noncash expenses)	3-6 months cash on hand	4.4 months cash on hand	3.7 months cash on hand

Current Ratio	Benchmark	December 31, 2023	December 31, 2022
<u>Current assets</u> Current liabilities	2+ times coverage	1.5 times coverage	4.0 times coverage

Quick Ratio	Benchmark	December 31, 2023	December 31, 2022
<u>Current liquid assets</u> Current liabilities	1+ times coverage	1.1 times coverage	2.9 times coverage

Debt to Assets Ratio	Benchmark(a)	December 31, 2023	December 31, 2022
<u>Total Liabilities</u> Total Assets	5-10%	3%	1%

Program Expense Ratio	Benchmark(a)	December 31, 2023	December 31, 2022
<u>Total program expenses</u> Total operating expenses	50-83%	66%	67%

Administration Expense Ratio	Benchmark(a)	December 31, 2023	December 31, 2022
<u>Total admin expenses</u> Total operating expenses	17-25%	27%	24%

Fundraising Expense Ratio	Benchmark(a)	December 31, 2023	December 31, 2022
<u>Total fund raising expenses</u> Total operating expenses	10-15%	8%	8%

Fundraising Efficiency	Benchmark(a)	December 31, 2023	December 31, 2022
<u>Contributions</u> Fundraising expenses	5-10 times	6.8 times	4.3 times

Note(a): Benchmark ranges are based on Charity Navigator's requirement for a 3-Star rating.

Respectfully Submitted,
James Klingler, Chairman
SAR Finance Committee

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: January 10, 2024

COMMITTEE NAME: Flag Committee Chairman: Robert Meyer

Chairman's Address: 821 Arbordale Dr Cliffwood Beach NJ 07735 Chairman's Phone No. 732 688 3758

Meeting Dates & Location: Louis 16th room, Brown Hotel - Louisville, Kentucky

Teleconference Dates: 0

Committee Communications by Mail or E-Mail, Dates: 0

EXPENSES: 0

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)":

Attendance at Meetings: We had 38 members at our last meeting, September 2023, Brown Hotel, Louisville, Kentucky.

Teleconferences:

Other Service (specify):

REPORT & RECOMENDATIONS (*include progress on goals*):

The General Butterfield flag retirement certificate renaming was denied by Medals and Awards.

We will come up with another name at Spring Leadership this February for the flag retirement certificate.

As long as we come up with a name that is approved by medals and awards, we should be okay. We have plenty of money in our account.

The only barrier that we have come across is trying to come up with the name for the flag retirement program. We have had two names in the past, both of which have been rejected. We just need to come up with a better name.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 05 February 2024

COMMITTEE NAME: Genealogy Committee Chairman: William L. Schwetke (VA)
 Chairman's Address: 5424 Flycatchers Ct., Warrenton, VA 20187 Chairman's Phone No. 540-270-2722
 Meeting Dates & Location: No physical meetings
 Teleconference Dates: Zoom Meeting, 13 Nov 2023; Zoom Meeting, 29 Jan 2024
 Committee Communications by Mail or E-Mail, Dates: None

EXPENSES: \$800.00 from the Genealogy Endowment Fund for a booth in exhibit hall at RootsTech

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at the 13 Nov 2024 Zoom Meeting:

Genealogy Committee Members Present: [21] Chairman W. Schwetke (VA); Vice Chairman T. Peterman (KS); Genealogist General G. Green (NC); R. Bearden (AL); D. Brown (CA); D. Cook (VA); J. Faulkinbury (CA); M. Gregory (CA); P. Hays (DC); B. Hulse (KS); D. Kraft (MA); K. Mullen (VT); D. Roberson (AL); J. Schatzel (KS); J. Sinks (DC); E. Smith (AR); C. Smithson (MD); D. Temple (TX); R. Vance (NM); D. Van Wormer (OH); T. Ward (OH).

Guests present: [5] Secretary General D. Addington (NC); J. Anderson (MO); T. Guskey (NM); D. Witter (OR); J. Wyrosdick (SC).

Staff present: [1] M. Scroggins (Dir of Operations)

Attendance at the 29 Jan 2024 Zoom Meeting:

Genealogy Committee Members Present: [26] Chairman W. Schwetke (VA); Vice Chairman T. Peterman (KS); Genealogist General G. Green (NC); R. Bearden (AL); D. Brown (CA); D. Cook (VA); D Eagan (TN); J. Faulkinbury (CA); S. Gahafer (KY); M. Gregory (CA); P. Hays (DC); B. Hulse (KS); D. Kraft (MA); D. Lambert (MA); K. Mullen (VT); D. Roberson (AL); D. Robison (MA); J. Schatzel (KS); R. Sexton (WA); J. Sinks (DC); C. Smithson (MD); D. Temple (TX); E. Troutman (PA); R. Vance (NM); D. Van Wormer (OH); T. Ward (OH).

Guests present: [9] R. Cassell (AL); W. Edelen, Jr. (GA); R. Fish (WV); E. Gillian (AL); T. Guskey (NM); J. Lynch (VA); E. Matthews (AL); R. Peck (FL); J. Vink (IN).

Staff present: [1] M. Scroggins (Dir of Operations); B. Burchfield; K. Edds

REPORT & RECOMENDATIONS:

**NSSAR Genealogy Committee Meeting
13 Nov 2023 via Zoom**

At the 13 Nov 2023 meeting by Zoom, the following business was conducted:

Motion by Chairman Bill Schwetke that \$800 from the Genealogy Committee Endowment Fund checking account be drawn to pay for a table in the Exposition Hall at the 2024 RootsTech Conference in Salt Lake City, 29 Feb – 2 Mar 2024, and that funds as necessary for other related expenses be drawn from that checking account at the Committee Chairman’s discretion not to exceed the balance of the checking account.

Motion passed.

Motion by John Sinks, Chairman of the Revolutionary Taxes Subcommittee, to amend Genealogy Committee Policy 2.3001 Patriotic Service as follows:

2.3001 Patriotic service by material support can take the form of providing goods or supplies, money, or labor. Examples include:
(7 unchanged bullets omitted from the minutes)

Paying taxes, provided that no penalty fee was assessed, and payment was not made to a government under British control. (See Section 2.4004 below regarding Revolutionary Service based on payment of taxes.)

Motion passed.

Motion by John Sinks, Chairman of the Revolutionary Taxes Subcommittee, to amend Genealogy Committee Policy 2.4004 Payment of Taxes as follows:

2.4004 Payment of Taxes

Payment of a tax to a state or a local jurisdiction during the Revolution shall be deemed Patriotic Service by virtue of providing material aid, provided that the taxpayer was not charged a penalty rate or fee imposed for breaking the law and/or the taxpayer was not on record for having broken a law entailing a penalty such as a higher rate, penalty fee, fine, or seizure of property. A record such as a tax assessment roll, payment list, or a receipt is required. Evidence merely that a person had a legal obligation to pay a tax is not sufficient to establish service.

Payment of a tax or fee to a state or local jurisdiction shall not be deemed Patriotic Service if the payment was a license or specific governmental service for personal benefit, even if called a tax. This includes, but is not limited to, marriage licenses, writs, and the inspection or storage of commodities.

Motion passed.

Motion by John Sinks, Chairman of the Flagging Subcommittee, to amend Genealogy Committee Policy 3.5003 Acceptability of DAR and C.A.R. Applications as follows:

V. 3.5003 Acceptability of DAR and C.A.R. Applications.

- Official record copies of applications for membership in the Daughters of the American Revolution (DAR) or the Children of the American Revolution (C.A.R.) approved after 1 January 1985 shall be accepted as evidence of corresponding service, lineage and related facts on SAR applications. This shall not apply with respect to portions of those approved DAR or C.A.R. applications determined by the DAR, C.A.R., or the SAR to be:

- incorrect;
- unproven after an examination of new evidence to address concerns about facts that raise questions about the accuracy of unlikely claims, such as a date of birth that makes a person unlikely to be the parent of the next generation;
- based on a source specifically cited in Section 3.5006 as inadmissible; or
- SAR governing documents and written policy do not accept what DAR or C.A.R. have accepted as acceptable service.

Official copies of DAR or C.A.R. applications approved prior to 1 January 1985 may be accepted as evidence with respect to corresponding facts that have been individually marked as verified by the DAR or C.A.R. Official copies have verification marks made by the reviewing DAR or C.A.R. genealogist and have some indication that they are the official copies and not a personal or chapter copy.

Motion passed.

Motion by John Sinks, Chairman of the Flagging Subcommittee, to amend Genealogy Committee Policy 3.5006 Documents Inadmissible in Evidence as follows:

3.5006 Documents Inadmissible in Evidence. Documents that state beliefs or conclusions, but for which acceptable sources of the information cannot be determined, cannot be considered as evidence for establishing Revolutionary service, lineage or dates and places of birth, death, and marriage. Such documents include, but are not limited to:

(2 unchanged bullets omitted from minutes)

Published accounts, including family histories, local histories, biographical dictionaries, and newspaper articles which are not contemporary with the persons or events being reported, unless sources that are admissible can be determined. This includes, but is not limited to, accounts that relate family tradition or conclusions without presentation or citation of admissible evidence. Examples are the works of Livia Nye Simpson-Poffenbarger purporting to identify soldiers who participated in the Battle of Pt. Pleasant.

(6 unchanged bullets omitted)

Motion passed.

Motion by the Flagging Subcommittee to amend Genealogy Committee Policy 6.2002 “Flags on Already Approved Applications” as follows:

6.2002 Documenting Deficiencies and Solution on Patriots and SAR Applications.

When a deficiency in lineage or service and/or a solution to a deficiency is found for a previously approved SAR application, a record and notice of the issue will be established under the authority of the Genealogist General. This process will be known as flagging.

6.2002a. A file will be established or updated containing an explanation and analysis of the problem, the solution to the problem if available, and supporting documentation. Such files will be known as corrections files.

6.2002b. Notice of the problem, a “flag,” shall be entered in the appropriate system for the patriot and applications affected by the flag will be so marked. The flags shall include one or more general messages about the nature of the issue:

- FAMPCL (FUTURE APPLICANTS MUST PROVE CORRECT LINEAGE).
- FAMPCS (FUTURE APPLICANTS MUST PROVE CORRECT SERVICE).
- THIS LINE MAY NOT BE USED FOR MEMBERSHIP IN THE SAR.
- PROBLEMS HAVE BEEN DISCOVERED WITH AT LEAST ONE PREVIOUSLY APPROVED APPLICATION - SEE PATRIOT ANCESTOR’S FULL RECORD
- GRANDFATHERED (THIS APPLICATION WAS APPROVED UNDER THE “GRANDFATHER” PROVISION OF THE SAR BYLAW 1 SECTION 5 AND CANNOT BE USED BY FUTURE APPLICANTS UNTIL PROBLEMS IN THE PREVIOUS APPLICATION ARE RESOLVED).
- TNA—TREAT AS NEW ANCESTOR. DOCUMENTATION ABSENT.
- DATA IN CORRECTIONS FILE *

A detailed explanation, subject to limitations affording privacy for problems involving recent generations, will also be provided so that applicants and reviewing officials will know the specific problem, its solution if one is available, and can identify applications affected by the flag. For solutions of deficiencies with the patriot and the patriot’s service, corrections will be entered about the patriot detail page.

6.2002c. Any person can recommend placing or modifying a flag by submitting the recommendation with documentation to the Genealogy Committee for initial review.

6.2002d. When a new application which uses a previously approved SAR application as supporting evidence is reviewed and the previous application is found to be deficient or a deficiency is solved, a flag for the patriot will be entered using the same methods of review and approval that are used to approve applications.

6.2002e. The availability of documentation for applications approved prior to 1978 is limited and new proof of lineage and service may be required. Applications processed under the “grandfathering provision” in Bylaw 1 Section 5 may be excepted from new proofs.

Motion passed.

Motion by John Sinks, Chairman of the Flagging Subcommittee, to amend Genealogy Committee Policy 6.2003 Corrections File by deleting 6.2003 completely.

Motion passed.

Motion by Genealogist General Gary Green to amend Genealogy Committee Policy 6.3001 Priority in queue.

Motion referred back to Genealogist General.

Motion by Genealogist General Gary Green to amend Genealogy Committee Policy 6.3002 Expiration of Pended Applications.

Motion referred back to Genealogist General.

NSSAR Genealogy Committee Meeting **29 Jan 2024 via Zoom**

Chairman Schwetke reported:

The change to **5.4006 Policy with Respect to the Use of DNA Evidence** was approved by the EXCOM on 29 Nov 2023.

Rob Sexton is leading the Genealogy Committee's participation in RootsTech with a booth in the Exhibit Hall 29 February thru 02 March in Salt Lake City. We are sharing our booth with the PRS Committee again, which worked very much to our benefit at NGS last Spring. RootsTech conflicts with Spring Leadership this year, but if you will be at RootsTech, contact Rob, let him know you'll drop by the booth, and any help you could render in manning the booth would be appreciated.

SAR Staff Genealogist Deborah Maddox is attending at her own expense and will be available to assist with the SAR booth during her limited free time.

Genealogist General Gary Green gave his report.

John Sinks reported on the Flagging Subcommittee and on the Taxes Subcommittee.

At the 13 Nov 2023 meeting by Zoom, the following business was conducted:

Motion by Chris Smithson that would recommend changing "wife" to "spouse" in Generation 1 on the SAR Application.

Motion failed.

Motion by Vice Chairman Timothy Peterman that the portion of Policy 5.4006 with Respect to the Use of DNA Evidence be amended (final wording shown below):

DNA proofs linking earlier generations can be used only if the DNA proof argument is prepared by a professional genealogist with expertise in DNA analysis such as:

- DNA specialist holding certification by the Board for the Certification of Genealogists.
- An author of published, peer-reviewed DNA-based research appearing in a prominent genealogical journal (such published work itself may be cited in a proof argument prepared by the applicant).

Exceptions to this limitation may be approved by the Genealogist General.

The applicant will bear the cost of the accepted genealogist. The SAR will accept the conclusions reached by a recognized DNA expert without re-review. However, the proof argument used, including all supporting documentation and consent forms, must be included with the application submittal.

Motion passed as amended.

Motion by Genealogist General Gary Green that Policy 6.3000 Pended Applications, 6.3001 Priority in queue, and 6.3002 Expiration of Pended Applications, be amended.

Motion failed.

Respectfully Submitted,
William L. Schwetke, Chairman

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 2/5/2024

COMMITTEE NAME: George Washington Endowment Fund Board

Chairman: Edmon H. McKinley

Chairman's Address: PO Box 847 Thomasville, Alabama 36784

Chairman's Phone No. 334-636-4882

Meeting Dates & Location: NONE

Teleconference Dates: NONE

Committee Communications by Mail or E-Mail, Dates: _____

EXPENSES: NONE

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

1. E. McKinley (AL) – Chairman
2. J. Thomas (VA) – Vice Chairman
3. R. Moore (HI)
4. J. Fulwider (MS)
5. G. Green (NC)
6. R. Coursey (GA)
7. J. Maples (AL)

Attendance at Meetings:

Teleconferences: The Chairman had numerous email and teleconference calls with the GWEF Fundraising Subcommittee Chairman, Compatriot Jim Maples, and the GWEF Distribution Subcommittee Chairman, Compatriot Roger Coursey, concerning new member progress, distribution applications, and addressing specific issues and goals.

Teleconferences: The Chairman attended a Zoom conference on January 30, 2024, with the GWEF Fundraising Committee.

Other Service (specify):

REPORT & RECOMENDATIONS (*include progress on goals*):

Promoting the GWEF, the Chairman attended the NCSSAR BOM in Raleigh, NC, on September 30, 2023. He also attended the South Atlantic District meeting on October 6-7, 2023, in Gaffney, SC. Continuing his promotion of the GWEF, he then attended the OHSSAR BOM in Bellville, OH, and the TXSSAR Annual Meeting in College Station, TX, on October 20-21, 2023, where 12 new GW Fellows were welcomed. In Bay City, Michigan, he attended the Great Lakes District meeting held on October 27-28, 2023. To finish off his travels in 2023, he attended the CASSAR Annual Meeting held on the *Queen Mary* on November 3-4, 2023. In 2024, he attended the GASSAR BOM on January 26-27, 2024. He plans to attend the ALSSAR Annual Meeting on February 23-24, 2024, before Leadership.

Besides the large number of GW Fellows recruited on my visit to the TXSSAR, I would also like to congratulate the Withlacoochee Chapter of the Florida Society from which the GWEF has gained 15 GW Fellows.

We have gained 36 new GW Fellows since Fall Leadership and a total of 96 new GW Fellows since March 1, 2023, which translates into pledges and donations of \$105,450.00. The new GW Fellows represent 27 state societies. **THE CHAIRMAN WISHES TO THANK ALL THE STATE SOCIETIES FOR THEIR EFFORTS TO SUPPORT THE GWEF, AND HE WELCOMES ALL THE NEW GW FELLOWS.**

Currently, the GWEF Distribution Committee has \$15,256.52 that has not been approved or partially approved for distribution. State societies should contact Distribution Chairman Roger Coursey should they have worthwhile projects they would like the GWEF Distribution Committee to consider.

The Chairman would like to thank Compatriot Jim Maples, Chairman of the GWEF Fundraising Committee, for his diligent work on the committee's spreadsheet. Additionally, the Chairman commend Compatriot Roger Coursey, Chairman of the GWEF Distribution Committee, for his and his committee's careful review of distribution requests and stewardship of the GWEF's distributable funds. Additionally, Vice Chairman Jeff Thomas needs to be applauded for his work in support of the committee. Please see their separate reports for more detail.

The GWEF stands committed to financially assist unfunded and underfunded national committees and State Societies with their projects promoting the NSSAR.

THIS REPORT SHOULD BE READ IN CONJUCTION WITH THE GWEF DISTRIBUTION COMMITTEE REPORT AND THE GWEF FUNDRAISING COMMITTEE REPORT

Respectively Submitted,

Edmon H. McKinley

Edmon H. McKinley, Chairman

George Washington Endowment Fund Board

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 17 Jan 2024

COMMITTEE NAME: GWEF Distribution Committee Chairman: Roger W. Coursey
Chairman's Address: 259 Stagecoach Ave, Guyton, GA 31312

Last Meeting Dates & Location: 22 Sep 2023, Spring Leadership - Brown Hotel, Louisville, KY

Teleconference Dates: None

Committee Communications by Mail or E-Mail, Dates: 8/16, 8/17, 8/21, 8/22, 9/14, 9/25, 9/26, 9/27, 10/1, 10/2, 10/10, 10/17, 10/19, 10/20, 10/22, 10/23, 10/27, 11/8, 11/9, 11/14, 11/17, 11/26, 11/29, 1/16/24, 1/17

[PARTICIPATION: *We continue to meet monthly by email.*]

Chairman: **CAPT Roger W. Coursey, USCG**
259 Stagecoach Avenue
Guyton, GA 31312-5333
email: captrog2000@yahoo.com
phone: (h) 921 728-3286
phone: (c) 912 398-8055

Vice Chair: **Scott George Giltner**
605 Dorsey Way
Louisville, KY 40223
email: stgilt@earthlink.net
phone: (c) (502) 649-4534

MEMBERS:

- | | |
|---|--|
| 1. William T. Allgood (SC) | 11. Allen R. Finley (GA) |
| 2. Roger D. Barnhart (IN) | 12. Scott G. Giltner (KY), Vice Chairman |
| 3. David G. Boring (DC) | 13. Jonathan D. Hunt (MO) |
| 4. Paul R. Callanan (MI) | 14. Edmon McKinley (AL) (GWEF Chair)(Ex-Officio) |
| 5. Kevin Ray Carr (NM) | 15. Edward Paul Rigel, Jr (GA) |
| 6. Toby L. Chamberlain (IL) | 16. PG John Michael Tomme, Sr (GA) |
| 7. Finley J. Coles (WV) | 17. Tony L. Vets (LA) |
| 8. Roger W. Coursey (GA), Chairman | 18. Dr Keith A. Weissinger (WA) |
| 9. Russell F. DeVenney, Jr. (MO) | |
| 10. Michael James Elston (VA) TREASURER GENERAL (Ex-Officio) | |

Activities of this Committee since the 2023 Congress Reporting

The GWEF Distribution Committee continues to be active and maintain steady correspondence since the **2023 Fall Leadership Reporting** and will continue this up to the **2024 Congress Reporting**.

The Chairman has sent a letter via the COSP Newsletter to all National Committee Chairman and to all State Society Presidents to review the balance of their financial needs for 2023-2024 and submit their financial requests between now and the 2024 Spring Leadership meeting. Email is the preferred method of submitting requests.

Funding Requests Approved between the 2023 Fall Leadership Report and this Report

Patriot Records Committee – PBR Website Domain Hosting	\$ 287.64
Texas Society – Texas SAR Monument Project, Texas State Cemetery in Austin	\$15,000.00
Alabama Society – Exhibit in Murphy House Museum, Tuscaloosa, AL	\$ 550.00
Wisconsin Society – Patriot Aaron Smith Burial Site – Plaque, Burlington, WI	\$1,209.73
Rhode Island Society – MG Nathanael Green/SAR 250 th Anniversary Memorial Bench	\$3,526.00
Missouri Society – Battle of Fort San Carlos Wayside Marker, Ste. Genevieve, MO	\$2,000.00
GWEF Fundraising Committee – Postage & Supplies	\$ 290.08
North Carolina Society – Memorial Stone Monument for 30 Patriots, Pilgrim Reformed Church	\$3,000.00
Total:	\$25,863.45

(20) Funding Requests Processed (considered) to date in 2023: \$54,568.40
(19) Funding Requests Approved or Partially Approved to date in 2023: \$48,316.40

We continue to promote financial support of ‘Unfunded’ and ‘Underfunded’ National Committees and worthwhile Patriotic Projects in State Societies. Requests should be sent to the Distribution Committee Chairman, Roger W. Coursey, who will schedule a presentation at a Committee Meeting or make an electronic presentation to the Committee for consideration.

2023-2024 GOALS

The GWEF Distribution Committee works hand in hand with the *GWEF Board* and the *GWEF Fund Raising Committee* to aggressively promote the *George Washington Fellows* program and to *financially assist* Unfunded and Underfunded National Committees. It is also our *Mission* to assist State Societies with their Patriotic Projects across America.

We will continue to be good ‘Stewards’ of the George Washington Endowment Fund.

Roger W. Coursey
 Roger W. Coursey, Chairman
 GWEF Distribution Committee

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION

COMMITTEE REPORT

Filing Date: February 5, 2024

COMMITTEE NAME: GWEF Fundraising Chairman: James H. Maples
Chairman's Address: 1501 Elmwood Dr, Huntsville, AL 35801 Chairman's Phone No. 256-656-9898
Meeting Dates & Location: Fall Leadership 2023
Teleconference Dates: Zoom Meeting - January 30, 2024
Committee Communications by Mail or E-Mail, Dates: Various

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at meetings: J. Maples (AL); J. Griffith (AL); T. Chamberlain (IL); J. Turley (WV);
D. Thompson (AZ); T. Jackson (TX); E. Alford (AL); J. Fulwider (MS); D. Carr (TN); R. Barnhart (IN); K.
Mullen (VT); W. Allgood (SC); E. McKinley (AL); S. Hohman (FL); D. Brown (CA); R. Coursey (GA).

REPORT & RECOMENDATIONS (*include progress on goals*):

For the GWEF year which began 1 April 2022 and ended 31 March 2023:

- 70 new GW Fellows.
- \$70,000 in pledges and donations.
- 23 State Societies participating.
- The winner of both the Howard Horne and Buck Meek awards was the Nevada Society.

For the GWEF year which began 1 April 2023 and runs through 31 March 2024:

- 96 new GW Fellows.
- \$105,450 in pledges and donations.
- 27 State Societies participating.

We have a new GWEF pin! This is a slightly larger pin than our current pin and is a beautiful design. It is available to all current GW Fellows at no charge and of course all new GW Fellows will get the new pin.

A special GW Fellow pin celebrating the America's 250th Anniversary is available for \$50 each. 100% of the proceeds go to the GWEF. To date, over \$6000 has been raised from the sale of pins.

Goal: Continue to recruit new GWEF Fellows to grow the GWEF Endowment Fund.

THIS REPORT SHOULD BE READ IN CONJUNCTION WITH THE GWEF BOARD AND GWEF DISTRIBUTION COMMITTEE REPORTS.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 18 January 2024

COMMITTEE NAME: Handbook Chairman: Edward P. Rigel, Jr.
Chairman's Address: 1608 Indian Way, Cumming, GA 30040 Chairman's Phone No. (770) 757-6070
Meeting Dates & Location: None scheduled
Teleconference Dates: None scheduled
Committee Communications by Mail or E-Mail, Dates: None

EXPENSES: _____

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)":
P. Davenport (VA), K. Lawrence (MO), E. McKinley (AL) – ex officio

Attendance at Meetings: N/A

Teleconferences: N/A

Other Service (specify): N/A

REPORT & RECOMENDATIONS (*include progress on goals*):

-Volume II: The Chairman received a request to update the Vision Statement of the Education Committee and the Outreach to Schools Subcommittee. Pending approval by the Executive Committee (if required), these changes will be published after Spring Leadership.

-Volume IV: The Chairman received a request from President General Dodd to consider revision to the Protocol section of this volume, specifically, to remove/change language that indicated the President General will be the principal speaker when he attends an SAR function. No action taken at this time.

-Volume V: Updated with changes received from Medals & Awards Chairman Paul Callanan. Compatriot Callanan continues to provide expert guidance on this volume, and his contributions are greatly appreciated.

-The updated Volume V was submitted to Mike Scroggins and all current versions are published on the SAR website.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 1/22/2024

COMMITTEE NAME: Headquarters and Maintenance Chairman: Ken Goodson
Chairman's Address: 1084 Balsam Hill Ave SE Grand Rapids MI, 49546 Chairman's Phone No. 616-836-8298
Meeting Dates & Location: 9/21/2023, Fall Leadership

Teleconference Dates: 12/30/2023 and 1/25/2024, Zoom

Committee Communications by Mail or E-Mail, Dates: 9/6/2023, 9/7/2023, 9/8/2023, 9/11/2023, 9/13/2023, 9/14/2023, 9/15/2023, 9/18/2023, 9/19/2023, 9/20/2023, 9/22/2023, 9/25/2023, 10/3/2023, 10/4/2023, 10/5/2023, 10/6/2023, 10/8/2023, 10/9/2023, 10/12/2023, 10/13/2023, 10/16/2023, 10/17/2023, 10/19/2023, 10/20/2023, 10/23/2023, 10/24/2023, 10/25/2023, 10/27/2023, 10/30/2023, Nov-1, 2, 3, 6, 7, 8, 9, 10, 13, 14, 15, 16, 17, 18, 20, 21, 22, 24, 27, 28, 30-2023, Dec 1, 4, 6, 8, 11, 13, 15, 18, 21-2023, Jan-4, 7, 12, 13, 16, 21-2024

EXPENSES: \$0.00

PARTICIPATION

Attendance at Meetings-and teleconferences:

K. Goodson (MI); M. Scroggins (KY); T. Maybee (NY); B. Austin (WI); D. Brown (CA); H. Fisk (MO); D. Addington (NC); D. McKelvie (CA); D. VanHoof (MI); D. Collins (KY); F. Olive (AL); W. Greenly (GA); J. Ferris (CA); S. Taylor (VI); L. Popham (FL); Keith Weissinger (WA); M. Weyler (VA)

Guests P. Callanan (MI)

REPORT & RECOMENDATIONS

Over the past three years, the Committee has pushed for, and approvals have been granted by the Trustees for:

Investments in our building and to our employees over this timeframe, roughly \$1.1mm.

Update of ongoing projects:

- The elevator installation has an expected completion of March 2024.
 - Parts have delayed the project with the last delivery expected in February with a 4-week completion time. From Trustee approval to completion will be 13 months.
 - The current elevator enhancements are on hold due to the price increasing nearly 50%. The committee will be working on funding sources to determine when this project can proceed.
- Office restructuring relay out.
 - The project kicked off in October with construction; completion of office furniture installation was completed mid-January. A final walkthrough to discuss punch list items will take place February 2.
- Sealing of the basement wall in the alcoves below the sidewalk is being reviewed for funding. The project will seal the walls, after tuck pointing, and reroute ducts from an unused heating unit to blow

warm dry air into the area to eliminate the dampness. Structural engineers have reviewed the plan and recommended these changes; we just have to find the funds.

- HVAC component replacement was installed in January.
 - Replacing 20- and 15-ton units behind the building.
- Security has been upgraded with:
 - Additional panic buttons being placed on each floor.
 - Cameras realigned to see a more complete angle at different points.
 - A ring style entry added to the back door.

Future projects:

- The Merchandise space may be able to upgrade with redundant furniture from the relay out; lighting will also be addressed.
- The addition of a dock lifting device has been assigned to the Museum Committee in that it is not needed for the building's day-to-day operation but is necessary for the Museum.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 5 February 2024

COMMITTEE NAME: History Chairman: Jeff Thomas (VA)
Chairman's Address: 6608 White Post Rd, Centreville, VA 20121 Chairman's Phone No. (703) 449-1157
Meeting Dates & Location: Zoom Meeting – 1 Feb 2024 - 8pm ET
Fall Leadership – Friday, Sep 22, 2023, Brown Hotel – Broadway A, 3:00-5:00pm

PARTICIPATION:

Attendance at Fall 2023 Leadership: J. Thomas (VA) – Chairman; R. Williams (NJ) – Vice Chairman; B. Osborn (VA) – Reenactor & Living History Chair; B. Sharp (MI) – Historic Sites & Celebrations Chair; B. Lyles (NC) – Historian General; K. Bonner (VA); C. Canine (KY); E. Coggins (VA); S. Collins (GA); T. Dioquino (VA); J. Doss (KY); B. England (AL); S. Giltner (KY); C. Grimes (NC); R. Helderman (IN); S. Hohman (FL); D. Hoover (MD); P. Kelly, Jr. (VA); D. Ludley (GA); R. Meyer (NJ); P. Moller (DE); C. Olsen (MO); D. Perkins (CT); L. Raborg (MD); E. Rigel, Jr. (GA); B. Schwetke (VA); L. Stevens (TX); S. Sullins (MO); J. Turley (WV); D. Woodruff (SC) + 21 guests

Attendance at January 2024 Meeting: J. Thomas (VA) – Chairman; R. Williams (NJ) – Vice Chairman; B. Osborn (VA) – Reenactor & Living History Chair; B. Lyles (NC) – Historian General; A. Akers (NH); M. Anthony (GA); K. Bonner (VA); C. Canine (KY); D. Carr (TN); D. Corey (VA); T. Dioquino (VA); J. Doss (KY); S. Giltner (KY); C. Grimes (NC); M. Gunn (OH); R. Helderman (IN); L. Leslie (KY); D. Ludley (GA); E. McKinley (AL); G. Parriott (NV); R. Redner (GA); E. Rigel, Jr. (GA); J. Trussell (GA); J. Turley (WV); P. Wesolosky (KY)

Email Communications: Reenactor & Living History Report, 12 January 2024; Historic Sites & Celebrations Report 5 February 2024; multiple subcommittee communications.

2023-24 GOALS

1. To implement the Historical Program Goals in the SAR 5-year operational plan.
2. To support the Historical and Educational mission and vision of the national society.
3. To increase participation in the History Committee awards including the Stewart Boone McCarty Award, the Stephen Taylor Award, and the SAR Historic Preservation Award.

COMMITTEE VISION: Grow public awareness and understanding of the significance of the American Revolution and our nation's founding history.

COMMITTEE MISSION: Promote and preserve the history of the American Revolution and pursue efforts to educate and engage the public in our nation's founding history.

COMMITTEE ACTIONS SINCE FALL LEADERSHIP

Secured History Committee table for Spring Leadership to promote the new SAR Historic Preservation Award and to promote the new Historic Preservation medals for program funding. Finalized order for 100 Historic Preservation Medals, approved at Fall Leadership, to raise funds for the award and other History Committee programs. Secured approval of Executive Director for Historic Preservation lapel pins.

Program Chair Ron Redner sent letters to all Georgia State Senators representing the 64 counties in Georgia named after a patriot to garner their support for placing 250th Liberty trees and plaques to honor the patriots.

Provided updates on 5-Year Historical Program Goals for bi-monthly Executive Committee reports; provided review of historical content for episodes of the *Revolutionary Rarities* podcast, prepared Henry Knox Bookshelf of recommended reading for *SAR Magazine*, provided historical content for the Decade of the American Revolution for publication in the *SAR Member Directory*.

Appointed judging panel for the Historian General Awards consisting of Roger Williams, Andy Akers, Ken Bonner, Scott Giltner, and John Trussell and appointed a task force of Roger Williams, Andy Akers, Scott Giltner, and John Trussell to develop the criteria and funding for a proposed SAR book award.

SUBCOMMITTEE REPORTS:

History 250 Subcommittee

Engagement by state societies in the 250th marker program to meet Strategic Goal 3A continues to grow.

- SAR 250th Memorial Benches. John Trussell Chair. Goal is at least one bench in each state. To date, one-third of state societies have identified sites and/or dedicated benches. Benches were and will be dedicated at the 2023 and 2024 Annual Congress and are planned for the 2025 and 2026 Annual Congress.
- SAR 250th Liberty Trees. Ron Redner Chair. Goal is 250 trees for the 250th with at least one tree in every state. To date, 51 trees have been planted. Proposed Memorial Day tree dedication in Arlington National Cemetery. Program promotes planting trees with plaques in the 475 counties and cities in the U.S. named after a patriot. A cast aluminum plaque and granite marker have been produced.
- A new Battlefield Guides program is being developed to produce promotional and informational guides for the 37 SAR national events for internal and external audiences. A task force has been formed to design a template and coordinate production composed of Roger Williams, Steve Hohman, Andy Akers, and Bo Vets.

Historic Preservation Subcommittee

- The new SAR Historic Preservation Award was approved by Medals & Awards and the Executive Committee at Congress. The award is presented to chapters and state societies who have made significant contributions to the historic preservation of the American Revolution, its patriots, and the heritage of our nation's founding era. Preservation projects include installation of interpretative and commemorative markers, restoration and maintenance of graves and cemeteries, and conservation of historic properties, battlefields, sites, landscapes or objects.
- The new SAR Historic Preservation Medal was approved by Medals & Awards and the Executive Committee at Fall Leadership to raise funds for the SAR Historic Preservation Award and other History Committee programs. Funding for the medals was provided through generous contributions from Brooks Lyles, Scott Collins, Dave Hoover, and Ken Bonner.

SAR Magazine & Publications Subcommittee

- The *Henry Knox Bookshelf* of recommended books on the Revolutionary War, sponsored by the History Committee, is available in the *SAR Magazine* and on the SAR Education website. The list is an effective tool for promoting the SAR within the publishing industry. A supply of books from the list has been secured for the SAR Library and as prizes for the *Revolutionary Rarities* podcast. The committee is considering the criteria, timeline, process, benefits, amount, and design of a proposed SAR Henry Knox Book Award. The SAR is the only major lineage organization without an award.

Historian General Awards Subcommittee

- The Historian General Awards will be promoted through the Council of State Presidents at Spring Leadership. A dedicated URL will be provided to state societies for nominating compatriots for the Minnesota Society Stephen Taylor Award for history preservation through research & writing and for the Col. Stewart Boone McCarty award for history preservation through teaching and education.

Respectfully Submitted: *Jeff Thomas*, Chairman

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: February 5, 2024

COMMITTEE NAME: Historic Sites and Celebrations Chairman: William E. Sharp III
 Chairman's Address: 167 Kingsbrook Ave, Ann Arbor, MI 40103 Chairman's Phone No. 260-413-7547
 Meeting Dates & Location: September 22, 2023 - Louisville, KY
 Teleconference Dates: None
 Committee Communications by Mail or E-Mail, Dates: 2/3/2024
EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)":

Spring Leadership: MEMBERS: W Sharp, (IN) Chairman; C. Louis Raborg Jr., (MD) Vice Chair; B. Lyles, Hist. General (NC); S. Collins (GA); T. D. Dioquino (VA); S. Giltner (KY); R. K. Helderman (IN); R. Meyer (NJ); C. Olson (MO); J. Thomas (VA); R. Williams (NJ); P Wesolosky (KY). **GUESTS:** B. Baran (AZ); D. Shaul (MO); E. Coggins (VA); D. Schader (DE); B. England (AL); E. Rigel, Jr. (GA); J. Turley (WV)

GOALS (Approved by President General)

1. Add at least 1 new National Historic Sites/Celebration annually
2. Work with chapter and/or state societies to develop events.
3. Maintain & publish an annual official National Historic Sites & Celebrations Calendar
4. Collect reports of each event after they are conducted
5. Develop Strategic Plan Items of individual events for 250th Anniversary
6. Support the 250th Anniversary of each National Event

REPORT & RECOMENDATIONS (*include progress on goals*):

1. The Battle of Cooch's Bridge, submitted by the Delaware Society, was approved to occur the first Saturday in September.
2. The Ft. San Carlos Festival held in Sainte Genevieve, MO, on the date of the Ft. San Carlos Battle National Event, was merged with that approved event, as the event, because the National Park Service will not allow any celebrations under the St. Louis Arch to occur, which is the place the Battle actually took place.
3. Three applications for National Event consideration have been received from the Virginia Society: Battle of Virginia Capes, Muster of the Overmountain Men, and The Fairfax Resolves. They will be considered at the Spring Leadership meeting.
4. Reports of each National Historic Event held in 2023 and to date in 2024 have been collected to include attendance, National officers present, State Societies present, Chapters present, other organizations present, whether virtual and/or in-person, etc. A member of the National Color Guard Command Staff as well as the President General has been present at a number of the 2023 & 2024 events.
5. At each of these events, the 250th Anniversary SAR flag is flown and the 250th is described by a speaker.
6. Discussion of possible ways the Historic Sites & Celebrations Committee can contribute to the SAR 250th Anniversary is ongoing.
 - a. Comments concerning the 250th Anniversary need to be made by speaker and 250th Anniversary flag displayed.
 - b. At 250th Anniversary of a particular historic celebration
 - i. Have present/past General Officer speak/lay wreath.
 - ii. Hand out event anniversary pins/challenge coins to participants.
 - iii. Interpretative tour of the battle site.
 - c. Recruiting at events needs to be deliberate (see link on SAR HS&C web site for ideas)
 - d. Advertising must be deliberate (see the SAR Public Relations package)

Status of the Historic Sites and Color Guard Celebrations in 2023

DATE	NAME	PLACE	EVENT HELD
26-Aug	Battle of Brooklyn	Brooklyn, NY	Yes
3-Sep	Battle of Groton Heights	Groton, CT	
9-Sep	Battle of Eutaw Springs	Eutawville, SC	Yes
10-Sep	Battle of Saratoga (American)	Stillwater, NY	
17-Sep	Gathering at Sycamore Shoals	Elizabethton, TN	Yes
17-Sep	Vigil at Washington's Tomb	Mt Vernon, VA	Yes
10-Oct	Point Pleasant Battle Days	Point Pleasant, WV	
3-Oct	Battle of Chestnut Neck Creek	Port Republic, NJ	Yes
7-Oct	Battle of Kings Mountain	Blacksburg, SC	Yes
15-Oct	Yorktown Days	Yorktown, VA	Yes
22-Oct	Battle of Red Bank	National Park, NJ	Yes
11-Nov	Veterans Day*	Nationally	Yes
18-Nov	Siege of Fort Morris	Fort Morris Historic Site, Midway, Georgia	Yes
3-Dec	Battle of Great Bridge	Norfolk, VA	Yes
17-Dec	Wreaths Across America	Nationally	Yes
26-Dec	Ten Critical Days	Trenton, NJ	Yes
Any Date	Honor Flights	Nationally	Yes
Any Date	Liberty Tree Dedication*	Nationally	

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
SUBCOMMITTEE REPORT

Filing Date: 12 January 2024

COMMITTEE NAME: Reenactor & Living History Liaison Chairman: Brett W. Osborn
 Chairman's Address: 1185 Senseny Rd., Winchester, VA 22602-6024 Chairman's Phone No. 540-409-1140
 Meeting Dates & Location: 1 March 2024, Brown Hotel - Louisville, KY
 Teleconference Dates: Museum Board Zoom meetings - 2 August 2023, 21 September 2023, 11 October 2023, 5 December 2023; History Committee Zoom meeting - 23 August 2023.
 Committee Communications by Mail or E-Mail, Dates: Committee emails - 10 Jan 2023, 6 July 2023, 23 August 2023, 10 January 2024

EXPENSES: _____

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"): _____

Attendance at Meetings: @ 22 September 2023: B Osborn (VA); K Bonner (VA); B Schwetke (VA); R England (AL); D Hoover (MD); P Kelly (VA); J Thomas (VA). Guests: C Grimes (NC); J Doss (KY); P McMurchie (KY).

Due to schedule conflicts, many of the History Committee left for other committee meetings before the Subcommittee meeting started.

Teleconferences: Zoom, History 250th Sub-Committee meeting, 2 February 2023.

Other Service (specify):

REPORT & RECOMENDATIONS (*include progress on goals*):

Sub-Committee Chairman Osborn submitted one article on Reenactments/Living History, for the SAR *Colorguardsman* magazine for the January 2023 edition and two articles for the April 2023 edition; two articles for the July 2023 edition; one article for the October 2023 edition; and submitted three articles for the January 2024 edition.

Sub-Committee Chairman Osborn attended a New England cartridge box workshop hosted by the National Park Service on 4 November 2023 in Concord, MA, and the 16 December 2023 250th Anniversary event of the Boston Tea Party with the President General, Secretary General, Historian General, and the NSSAR Color Guard Commander in Boston, MA. Also attended the 6 January 2024 Continental Line scheduling meeting in King of Prussia, PA, to update 2024 Reenactment/Living History Events List. Chairman Osborn appointed to SAR Museum Board in July 2023 for one year.

Sub-Committee Chairman Osborn attended the following events: the wreath laying ceremony at the Princeton battlefield in New Jersey on 7 January 2024 with Past President General Wright and NSSAR Color Guard Commander Collins. Compatriot Osborn plans on attending the January 2024 Battle of Cowpens anniversary event at the Cowpens National Park site. Sub-Committee Chairman attended the NSSAR Congress in Orlando, FL, July 2023, and the Atlantic Middle States Association District Conference, Tarrytown, NY, 11-12 August 2023, with Historian General and the History Committee Chairman.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 29 Jan 2024

COMMITTEE NAME: Hospitality and Music

Co-Chairmen: Thomas Showler (Hospitality), David Carr (Music)

Chairman's Address: Thomas Showler Chairman's Phone No. (814) 616-6940
2323 Edinboro Rd Unit GH31
Erie, PA 16509-8309

Chairman's Address: David Carr Chairman's Phone No. (423) 360-6090
2064 Falling Leaf Dr
Kingsport, TN 37664

Meeting Dates & Location: Meeting dates correspond to Leadership and Congress meetings.

Teleconference Dates: N/A

Committee Communications by Mail or E-Mail, Dates: Hospitality –

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)):

Attendance at Meetings:

N/A

Teleconferences:

N/A

Other Service (specify): All members at the ready.

REPORT & RECOMENDATIONS (*include progress on goals*):

HOSPITALITY:

A welcome letter addressed to new attendees (Green Dots) of this Leadership Meeting was placed in their registration packets.

A fold-up downtown map of the City of Louisville was also placed in their registration packets with the request that they use it to explore the area surrounding the Brown Hotel. They were then asked to take the map home and return with it for each subsequent Leadership meeting.

Several reserved tables at the Friday morning Continental breakfast were requested for the new attendees providing a chance for them to greet others before the scheduled tour of Headquarters later that day. Members of the Hospitality and Music Committee will be at tables to welcome the new attendees, answer questions, etc.

MUSIC:

The PG has requested a music program at the Friday banquet. The SARpremes will prepare songs for the enjoyment and inspiration of all. We plan rehearsal in a designated room prior to the banquet.

Compatriots Hilton Martin and David Carr will assist acting Chaplain General Vernon Welkner with the Sunday morning worship service.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 20 January 2024

COMMITTEE NAME: Human Resources Chairman: James Petres
Chairman's Address: 343 Fairbrook Ct. Northville, MI 48167 Chairman's Phone No. 810-355-8060
Meeting Dates & Location: Last meeting was March 3, 2023 (Spring Leadership)
Teleconference Dates: Zoom, 12-7-23
Committee Communications by Mail or E-Mail, Dates: Several communications with PG and staff

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Meeting at Fall Leadership, September 22, 2023.

Members: Chairman J Petres (MI) PG W Alter (AZ) T Foxwell (DE)
W L Popham (FL) E Rigel Jr. (GA) L Stevens (TX)
PG M Tomme Sr. (GA)
Staff: Exec Dir. T Bale Finance Director M Krebs
Guests: Librarian General F Olive (AL)

Zoom meeting December 7, 2023.

Meeting with PG J Dodd, SC D Addington, TG M Elston, CG E McKinley, Exec Dir T Bale to discuss personnel issues.

Other Service (specify):

Chairman communicated with President General, other General Officers, and staff regarding personnel matters and potential Handbook revision.

REPORT & RECOMENDATIONS (*include progress on goals*):

No recommendations at this time.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: February 5, 2024

COMMITTEE NAME: Information Technology Chairman: Robert S. Cohen

Chairman's Address: PO Box 443, Wellborn TX 77881 Chairman's Phone No. 979 690 3500

Meeting Dates & Location: Subcommittees meet mostly virtual for Project Management Group and Website Subcommittees other than Digitization, PRS & GRS which have their own report in this book.

Teleconference Dates: Project Management Group – Weekly Monday AM & Thursday AM with Mission Data Staff. The Website Subcommittee met on alternate Wednesday evenings during Oct. thru Jan.

Committee Communications by Mail or E-Mail, Dates: Frequent communication by email throughout interim, and email status reports from Mission Data.

EXPENSES: None reported other than contract work with Mission Data.

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at Meetings:

Fall Leadership 2023 – **Members** – G. Green (NC); S. Massey (TX); M. Tomme (GA); M. Scroggins (KY); S. Hinson (OH); C. Canine (KY); S. Hohmnan (FL); A. Greenly (GA); B. Cohen (TX); J. Osbourn (MO); B. Schwetke (VA); C. McMillan (MO); J. Engler (MD); J. Jones (IN); L. Josefowski (DE); J. Faulkinbury (CA); G. Overton (KY); K. Mullen (VT). **Non-Members** – W. Fristensky (NJ); A. Abbott (TX); B. Hannah (AL); T. Holden (TX); W. Burchfield; D. Maddox; K. Edds; B. Osbourn (MO); E. Steward; B. Bennett; M. Tyler (OH); J. Hamill (OK); D. Anderson (MD); R. Smith; S. Gahafer (KY); M. Byars (NE); T. Hagan; J. Wyrosdick (SC); T. Bale (KY); J. Berg (OR).

Project Management Team - M. Scroggins (SAR Senior Director of Operations, KY); M. Pitzer (SAR Chief Technology Director, KY); M. Tomme Sr. (SAR PG & Project Manager, GA); E. Krueger (NY); J. Osbourn (MO); J. Toon (National Registrar); Gage Overton (Records Management Specialist, KY); and Bob Cohen (IT Committee Chair, TX) meet every Monday by teleconference to plan discussion with the contractor then meet every Thursday by teleconference with Staff from Mission Data to coordinate project status, communicate updates, and periodically commission new SoW's.

IT Committee Meeting: only Subcommittee meetings since Fall Leadership.

Other Service (specify): the IT Chairman participated in meetings of the Digitization Subcommittee, Patriot Records Subcommittee, and the Genealogical Research System Subcommittee, occasionally with the Website Subcommittee, as well as Strategic Planning, and National Billing Task Force. Also, the IT Chair continues to work with Staff IT to moderate messages posted to SAR Officer, especially after regular work hours and weekends.

2022-2024 GOALS:

- 1) Develop the online **members** (Blue and Purple) database for members and staff. Tweaking issues.
- 2) Online Events Registration module for satisfaction of the Congress Planning Committee. In Progress.
- 3) Revise the Online Application system into Digital Application System. SoW in intake & design of future.
- 4) Stand-alone single sign-on module to securely communicate with the database and provide True or False information to external modules. In operation in some situations.

- 5) Redesign SAR website. Completed 2020.
- 6) Receiving suggestions for designing new SAR website interface.
- 7) Re-indexing of the website search capability is high priority. Completed 2019, revised 2020.
- 8) Reorganize website content pages, improve the website design so it is responsive to desktop machines, phones, and notepads, and divide into Public and Member sites. Completed 2020.

REPORT & RECOMMENDATIONS (*include progress on goals*): The Information Technology Committee subcommittees include the Digitization, Patriot Records Committee, and Genealogical Research System Committee. Those subcommittees are chaired by Jim Faulkinbury, Stephen Hinson, and Jim Engler, respectively. Those subcommittees will continue to submit their own committee report which can be found in this report book. Each subcommittee Chairman is a Vice Chairman of the IT Committee and is reflected in the SAR Committee Report. Other subcommittee reports follow.

Progress by Subcommittees: **Member Database, SAR Website, SAR Digital Application and Events, and Vance Award Applications.**

Member Database: The leadership for this subcommittee is being provided by IT Committee Vice Chairman, J. Osbourn. The Project Manager is M. Tomme Sr. Definitions (take notice because there has been an addition and there is a future deletion, Yellow database):

Red database = Access database used by the SAR Staff

Blue database = members.sar.org

White system = www.sar.org. This refers to all of the SAR website, both public and member-only, except the databases Red & Blue.

Yellow database = memberinfo.sar.org. Has been permanently decommissioned.

Worked on or working on:

- * Application Redesign Discovery
- * Parts revised so Dual Members Chapter name appears instead of Chapter number
- * Enhancement of Blue database interface, 4 hours left, best use in planning
- * Project Manager Group meets almost every Monday to plan for the Thursday meeting with Mission Data
- * Improving synchronizing Blue database to Red database for certain fields continues
- * State and Chapter officers will update records using the Blue database
- * Jon Toon has recorded training videos to teach State and Chapter officers how to work in Blue database
- * Tying permissions to officer positions, done for some, in progress for other officer positions
- * Planning to link Tier to Role to distinguish between Chapter, State, and National offices
- * Working on dual State and dual Chapter permissions
- * Set permissions so Admin, Secretary, and Registrar, other than member, can see personal info of a member
- * Improved State reports in Blue database, reconciliation reporting cleanup
- * The revised Event system was in production for 2023 Congress Registration and Fall Leadership, completed with some bug fixes still ongoing
- * Full Patriot Ancestor list synchronizing between Red and Blue
- * Awards synchronizing between Red and Blue
- * Current SoW for digital application is in discovery, some issues corrected, 70 hours left in SoW
- * Parts of digital application are being corrected during this SoW, see separate paragraph for more information
- * Parts of current digital application corrections are being tested in "sandbox"

SAR Website and Digital Application: This subcommittee is Chaired by IT Committee Vice Chairman, J. Osbourn. The web address memberinfo.sar.org now diverts to a page on the main web server indicating that the Yellow Database has been decommissioned. This subcommittee continues documenting, through bi-weekly

video conferences with other committee chairs and subcommittee chairs, needed additions and fixes to the Online Application system so they can be put into a task list with designated priorities as we work toward a Digital Application.

Digital Application – The following items are occurring in the Digital Application Discovery:

- * Working on - application standard date of birth format of DD MMM YYYY or MMM YYYY or YYYY
- * Working on - Memorial Applications need a Death Date line
- * Working on - allowing Chapter/State Registrars to start applications and transfer ownership to applicant
- * Working on - permissions for Genealogists and Registrars
- * Permissions – State/Chapter Registrars and Genealogists treated identically in application permissions
- * Staff Genealogists met with M. Tomme, Project Manager, and J. Osbourn, Website and Database Vice Chair, at 2023 Fall Leadership to exchange ideas about the design and use of a Digital Application System.
- * Staff Genealogists meeting with M. Scroggins and E. Krueger on most Wednesday mornings to detail what features in a Digital Application would best serve their needs when reviewing applications.

Events: The Events System was in production to facilitate 2023 SAR Congress Registration at Orlando. This occurred following a number of issues being resolved during “sandbox” testing before being put into production. Some issues are appearing while in production and those issues are being resolved.

Vance Chapter and State Website Award Applications: The leadership for this subcommittee is being provided by IT Committee Vice Chairman L. Josefowski (DE). There is a report that the number of entries for each category is greater for the 2023 time period than for the previous year.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 02 February 2024

COMMITTEE NAME: Genealogical Research System Chairman: James F. Engler, Sr.
 Chairman's Address: 2038 Red River Rd., Sykesville, MD 21784 Chairman's Phone No. 443.280.7406
 Meeting Dates & Location: None

Teleconference Dates: September (14, 28); October (12, 26); November (09); December (07, 21); January (04, 18); February (01)

Committee Communications by Mail or E-Mail, Dates: September (14, 28); October (05, 11, 26); November (09, 13-17, 19, 26, 27, 30); December (06-08, 20); January (02-04, 10, 15-19, 27-29); February (01)

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at Meetings: No physical meetings since last report.

Teleconferences:

Date	J. Engler (MD)	J. Sinks (DC)	J. Faulkinbury (CA)	J. Wood (NC)	R. Cohen (TX)	G. Green (NC)	S. Hinson (OH)	C. Smithson (MD)
04 Sep 2023	x	x	x		x	x	x	x
28 Sep 2023	x	x	x		x	x	x	x
12 Oct 2023	x	x	x			x	x	
26 Oct 2023	x	x	x		x		x	x
09 Nov 2023	x		x			x	x	x
07 Dec 2023	x	x	x				x	x
21 Dec 2023	x	x	x		x		x	x
04 Jan 2024	x		x				x	
18 Jan 2024	x	x	x		x	x	x	x
01 Feb 2024	x		x			x		x

Other Service (specify):

REPORT & RECOMENDATIONS (include progress on goals):

Since the committee’s last report, the primary focus has been discussing a new assignment, reporting out on 2026 Operational Objective 1C, which states:

Objective 1C: Boost the public image of the Society as a lineage organization through technology investment and a focused marketing campaign of the Society’s genealogical resources.

- 1) *Communications Committee develop a marketing campaign plan with proposed staffing needs and partnership targets in 2022.*
- 2) *Information Technology Committee and the Library and Archives Committee accelerate the integration and building of the Patriot Genealogical Research Enterprise (Patriot Research System + Genealogical Research System + SAR Genealogical Research Library + Electronic Membership Application) for functional usage internally and externally by 2024.*

3) *Establish a business partnership with a genealogy/family history research firm by 2023 that can help enhance and market our genealogical research systems.*

--SAR 2026 5-Year Operational Plan for the 250th Anniversary (Final approved 03 Mar 2022)

The GRS chairman learned of the assignment on 07 November 2023; the committee began discussions at its meeting on 09 November 2023. While most of the GRS Committee's efforts have been focused on objective 1C2, we see 1C3 as a potential means to further the recognition of SAR as a genealogical resource in the general public.

GRS currently is involved with and monitors efforts to expand the Patriot Research System, which is covered in objective 1C2. With completion of the GRS requirements specification, the GRS Committee provided to the Trustees and EXCOM at the Fall 2021 Leadership Meeting its recommendation that the lowest risk, lowest cost approach for implementation of GRS in a timely manner was to use the PRS as a basis, and expand it to accomplish all GRS requirements. The PRS is upgrading, and we look forward to the full implementation of GRS functionality in PRS. These efforts are also related to Digitization and Online Application efforts; the chairman and several other committee members sit in on these meetings and report back progress to the rest of the committee.

In regards to 1C, the GRS Committee sees the need to enhance public recognition of SAR's genealogical resources as having great benefits to SAR. Prior to reaching out to any firms, the following considerations need to be taken (there may be others needing more discussion), which involve coordination with other SAR Committees:

- **Objectives of Partnership.** This needs to be worked out to clearly define what we want out of such a partnership, including: what metrics should be used to measure progress of the partnership, and what success looks like in terms of the metric.
- **Contributions of the Partnership.** These revolve around what goods and/or services would be exchanged between the partners, clearly laying out what each provides and any restrictions. If this involves some access to SAR Intellectual Property, there will likely need to be discussions with Legal Advisory and Genealogy Committees as well as IT and its subcommittees to make certain long-term impacts are considered.
- **Candidate Partner Identification.** Based on the objectives and contributions, there may be a variety of partners to be considered, each with their advantages and disadvantages. There is a possibility that multiple partnerships may be appropriate, with a subset of the objectives and related contributions.

The Committee has taken the approach that we need a well-defined strategy in terms of establishing a partnership and that this will take the form of a white paper to be submitted to the EXCOM to provide guidance in any and all negotiations. The current efforts towards the white paper have been involved defining the type of partnerships. We did reach out to PG Dodd to see if there was any direction on the type of partnerships; the advice was to focus on marketing and enhancing our GRS/PRS aspects. The advice from Strategic Planning Chairman Deloach, to whom our query was directed by PG Dodd, was:

"...search out and connect with one or more of the genealogy online services ..., establish a business partnership (e.g., SAR PRS/GRS is plugged into their system and vice versa), and the SAR is advertised/marketed on their systems as new source for Patriot Ancestor verification, lineages, etc...."

To those ends, the committee has been working on white paper content in brainstorming sessions. The committee has now identified the following types of partnerships:

- Marketing Only – Our name, our links
- Marketing with Access – Making index of PRS available, NO ACCESS TO DATA
- Marketing with Data – Making data available from their site
- Marketing with Application Support – Feeding data to SAR for insertion in SAR application
- Marketing with Application – Generating the SAR applications, possibly the rest of the SW for application processing
- Marketing with Sales – Generating the ordering system from PRS-stored applications and supporting documents
- Marketing with Sales and Support – Generating the ordering system from PRS-stored applications and supporting documents AND technical support for systems (use of, as well as issues w/SW itself)

We are now using these constructs to flesh out previously reported areas of the white paper: partnership objectives (what we want out of it, metrics to use, what good looks like); what SAR contributes to the partnership (and what's off the table); candidates for each type of partnership. Once these are assembled into the final draft of the white paper, we'll be coordinating with other committees and the EXCOM about steps going forward. There has been an independent effort on a partnership, to which the committee is in the process of applying the white paper framework. We have already started discussions with Compatriot Popham, who has been in discussion with Family Tree Maker as a potential business partner.

The GRS is aware that the DAR has been highly effective in furthering recognition of their organization in the general public through a number of partnerships involving historic preservation and education such as The American Battlefield Trust and The Museum of the American Revolution, but, to the best of our knowledge, has not engaged in a business partnership with a genealogy/family history research firm. The DAR model merits consideration.

It should be noted that 1C has a 2023 date for completion, which considering when the chairman was informed of the assignment, was not going to be met. The committee will strive to report out the results of the above considerations as soon as possible in 2024.

Respectfully Submitted,

James F. Engler, Sr.
Vice Chairman of the IT Committee for the GRS
Chairman, GRS Subcommittee

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT
 Filing Date: 03 February 2024

COMMITTEE NAME: Patriot Records Committee

Chairman's Address: 5863 Beech St., Andover, OH 44003

Chairman: L Stephen Hinson

Chairman's Phone No. 440-645-7322

Meeting Dates & Location: Various VTC (Zoom)

Teleconference Dates:

- PRS Subcommittee holds biweekly VTC meetings every other Tuesday.
- PRS Administrators communicate daily by email and when necessary by impromptu VTC.

Committee Communications by Mail or E-Mail, Dates: In progress daily

EXPENSES: Data storage for September 2023 – January 31, 2024 = \$200 (\$40 monthly)

PARTIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Members: G Green (NC), Genealogist General (GO Liaison); S Hinson (OH) Chairman; G Baggett (KY) Vice Chairman; E Alford (AL); T Bailey (OH); W Baker (PA); M Bowman (KS); D Boyer (AR); M Davis (AZ); J Callender (VA); D Collins (KY); C Dammann (TN); J. Engler (MD); S Gahafer (KY); M Gunn (OH); G Higgins (IT); B Hannah (AL); G Jensen (OK); B Hannah (AL); E Krueger (NY); K Mullen (VT); C Newcomer (GA); J Olive (AL), Librarian General; D Perkins (CT); D Robertson (AL); R Rouse (VA); M Scroggins (KY); D Shaul (MO); E Sutton (PA); P Walden (VA); J Wood (NC); Chris Canine (KY); Charles McMillan (MO)

REPORT & RECOMENDATIONS (*include progress on goals*):

The patriot records committee supports the **Strategic Priority: Historic Program**: commemorate people and events of the American Revolution; preserve records of the American Revolution; and support research about the American Revolution.

PROGRESS ON GOALS

In support of the 250th Anniversary remembrance, the goals for the Patriot Records Committee 2022-2023 include:

- 1-Maintain number of members linked to their patriot to 99% in the Patriot Research System. [99.5% Current]
- 2-Maintain the percentage of lineages transcribed to 99% in the PRS. [98.9% Current]
- 3-Add 40,000 of the older applications [1889-1984] to the PRS. [38,994 to date]
- 4-Add 18,000 patriot biographies to the PRS. [18,183 Since Jan 1, 2021]
- 5-Increase the number of patriot graves marked/identified to 3800. [4547 Current]

NEW FEATURES TO PRS AND IMPLEMENTATION

Erick Krueger continues to effectively add new features and modify existing features as needed. Collaboration with Genealogy Staff is increasing, and we are working on several initiatives on their behalf/requests.

Detection and Remedy of Bad Data:

In preparation for future functional enhancements, Erick Kruger and Jamie Callender have been working to develop methods for volunteers to detect and remedy *bad data* errors in transcribed lineages in the Patriot Research System. The source of *badness* could be any number of things from typos to bad information on the record copy itself. Work is divided into two areas called Error Issues and Warning Issues. Error Issues are resolvable by the transcribing volunteer and come from obvious types of errors like a generation missing from transcribed lineage or dates with 3 digits or 5 digits or applicant information missing. Warning Issues will be

resolved by publishers and require some level of evaluation and remedy – for example, ages of parents or children do not seem to be correct on application, or names include quotation marks, or a person who died prior to marriage date. The goal is to fix those issues which are clearly errors at the volunteer level and review the others to see whether it's a clerical issue within the PRS or if we need to denote them as issues with the record copy itself. Either way, this will enhance the accuracy of the data, and as such, the value of the Patriot Research System for everyone's use. The launch of the Error Issues was completed January 4, 2024. Launch of the Warning Issues is pending final testing by the Special Projects Team.

Special Projects Team Continues Work on Errors:

The Special Project Team has continued to manually correct errors like those identified in the last section. The team comprised of 12-15 volunteers led by Gary Jensen has now been working for over a year and a half to fix errors identified by Jamie Callender, who is constantly monitoring the data. To date, they have looked at and corrected 245,500 lines of data and since January 9th, 2024, have looked at 5,000 of the Warning Issues identified above during its prerelease testing. Thanks to this team who has worked hard doing very repetitive work.

Interface with NSSAR Membership System:

A member logging into the NSSAR membership system (<https://members.sar.org>) to view his membership details will be able to use a *Patriot Ancestors* tab to see applications/patriots proven since approximately 1998. (Applications prior to that date are not necessarily shown). A link within the tab will bring the member to his member detail within the Patriot Research System. This demonstrates the increasing maturity of the PRS and its continued support as we add both new and old records to the Patriot Research System, providing to the member a much more complete source of information about approved applications and their associated patriot ancestors. Erick Kruger has worked with the IT Committee and NSSAR IT vendor to accomplish this change.

Genealogy Flags:

Setting of SAR Genealogy Flags by the Genealogist General, Gary Green, and the Genealogy Staff continues to be implemented. The flags set by genealogy are defined and set only by Genealogy Staff and Genealogist General and identify patriot source or lineage problems in applications.

Addition of Applications Continues

New approved applications and older Ancestry records continue to be added to the system for volunteers to enter. Entry of record copies extend back into 1963 and translates to having the records for member number 89756 and newer in the system.

Family Search Records:

Mark Davis, working with Family Search administrators, acquired electronic copies of all patriot grave records provided to Family Search in 1990's and early 2000's and uploaded them to ShareFile. The files represent decades of compatriot volunteer work researching patriots who served in the Revolution and patriot grave sites. Records exist on 16 digitized rolls of microfilm, consisting of approximately 25,000 separate pages. As of January 31, 2024, a review of 5 rolls has been completed. Following review and organizing of the files, they will be released to a special team of volunteers to data mine the information to update Patriot Records.

Volunteer Activity:

Volunteers continue to provide a quick Patriot Record and Lineage turn around on new member applications being loaded by National Office and older (Ancestry.com) applications being loaded by Erick Kruger, as demonstrated by the 99% + completion percentages.

Training and Promotion:

Patriot Pete – PRS previously adopted a cartoon character named Patriot Pete as its mascot. A new more transportable banner style Patriot Pete has been acquired and will make its debut at RootsTech in late February 2023.

Tri-Fold Brochures – Four tri-fold brochures are available. The newest brochure is being used for recruiting new members at conventions and it combines how to become a member using PRS for support. The first three trifold covers how PRS supports other SAR programs; informing the public on how to use PRS for patriot ancestor research; and informing members on features and functions of PRS. These brochures are available in .pub, and limited quantities can be obtained from the Patriot Records Committee prs@sar.org. The trifold are available to any member or chapter holding public events, especially recruitment.

Patriot Records Committee Meetings:

No VTC meetings of the Patriot Records Committee or PRS Volunteers were held 1 August 2023 to 1 February 2024.

METRICS BY IMPLEMENTATION AREAS:

Grave Marking Medals earned as of 27 Jan 2024 – Geoff Baggett (KY), Administrator

Total Patriot Grave Marking Medals/OLCs awarded:	1000 [+120]
Total members achieving the Patriot Grave Marking Medal:	524 [+59]
C.A.R. (Non-SAR) Recipients	4 [+0]
Total members achieving the Compatriot Grave Marking Medal:	52 [+19]

*Brackets [] indicate increase since 31 Aug 2023

Application Entered/Member Linked – Performed by PRS Volunteer Team As of 01 February 2024

Description	Total Applications	+ Record Copy Available	+ Member Linked	+ Patriot Linked	% Patriot Linked	+ Lineage Entered	Percent Complete
1998 - Current: ACN listing (ACN 1+)	107,083	106,869	106,869	106,749	99.9%	106,516	99.7%
1985 - 1998: Old ACN listing (ACN 200,000+)	29,641	29,626	29,626	29,626	100.0%	29,621	100.0%
1971 - 1985: Member# 101005-125200 (Based on private Ancestry images)	28,877	28,874	28,874	28,873	100.0%	28,844	99.9%
1889 - 1970: Member# 1-101002 (Based on Public records from Ancestry.com)	14,708	14,708	14,708	13,838	100.0%	10,150	69.0%
Uncategorized Applications (Potential Duplicate and/or Invalid Entries)	347	248	248	248	100.0%	246	99.2%

Grand Total	180,656	180,325	180,325	179,334	99.5%	178,280	98.9%
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Microfilm Upload Status - Microfilm Review and Uploading Performed by Erick Kruger
As of 01 February 2024, is 69.5% Complete

Source	Total Films	Total Entered	Notes
1889-1970 from Ancestry.com	444	49	Each film represents approximately 200 members.
1971-1981 from Ancestry.com	37	43	Each film represents approximately 500-800 members.

Application Supporting Document Packages
As of 01 February 2024

Connected to Applications	Unconnected to Applications	Documentation Pages Scanned
13,737	431	296,201

Patriots and Graves
As of 01 February 2024

Total Count	With application on file	Number with Headstones	Total Headstones	Percent Known Grave Sites	Graves Marked by SAR
164,567	67,101	9376	13,763	57.5%	4658

Biographies are Edited and Published by Mark Davis, Administrator
As of 01 February 2023

Total Count	Number of associated Patriot records	Percent of Patriots with Biographies
18,183	17,412	10.6%

2023 Top 10 States Reviewed Biographies ¹		2023 Totals by District Reviewed Biographies ¹		2023 Top 6 Chapters	
VA	173	Mid-Atlantic	217	VA- Geo Washington	75
NC	95	South Atlantic	112	VA-Williamsburg	54
TN	35	Southern	62	NC- Bathabara	31
MO	31	South Central	58	LA-Philemon Thomas	28
LA	27	North Central	34	TN-Stephen Holston	25
MD	22	New England	27	MN-St.Paul	15
PA	21	Central	26		
NE	19	Non-Member ²	16		

KY	16	Great Lakes	13
MN	15	Rocky Mountain	7
		Western	7
		International	4
		North Atlantic	3
		Pacific District	2

1. More than 2,600 old biographies that predate PRS are under review and not included in these totals. Once they have been fully edited and vetted, they will be added to future counts. This process of removing duplicate biographies (same author with the same text for a single patriot) continues. We have also removed several biographies (same author with the same text for a single patriot) continues. We have also removed several biographies for copyright.
2. NON = Non-member submissions, typically from DAR authors.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT
 Filing Date: February 5, 2024

COMMITTEE NAME: Records Digitization Subcommittee

Chairman: J. Faulkinbury

Chairman's Address: 4305 Elizabeth Ave, Sacramento, CA 95821

Phone No. (916) 704-1157

Meeting Dates & Location: Various

Teleconferences since 2023 Fall Leadership: Oct 11, Oct 25, Nov 8, Dec 6; Jan 3 2024, Jan 31.

Email Communications: Various

EXPENSES: None

MEMBERS:

J. Faulkinbury (CA); G. Green (GG-GO, Liaison); J. Engler (MD); E. Krueger (NY); L. Popham (FL); W. Schwetke (VA); M. Scroggins (KY); M. Tomme (GA); J. Wood (NC); T. Van Hooser (CT); B. Cohen (TX-IT Committee Chairman).

PARTICIPATION:

B. Cohen (TX); J. Engler (MD); J. Faulkinbury (CA); G. Green (GO Liaison); L. Popham (FL); M. Scroggins (KY); E. Krueger (NY); W. Schwetke (VA); and Gage Overton (Records Management Specialist).

STATUS REPORT & RECOMENDATIONS:

The membership records of the SAR, membership applications, and the supporting documentation that accompanies those applications are organized differently in our records vault. As of January 2024, we have had nearly 230,000 members who have joined the SAR between 1889 and 2023. The records we hold are both the membership applications for all members and the supporting documentation for applications approved since about 1979, following the move to Louisville.

1. The PRS contains most of the applications from member number 90,000 and higher (approx 1963 and newer). Erick Krueger is working on digitizing the next batch of older record copies back to member number 80,000 (approx 1955).
2. In June 2023, our new Digitization Specialist was hired and began training on the scanning equipment, and during his training, the equipment required an upgrade and relicensing which was completed the last week of June 2023. On December 8, 2023, the scanner suffered a broken part requiring a replacement order from the factory which was installed on January 9th putting the scanner back into operation the next day. During the 7 months of scanner operability, from July 1st through January 2024, our Digitization Specialist has scanned about 158,000 documents starting alphabetically with patriot surname folders beginning with "Ba". As of January 31st, the folder for patriots Breckinridge thru Breese is being worked on. Note that the folder for patriots with surnames in the "B"s represents about 11% of the total and when done. Along with the folders for the "A"s, which were previously completed, when the "B"s are scanned, about 15% of the total number of the supporting documents will have been scanned. NOTE: We were originally led to believe that the vault only contained supporting documents back to -1978. As the digitization of those files has occurred and the linking of them to applications, we're finding existing records from decades earlier than we thought. All of these are available in the PRS as they are digitized. We currently have around 400 files from earlier time periods awaiting their respective record copies to be digitized. While some have questioned the value of the earlier

applications, these application bundles definitely increase the value for our Genealogy Staff and others.

3. Funding for a contract to house our scanned records in an environmentally controlled storage location has been authorized. When we need to move those records out of the building to make room for the start of installation activities for our museum/education center, and once we have organized the boxes of documents which, in addition to our scanned applications and supporting documentation, also includes other scanned organizational records, the contract will be put in place.

Respectfully Submitted,

Jim L.W. Faulkinbury
Vice Chairman, IT Committee
Chairman, Records Digitization Subcommittee

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 02/05/2024

COMMITTEE NAME: INVESTMENT Chairman: Robert Stevens (2023)/James Klingler (2024)

Chairman's Address: 6993 Winter Ridge Lane, Castle Pines, CO 80108 Chairman's cell # 720 527 3267

Meeting Dates & Location: September 22, 2023, at 8:45 am meeting of the Finance, Budget, and Investment Committees at the Brown Hotel, Louisville, KY.

Teleconference Dates: Zoom meeting dates: 01/19/2023, 05/25/23, 09/05/2023, 01/30/2024

Committee Communications by Mail or E-Mail, Dates: Quarterly Investment Reports, IPS Review, Portfolio allocations updates, Capital Market Analysis Reviews, Investments reviews, two review dates, one in-person open meeting, two Zoom meetings since Congress 2023, communication emails from our investment counsel on October 11, 2023, and November 9, 2023.

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name, and state):

Attendance at Meetings:

1. January 30, 2024, Zoom meeting with the committee and Helen Webb, Betty Rapp (5th/3rd), and committee members: R Stevens (CO); J Klingler (CA); M Elston, (VA) TG; Megan Krebs, SAR Finance Director; J Thomas (VA); S Powell (NC); N White (TX). The advisors informed the committee regarding investment performance, allocation, and outlook for the markets in general. The committee agreed with the recommendation of 5th/3rd to increase the target range for equities from 57% to 59% and decrease the target range for fixed income from 34% to 32% in the IFA account, and voted to recommend the change to the EXCOM.
2. September 22, 2023, meeting of the Finance, Budget, and Investment Committees at the Brown Hotel, Louisville, KY: J Klingler (CA); M Elston, (VA) TG Ex-Officio; S Powell (NC); N. White (TX).
3. September 6, 2023, Zoom meeting with the committee and Helen Webb, Betty Rapp (5/3rd), and committee members: R Stevens (CO); J Klingler (CA); D Addington (TN); Megan Krebs, SAR Finance Director; Edmon McKinley (AL) for the George Washington Fund; J Thomas (VA); S Powell (NC); N White (TX). The advisors informed the committee regarding investment performance, allocation, and outlook for the markets in general.
4. July 18, 2023, in-person meeting combined with the Finance and Budget Committee to interface with interested parties. R Stevens (CO) and J Klingler (CA) fielded questions from members regarding portfolio allocation and details regarding the distribution approved to update the office area.
5. May 25, 2023, Zoom meeting with the Investment Committee: R Stevens (CO); D Addington, SG (TN), J Klingler, Vice Chair, (CA), G Pettett, (AZ); S Powell (NC); D Billings (AL); J Thomas (VA); Megan Krebs, SAR Finance Director; Edmon McKinley (AL) for GWF. The purpose of this meeting was to discuss market conditions and expectations. Betty Rapp from 5/3 Bank presented, discussing performance figures year-to-date and their outlook. Also, a discussion was made regarding bank failures and the financial status of 5/3 Bank.

6. March 3, 2023, Investment Committee meeting at Fall Leadership presentation by 5/3 Bank with open questions from the floor. Performance reports and investment detail booklets were available, but the go-forward intention of the Committee is to only disseminate these items in electronic format in the future to save on time and printing costs, as well as make the information more available and digestible. Searchable PDF files will create this opportunity and be a huge value-add.
7. On March 4, 2023, the Investment Committee received approval from the Trustees for the portfolio allocation and benchmarking changes. Details follow.
8. January 19, 2023, Zoom meeting with 5/3 bank: R Stevens (CO) Chair; J Klingler, (CA) VC; S. Powell (NC); TG D. Addington (TN); M. Krebs, SAR Finance Director; Helen Webb, 5/3rd Bank; Elizabeth Rapp, 5/3rd Bank. Discussions began with market assumptions and volatility expectations. Our advisors estimated that the rates might go higher, but certain areas are becoming attractive. Discussion about possible recession indicated that while it looked possible, certain areas of the economy continued to show strength. Our assets improved at the end of the year, but we did not fully participate in the rally because the rally was energy-heavy. Some of the larger gainers were lower-quality equities, and our portfolios only invest heavily in those areas. While our losses for the year were sizable, we were advised to maintain our long-term outlook. Additional rate hikes by the Fed are expected. Recession is possible for the first two quarters of the year. The performance statistics are discussed in detail below. Allocation shifts and benchmarking changes were recommended for the GWEF and the IFA accounts.

Other Service (specify): Actions between meetings to further the committee's work. Review at least quarterly investment reports from Fifth Third Bank and participate in email and telephone communications with financial advisors at Fifth Third Bank. Also, communicate with Fifth Third Bank when and if market conditions or special risks are identified. The market volatility during the Fall of 2023 predicated several communications and updates via email.

REPORT & RECOMMENDATIONS

Committee Actions:

- (1) Annual Review of Investment Policy Statement (IPS) at Spring Leadership (IPS Section II page 3 item D). The IPS charges the Investment Committee to review the IPS at least once per year. The Committee conducted the Policy Review between the Fall 2023 and Spring 2024 Leadership Meetings. The Committee reaffirmed the Investment Policy Statement (14 pages) adopted by the Trustees on July 20, 2014. The committee agreed with the recommendation of 5/3rd to increase the target range for equities from 57% to 59% and decrease the target range for fixed income from 34% to 32% in the IFA account, and voted to recommend the change to the EXCOM.
- (2) Performance Review. The Investment Committee reviewed the investment results in the light of appropriate standards of performance; reviewed the manager's key investment decisions, rationale and future results; and discussed the manager's outlook, likely investment decisions, and future results.
- (3) Target Asset Allocations and Ranges (Investment Policy Statement Appendix A Operating Guidelines). The NSSAR has five investment pools: the NSSAR IFA (also described as SARF below), GWE Fund, EC&M Fund, Roger Ruth Fund, and the NSSAR Restricted Fund (NRF) investments are managed in accordance with the Investment Policy Statement (IPS) adopted by the Board of Trustees July 20, 2014, and were updated and approved at Fall Leadership 2023. The IPS's Section IV Portfolio Investment Policies (pp. 8-14) and Appendix A Operating Guidelines (pp. 14-19) identify the target asset allocation and range for each asset class or

investment strategy together with applicable guidelines and restrictions. The IPS calls for the Trustees to vote on asset allocation at least annually. This vote occurs at the Spring Leadership meeting. At each Leadership meeting, the Fifth Third Bank financial advisors meet with the GWEF Board, and the joint meeting with the Investment, Finance, Budget, and Audit committees.

The NSSAR IFA, GWE Fund, EC&M Fund, Roger Ruth Fund, and the NSSAR Restricted Fund (NRF) Asset Allocation Targets and Ranges are approved by the Executive Committee and the Trustees at the Spring Leadership meeting. The NSSAR IFA, the NSSAR Restricted, and Roger Ruth are considered “Moderate Growth” overall risk profile of 60% equity and 40% fixed income within the portfolio. The GWEF allocations will remain at the “Balanced” risk profile of 50% fixed income and 50% equities. These allocations for the SAR Funds are designed to position the portfolios for the next market cycle and to increase the probability of meeting the spending needs and long-term objectives of the NSSAR. In addition, a new, more conservative 30% Equities & 70% Fixed will be considered for the Education Center and Museum Fund. This new break-out allocation is because the deposits and withdrawals will be frequent over the next four years, and the investment horizon will be short-term, unlike our other long-term investments. The advisors recommended a change in benchmarking for the GWEF to the Russell 1000 value index for equities and the Bloomberg Intermediate Government for its fixed-income holdings, since both indexes better mirror the holdings in the fund. The Trustees approved the shift in allocation and benchmarking at Fall Leadership 2022.

(4) Investment Spending Policy. The Investment Policy Statement’s Section IV sets forth the SAR’s Investment Spending Policy of 4 percent plus or minus 2 percent of the average of the three previous years’ beginning endowment values (Investment Policy Statement, Page 10). In January each year, the NSSAR Director of Finance, with the assistance of Fifth Third Bank advisers, will apply the factors outlined in the Spending Policy to calculate the amount available for appropriation for the following calendar year and report to the Investment Committee before the Spring Leadership Conference the findings and recommendation. Note that the George Washington Endowment Fund has a donor-restricted unique consideration: no more than 80% of the net income from the GWEF may be spent in any year, and the remaining 20% is reinvested into the corpus of the GWEF.

The Committee recognizes the need for flexibility in the spending rates for the NRF, as requested by the donors. The Youth Awards and American History Teacher Awards sub-accounts will have different spending needs in this relatively small fund. In the near future, after the fund grows to a value exceeding \$200,000, we will suggest a steady spending rate commensurate with the expected performance.

(5) The January 19, 2023, Zoom meeting with the Committee and 5/3rd Advisors involved discussion and approval of an allocation for the IFA from 59% equities to 57% and from 32% to 34% for fixed income due to a combination of attractiveness in the bond market as well as our ongoing commitment to risk management and investment quality. The cash portions of the portfolio for the EC&M, which is high (target 50%), have done quite well, with the 90 T-Bill yielding 4.1%.

(6) The September 6, 2023, Zoom meeting with the Committee and 5/3rd Advisors discussed performance and market conditions. The portfolios have recovered nicely this year, with aggregate gains across the five portfolios of \$1,019,858 and an estimated yield of \$383,559.40. The portfolio recovery is a testament to our long-term investment strategy.

The Benchmark Investment Spending Rate is the Average Annual Effective Spending Rate for U.S. College and University Endowments and Affiliated Foundations with Endowments Under \$25 million as reported annually in the NACUBO-Common Fund Study of Endowments (NCES). For the last five years, the benchmark investment spending rate has ranged from 3.8% to 4.5%, while our investment spending rate has ranged from

0.78% (GWEF low) to 10.9% (SARF high). Over the last five years, we have spent over 2.5 million dollars from investments to advance SAR’s mission.

The Committee discussed the target investment spending rate for 2023 (4%). Fifth Third Bank’s Betty Rapp told the Committee the Moderate Growth portfolio’s 2023 capital market assumptions five years (2022-2026) forward-looking weighted annualized rate of return near the 2021 rate of 4.18%. The Balanced GWF portfolio forward-looking weighted annualized rate of return is also near the 2021 rate of 3.38%. The Traditional Moderate Growth NRF forward-looking rate of return is also near the 2021 rate of 3.89%. The Fifth Third Research Team is reluctant to give specific 2023 numbers because of increased volatility and uncertainty. Other investment firms are also reluctant to forecast 2023 and have downscaled their forecasts. The Committee reaffirmed the investment spending rate of 4% for 2022 for the three SAR Funds. Markets’ growth is expected to continue at lower rates for the next two years, with significant uncertainty.

For 2023, the three-year average beginning endowment value for the NSSAR IFA for 2019, 2020, and 2021 is \$8,671,280. Applying the 4% investment spending rate projects that \$346,851 will be available for budgeting annually during 2022-2026. The Investment Committee will discuss the projection for 2023-2027 at the Fall 2023 Leadership meeting.

The Committee views the 4% spending rate as a cap. For budgeting purposes, the funds in the SAR Foundation will have to be disaggregated (31 Funds) to determine the dollar amount of each Special Purpose Fund that will be available for appropriation. This disaggregated summary is in the monthly financial statement for SARF.

The Building and Outreach Education Fund has a special provision for purposes of calculating the income available. The provision defines income as interest, dividends, and realized gain. For example, income will be determined based on a calendar year, so the income certified for the calendar year 2022 will be available for the Trustees to consider in the Fall 2023 Trustees meeting to be spent during the calendar year 2024. Any income not spent in a calendar year may roll into the next year and be available for that year. Hence, the amount that may be expended may be more or less than 4% of the average of the previous three years’ beginning-period endowment values.

Portfolio Performance Objective

We seek to exceed the “blend of benchmarks” over 5-year rolling periods with the volatility of returns less than or equal to 105% of the strategic benchmark.

The Fifth Third Bank Investment Advisors provided a written report, *Investment Review*, December 31, 2023, for the SAR Foundation, the NSSAR George Washington Endowment Fund, and the NSSAR Restricted Fund. In addition, the Advisors and the Committee reviewed performances for the **YTD and 5YR as of December 31, 2023:**

FUND	NSSAR IFA	GWF	NRF	EC&M*	RR*
YTD	15%	5.3%	15.8%	9.0%	17.4%
Benchmark	15%	8.2%	15.3%	10.1%	15.3%
5 YR	8.1%	5.1%	8.1%	--	--
Benchmark	8.0%	6.1%	8.0%	--	--

* *EC&M and RR were not established until June 2022. Since inception, the EC&M fund has increased 6.4% vs. the benchmark of 7.6%, and the RR fund has gained 10.9% vs. the benchmark of 10.7%.*

Portfolio Asset Allocation Objective

We use a 60% equity and 40% fixed income risk/return profile seeking long-term total return by utilizing a broadly diversified portfolio of individual securities, mutual funds, and exchange-traded funds (ETFs). By-Law 23 Section 2(c) requires a minimum of 50 percent of the George Washington Endowment Fund to be invested in obligations of the U. S. Government or agencies of the U. S. Government whose obligations are guaranteed by the full faith and credit of the U.S. Government or in mutual funds that are invested exclusively in obligations of the U. S. Government or agencies of the U. S. Government or in mutual funds that are invested exclusively in obligations of the U.S. Government. As discussed in this report, the committee approved a recommendation to shift the allocation from 57% to 59% for equities and 34% to 32% for the IFA.

Portfolio asset allocations are consistent with the targets and ranges in the 2021 investment policy statements for the SAR Foundation funds and the George Washington Endowment Fund.

Asset Class	IFA		GWEF		NRF		EC&M		RR	
	Target	12/31/23	Target	12/31/23	Target	12/31/23	Target	12/31/23	Target	12/31/23
Cash and Equivalents	3%	2.3%	0%	2.56 %	3%	1.15%	50%	57.43%	3%	5.96%
Fixed Income	34%	33.99%	50%	54.79%	37%	36.63%	20%	15.67%	37%	35.31%
Equities	57%	57.59%	50%	39.88%	60%	59.04%	30%	25.13%	60%	58.73%
Real Estate	3%	3.21 %	2.92%	2.77%	0%	3.17%	0%	1.77%	0%	0%
Alternative Strategies	3%	2.89% %	0%	0%	0%	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

For the NSSAR Restricted Fund (NRF) and the SARF Roger Ruth, each as a starting investment allocation, the relatively small sub-account values will be combined into a pool and invested in mutual funds structured as a moderate growth allocation of 60% equities and 40% fixed income.

Market Value of Investment Portfolio – Year-End Un-Audited

The NSSAR external auditors (Dean, Dorton, Allen, & Ford) reported the NSSAR total assets as of December 31, 2022, of \$26,506, of which investments were \$14,796,477+. Accordingly, the components of all NSSAR Investments as of December 31, 2023, at Fifth Third Bank are as follows:

NSSAR IFA	\$ 9,255,844
GWEF	\$ 2,717,422
NRF	\$ 124,152
EC&M	\$ 1,883,160
RR	\$ 96,987
TOTAL	\$14,077,565

As reported by Fifth Third Bank between December 31, 2023, March 31, 2023, and values as of July 31, 2023, net of fees, values of investment components changed as follows:

Market Value of Investment Portfolio – Year to Date

<u>Market Value</u>	<u>IFA</u>	<u>GWEF</u>	<u>NRF</u>	<u>SARF</u>	<u>EC&M</u>	<u>RR</u>	<u>Consolidated</u>
03/31/2023	\$8,920,625	\$2,530,001	\$113,282	--	\$1,741,684	\$87,670	\$13,393,262
07/31/2023	\$9,317,283	\$2,609,925	\$128,434	--	\$1,832,849	\$93,786	\$13,982,277
12/31/2023	\$9,255,844	\$2,717,422	\$124,152		\$1,883,160	\$96,987	\$14,077,565
Gain (loss)	\$ 335,219	\$ 187,421	\$ 10,870	--	\$ 141,476	\$ 9,317	\$ 684,303

+ *The difference in values is due to accruals.*

* *The values include contributions, distributions, and changes in the markets. We maintain a long-term investment horizon of 5+ years, even though we have lost YTD. The decline due to market conditions aligns with the benchmark indices, sometimes less.*

Estimated Annual Income and Yields

FUND	Est. Annual Income	Yield	As of Date
NSSAR IFA	\$196,742	2.13%	December 31, 2023
GWEF	\$ 76,658	2.82%	December 31, 2023
NRF	\$ 2,979	2.4%	December 31, 2023
EC&M	\$ 77,7525	4.13%	December 31, 2023
RR	\$ 2,305	2.38%	December 31, 2023

Investment Spending Policy. The Uniform Prudent Management of Institutional Funds Act (UPMIFA) encourages nonprofit organizations to establish a spending policy based on the total assets of the endowment fund and the expected total return from income, and the appreciation of investments, whether or not realized. Our Society's investment spending practices have varied relative to the Benchmark Spending Rate from NACUBO. During the last five years, the SARF exceeded the benchmark to meet the Education Center requirements. In the previous five years, the SARF has spent \$2,455,131 to advance SAR's mission. Over the last five years, the GWEF has spent \$150,847, which could have been increased and still met the unique distribution requirements. The new NSSAR Restricted Fund initially requires a flexible spending policy. As this fund grows over the next three years, the investment and spending policies will become similar to the current SARF policies. The Youth Awards portion of NRF targets 4% in spending.

Historical Data

Date	Balance at Beginning of Year	Investment Earnings During Year	Invest. Earnings Rate	Spending During Year	Effective Spend Rate	Benchmark Spending Rate	Spending Below Benchmark
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NSSAR Restricted

1/1/2018	-	\$ 720	1.00%	\$ -	N/A	N/A	N/A
1/1/2019	95,668	9,730	10.53%	\$ 16,820	18.20%	N/A	N/A
1/1/2020	92,433	9,600	10.39%	\$ -	0.00%	N/A	N/A
1/1/2021	102,033	10,464	10.26%	\$ 3,375	3.31%	N/A	N/A
1/1/2022	112,496	(17,531)	-15.58%	\$ 3,737	3.32%	N/A	N/A
1/1/2023	110,554			\$ 23,932			
SAR Foundation (Before 07/01/2022)							
1/1/2010	4,046,934	\$ 250,035	6.18%	\$ 120,250	2.97%	3.5%	21,393
1/1/2011	4,207,869	29,652	0.70%	122,325	2.91%	3.7%	33,366
1/1/2012	4,146,072	441,279	10.64%	125,188	3.02%	3.7%	28,217
1/1/2013	5,303,994	557,635	10.51%	150,886	2.84%	4.1%	66,577
1/1/2014	5,795,527	256,155	4.42%	163,805	2.83%	4.6%	102,789
1/1/2015	7,449,877	(217,352)	-2.92%	288,496	3.87%	4.5%	46,748
1/1/2016	7,189,548	403,184	5.61%	319,247	4.44%	3.8%	(46,044)
1/1/2017	7,408,408	1,106,829	14.94%	460,121	6.21%	4.0%	(163,785)
1/1/2018	8,612,994	(534,747)	-6.21%	234,430	2.72%	4.1%	118,703
1/1/2019	8,059,644	1,508,736	18.72%	882,641	10.95%	4.1%	(552,196)
1/1/2020	8,910,711	874,927	9.82%	495,500	5.56%	4.1%	(130,161)
1/1/2021	9,658,070	1,238,074	12.82%	382,439	3.96%	4.1%	13,542
1/1/2022	11,867,271	(1,734,522)	-14.62%	122,766	1.03%	4.1%	363,792
6/30/2022	10,112,238			\$ 3,745,329			\$ (460,851)
NSSAR Invested Funds (Start July 1, 2023)							
7/1/2022	8,699,719	\$ 79,418	0.91%	\$ 227,319	2.61%	4.1%	129,370
1/1/2023	8,687,020			\$ 227,319			\$ 129,370
Education Center and Museum (Start July 1, 2023)							
7/1/2022	1,329,482	\$ 9,503	0.71%	\$ -	0.00%		-
1/1/2023	1,625,740			\$ -			\$ -
Roger Ruth Endowment (Start July 1, 2023)							
7/1/2022	83,037	\$ (108)	-0.13%	\$ -	0.00%		-
1/1/2023	82,929			\$ -			\$ -
George Washington Endowment Fund							
1/1/2010	1,106,170	60,094	5.43%	18,007	1.63%	3.5%	20,709
1/1/2011	1,194,009	14,530	1.22%	16,009	1.34%	3.7%	28,169
1/1/2012	1,238,117	90,278	7.29%	14,504	1.17%	3.7%	31,306
1/1/2013	1,379,527	138,966	10.07%	10,642	0.77%	4.1%	45,919
1/1/2014	1,576,148	92,896	5.89%	23,764	1.51%	4.6%	48,739

1/1/2015	1,685,200	(22,363)	-1.33%		13,103	0.78%	4.5%	62,731
1/1/2016	1,681,671	56,890	3.38%		20,136	1.20%	3.8%	43,767
1/1/2017	1,747,346	209,553	11.99%		21,775	1.25%	4.0%	40,868
1/1/2018	1,980,927	(79,907)	-4.03%	\$	30,951	1.56%	4.1%	50,267
1/1/2019	1,924,924	287,078	14.91%		25,579	1.33%	4.1%	53,342
1/1/2020	2,279,243	233,309	10.24%	\$	33,501	1.47%	4.1%	59,948
1/1/2021	2,556,138	230,132	9.00%	\$	31,824	1.24%	4.1%	72,978
1/1/2022	2,826,870	(334,665)	-11.84%	\$	31,904	1.13%	4.1%	83,998
1/1/2023	2,540,779							
				\$	291,698		\$	558,744

SOURCE: Megan Krebs, NSSAR Director of Finance, February 10, 2023

Investment Earnings equal investment interest plus dividends plus net capital gains or losses, both realized and unrealized, minus investment fund management fees.

² The Benchmark Spending Rate is the Average Annual Effective Spending Rate for U.S. College and University Endowments and Affiliated Foundations with Endowments Under \$25 million as reported annually in the NACUBO-TIAA Study of Endowments (NTSE). The 4.1% is the spending rate for 2021.

³ In 2012, the Fifth Street Endowment Fund was created. Its value on 01/01/2013 was \$778,247; on 01/01/2014, it was \$860,481. No distribution was made from it during 2012, 2013, and 2014. See Note 5 below.

⁵ The proceeds from the 2014 sale of the 4th Street property were combined with the 5th Street Endowment Fund to form the Building and Outreach Education Endowment Fund, which had a balance 1/1/2016 of \$1,919,414 on 1/1/17 of \$1,956,762 and 1/1/18 of \$2,255,382.

Respectfully submitted:



Robert Stevens
Chair, Investment Committee (July 2023-December 2024)

James Klingler
Chair, Investment Committee (January 2024-July 2024)

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 1 February 2024

COMMITTEE NAME: Ladies Auxiliary Liaison Chairman: George Strunk
Chairman's Address: 205 Goldleaf Dr., Goldsboro, NC 27534 Chairman's Phone No. (919) 738-6428
Meeting Dates & Location: 22 September 2023 (Fall Leadership Louisville, KY)
Teleconference Dates: None
Committee Communications by Mail or E-Mail, Dates: 10/4/23; 10/16/23; 1/30/24
EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at Meetings: G. Strunk (NC); R. DeVenney. Jr. (MO); D. Elam (FL); W Popham, Sr. (FL)
Guests: P. Wilson-Perkins (CT); B. Osbourn (MO); C. Weissinger (WA); B. Chaffin (TN); M. Addington (TN); and D. Hulse (KS).

Teleconferences: None

Other Service (specify): Emails - 10/4/23, Russ Devenney; 10/16/23, Becky Moyer and Pat Perkins; 1/30/24, Russ Devenney.

REPORT & RECOMENDATIONS (*include progress on goals*):

As Chairman of this Committee, I attended the Ladies Auxiliary meetings at Congress and Leadership along with great participation by the auxiliary at our committee meeting at Leadership. The number of Ladies Auxiliaries is growing, and their support of Leadership and National Congress is superb. Compliance with directives regarding institution, tax and solicitation regulations is being researched and emphasized to ensure that all auxiliary chapters are in good standing. The National Board is working with this committee and receiving legal advice regarding how to proceed. We expect that with conversation and explanation, the auxiliaries will make appropriate changes to conform with all pertinent directives.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: January 30, 2024

COMMITTEE NAME: LEGAL ADVISORY COMMITTEE

Chairman: Gregory D. Lucas

Chairman's Address: PO Box 1931, Bellevue, WA 98009

Chairman's Phone No. (425) 454-3302

Meeting Dates & Location: 01 September 2023 (Zoom)

Teleconference Dates: 06 September 2023 (Telephone)

Committee Communications by Mail or E-Mail, Dates: 31 August 2023; 06 September 2023; 20 September 2023; 07 September 2023; 08 September 2023; 09 September 2023; 10 September 2023; 12 September 2023; 13 September 2023; 16 September 2023; 17 September 2023; 20 September 2023; 21 September 2023; 25 September 2023; 26 September 2023.

EXPENSES: N/A; the Committee does not anticipate incurring costs at this time.

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

G. Lucas, Chair (WA); M. Elston (VA); D. Appleby (MO); M. Brennan (VA); R. Bryant (MO); E. Butler (TX); R. Duncombe (VA); R. Haines (CO); R. Hack (MO); T. Lawrence (TX); G. Ohanesian (SC); D, Schrader (DE); N. White (TX); T. Pounders (TX).

Attendance at Meetings: G. Lucas, Chair (WA); E. McKinley (AL); R. Duncombe (VA); G. Ohanesian (SC); D, Schrader (DE); N. White (TX).

Teleconferences:

REPORT & RECOMENDATIONS (*include progress on goals*):

The Committee was recently tasked with providing recommendations prior to Fall Leadership on the use of its eagle logo and, in particular, circumstances not adequately addressed in the current Branding and Engagement Guide.

After extensive discussion of the issues, the Committee provided recommendations on the following:

- (a) Use of the logo in conjunction with a co-branded logo from a third party (profit or non-profit);
- (b) Use of the logo on goods intended for sale by members of SAR;
- (c) Use of the logo on goods intended for sale by third parties in conjunction with SAR activities;
- (d) Use of the logo on goods intended for sale in connection with fundraising activities.

Upon request, the Committee was asked to tender a Motion to ExCom as to revision of the applicable section of the Branding and Engagement Guide. The Committee completed its work on the issue on September 26, 2023.

DATED the 30th day of January, 2024.

Respectfully submitted,
LEGAL ADVISORY COMMITTEE:

/s/

By: _____
Gregory D. Lucas, Chair

cc:

M. Elston (VA);
D. Appleby (MO);
M. Brennan (VA);
R. Bryant (MO);
E. Buter (TX);
R. Duncombe (VA);
R. Haines (CO);
R. Hack (MO);
T. Lawrence (TX);
G. Ohanesian (SC);
D. Schrader (DE);
N. White (TX);
T. Pounders (TX).

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: February 5, 2024

COMMITTEE NAME: Library & Archives

Chairman: James H. Maples

Chairman's Address: 1501 Elmwood Dr SE, Huntsville, AL 35801

Chairman's Phone No. 256-656-9898

Meeting Dates & Location: Fall Leadership 2023; Zoom session - January 30, 2024

Committee Communications by Mail or E-Mail, Dates: Various EXPENSES: NA

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)": J. Maples (AL); LG F. Olive (AL); J. Osbourn (MO); L. Leslie (KY); J. Griffith (AL); E. Coggins (VA); A. Finley (GA); T. Payne (KY); M. Oller (TX); D. McMurray (MO); M. Barger (NM); E. Matthews (FL); D. Roberson (AL); K. Weissinger (WA); M. Dechant (PA); S. Fields (FL); J. Forbes (KS); H. Roberts (DE); T. Vets (LA); B. Stone (AL); C. Daniels (Librarian).

Your SAR National Library: Services at a Distance

- Two days after our Zoom meeting, we lost our Librarian General and one of my very best friends, Fred Olive. Fred's passing was a massive shock to the Alabama Society and to the National Society. A celebration of Fred's life will be held at a yet to be determined date in April at the Vestavia Hills Baptist Church in the Birmingham area. Fred loved the SAR and especially the NSSAR Library. Fred was such a joy to work with and to be around. He will be missed by all.
- The new Library webpage is now live! Be sure to check it out.
- Our Library staff members will continue to add links to full-text electronic books to its online catalog as well as other pertinent links. This means you will see a growing number of books in our Library becoming available to you from your home computers. So far, over 11,300+ books are available to you.
- The Benjamin Franklin medal program for fundraising and promotion of the Library and Archives has been an outstanding success.
- Digitization of the SAR institutional archive collection effort continues and is now over 70% complete.
- As part of our 250th Anniversary project, two very high-quality display cases for the Library have been purchased. These cases have the proper glass and lighting to display items without damage. Be sure to go by the Library and check out some of the documents and artifacts that have been added to the SAR collection. Also, an historic flag display has been installed in the lobby of the Library.
- All members, Chapters, and State Societies are encouraged to become Friends of the SAR Library! A shoutout to the Georgia Society for having the most Friends of the SAR Library and to the Tennessee Society for having the second most Friends of the SAR Library.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 1 Feb 2024

COMMITTEE NAME: Medals and Awards Chairman: Paul R. Callanan
 Chairman's Address: 611 Brookstone Ct., Marquette, MI 49855 Chairman's Phone No. 7047560363
 Meeting Dates & Location: 22 September 2023, Brown Hotel
 Teleconference Dates: 14 December 2023
 Committee Communications by Mail or E-Mail, Dates: Multiple between CC and VC and other individuals

EXPENSES: NONE

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)):

Attendance at Meetings:

REPORT & RECOMENDATIONS (*include progress on goals*):

1. Actions taken by the Committee at Fall Leadership 2023:

A. Cmte de Vergennes France Trip Medal was recommended for approval. This medal will be given to the participants who attend PG Dodd's SAR France Trip next spring. Also, it is recommended that one medal set be given to the Library and Archives for the medal collection. Funded by PG Dodd.

EXCOM APPROVED

B. Battle of San Carlos Medal (MO Society) This medal set is recommended for approval. This medal will be eligible for purchase by any participant in the celebration of Fort San Carlos. The medal is recommended with approval of the reverse side changed from the 250th celebration design to the SAR Logo with the medal backing showing through rather than the white background. Funded by the MOSSAR.

EXCOM APPROVED

C. Boston Tea Party Commemorative Medal (Merchandise) is recommended for approval. It is the first in the series of the decade of the American Revolution. Medal design on the reverse will have the SAR Logo without the white background. This series will be incorporated into the order of precedence after the commemorative medals for the SAR Annual Trips. Funded and provided by the Merchandise Department.

EXCOM APPROVED

D. SAR Historic Preservation Medal (History) is recommended for approval. This is the fundraising medal to support the programs and activities that support the historical program goals of the society. Donation amount is \$250. Proceeds will be allocated to the History Committee SPOF Account. The History Committee will be responsible for the distribution and awarding of the medal set.

EXCOM APPROVED

E. Liberty Medal OLCs (Genealogy). Policy is recommended for approval. The awarding of OLCs for the Liberty Medal is being adjusted to bring that portion of the award into line with the new three levels of medals. So, a Silver OLC will replace the Bronze OLCs when a person has brought in an additional 50 members. A Gold OLC will replace two Silver OLCs when a member has brought in 100 additional members. Additionally, it is recommended that for those who are first line signers for 500 members will replace the OLCs with a Bronze Bar engraved with the number 500. The next level will be 1000 members.

EXCOM APPROVED

F. Member Neck Ribbon was proposed by the Genealogy Committee and was not recommended for approval.

NO FURTHER ACTION

2. Actions from the 14 December 2023 Meeting

A. **The 137th Annual Congress Medal** was recommended for approval with the change from the wording on the front of the medal – “137th National Congress” to “137th Annual Congress” - which is in line with the handbook. Medal will be used as a fundraiser for the 137th Annual Congress hosted by the Southern District. The medal does include symbols representing all four states of the district and the reverse has the four states in a raised engraving. The set does include both a miniature and full-size medal.

EXCOM APPROVED

B. **250th Commemorative Medal Series, First Continental Congress Medal** is recommended for approval as submitted by the Merchandise Committee. This will be in a full size and miniature medal set sold by Merchandise as the second commemorative medal in the 10-medal series currently planned. Funded by Merchandise and is a fundraiser for the Merchandise Department. This medal can be purchased by anyone who wants one not restricted to members.

EXCOM APPROVED

C. **The Arthur M. and Berdena Eagle Scout Gold Medal Award** is recommended for approval. Presently there is no award given to the winner except the check. This will allow the National Winner of the Arthur M. and Berdena King Eagle Scout Contest to be consistent with the other award programs for the National Winner. The medallion will be suspended from a red, white, and blue neck ribbon and have the SAR Logo with the wording Arthur M and Berdena King Eagle Scout Contest on blue around the logo. The reverse will be suitable for engraving. The medal will be funded by Eagle Scout Committee

EXCOM APPROVED

- D. **The Arthur M. and Berdena Eagle Scout Silver Medal Award** is recommended for approval. Presently there is no award given specifically designated for the winner. In the past the Eagle Statue has been awarded to the State winner. Due to issues with shipping and breakage, this statue has become more of an issue. This medal uses the existing Chapter Eagle Scout Medal as the base for the medal but casts it in silver. This will allow State Winners of the Arthur M. and Berdena King Eagle Scout Contest to be recognized with a separate award that can be worn on their uniform. Funding is provided by the Eagle Scout Committee. The committee recommended that the Eagle Statue be retired once the present numbers are sold.

EXCOM APPROVED

- E. **The Gold Good Citizenship Medal** was recommended for approval for the following individuals: PG John L. Dodd (NSSAR), Jonathan Greenblatt (ES), and Pat Scannon (CA).

EXCOM APPROVED

Respectfully submitted,

Paul R. Callanan

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: Jan 25, 2024

COMMITTEE NAME: Membership Chairman: Derek J. Brown (CA)
Chairman's Address: P.O. Box 326, Clayton, CA 94517 Chairman's Phone No. 925-285-4792 (cell)
Meeting Dates & Location: 2023 Fall Leadership Meeting (Louisville, KY)
Teleconference Dates: 9/4/23, 10/16/23, 11/15/23, 12/11/23
Committee Communications by Mail or E-Mail, Dates: Discussion notes issued following each teleconference

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at Meetings (Spring Leadership and Teleconferences): A. Akers (NH); W. Arnold (FL); D. Brown (CA); W. Brown (GA); D. Carr (TN); D. Chaffin (TN); D. Collins (KY); W. Greaf (VA); A. Greenly (DE); S. Hammack (GA); S. Hinson (OH); B. Hulse (KS); D. Jones (AL); D. Kraft (MA); E. Mathews (FL); S. Miller (AZ); G. Moyer (MD); P. Niemann (FL); T. Peterman (KS); W. Sharp (IN); C. Smith (NV); D. Temple (TX); J. Thomas (VA); J. Turley (WV); R. Vance (NM); B. Wampler (KS).

Teleconferences:

- Multiple teleconferences with Strategic Planning Committee to identify long-term (strategic) priorities.

Other Service (specify):

- None

REPORT & RECOMENDATIONS (*include progress on goals*):

- State societies should continue to avail themselves of the 3-R Guide published in the spring of 2023 and provide suggestions for improvement to the District or Membership Committee (ongoing).
- State societies and chapters were provided lists of compatriots dropped in the past five years and are using the lists to aid in recovery of inactive members. These recovery/reinstatement efforts should continue on an ongoing basis, using reports that can be generated within the blue database. These lists of inactive members were also forwarded to the International and European Districts for follow-up.
- Formed subcommittee under the Membership Committee to develop deployed military personnel recruitment efforts and identify methods to maintain retention. Actions are ongoing and long-term.
- Currently working with the Strategic Planning Committee to develop priorities and recommendations to improve membership retention/reinstatement and develop goals. These efforts will require coordination with other committees (Medals and Awards, IT, DAR, C.A.R., etc...)
- Began development of a survey to be sent to all recent (2023) dropped members to identify and quantify the reasons for dropping membership. This will allow adjustment of SAR programs, etc., as necessary to help improve membership retention.

Future goals include:

- Obtain feedback from state societies (and dropped member survey) to identify successes and adjust processes as necessary to improve membership retention and recovery/reinstatement.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: February 5, 2024

COMMITTEE NAME: Veterans Recognition Committee Chairman: COL Patrick J. Niemann, USA (ret)

Chairman's Address: 15 Timuquana Trail, Pinehurst, NC 28374 Chairman's Phone No. 813-784-1035

Meeting Dates & Location: _____

Teleconference Dates: None

Committee Communications by Mail or E-Mail, Dates: _____

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)":

REPORT & RECOMENDATIONS (*include progress on goals*)

1. 2024 budget request for \$2,500 was sent to the Budget Committee on March 9, 2023. This was followed up in a conversation with Budget Chairman McKelvie at 2023 Congress in Orlando, and the process is on-track.
- 2.. Total Certificates of Patriotism Published: 3889. This is an increase of 138 certificates since the last report.

Certificates of Patriotism Presented:

Certificates of Patriotism by Veterans Corps:

Spanish-Amer.War	1
WWI	7
WWII	653
Korea	337
Vietnam	874
SW Asia	491
Special Ops	200
Military Service	1326
TOTAL	3889

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 02/05/2023

COMMITTEE NAME: Younger Members Committee Chairman: Rev. Andy Akers
 Chairman's Address: 6 Meetinghouse Ln, New Hampton, NH 03256 Chairman's Phone No.: (603) 393-0620
 Meeting Dates & Location: 9/27, 11/20, 1/15
 Teleconference Dates: N/A
 Committee Communications by Mail or E-Mail, Dates: Numerous e-mails, text messages, and social media

EXPENSES: _____

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at Meetings: **Chairman** – A. Akers (NH); **Vice Chairman** – J. Vink (IN); **Ex-Officio** – A. Greenly (DE); **Advisor** – K. Mullen (VT); V. Cole (AZ); S. Elliott (CA); M. Gallagher (DE); C. Green (NC); J. Guerrier (OH); B. Lewis (NH); P. Ossou (NJ); M. Watson (IN)

Members: **Chairman** – A. Akers (NH); **Vice Chairman** – J. Vink (IN); **Advisor** -K. Mullen (VT); **Ex Officio** – A. Greenly (DE); J. Brock (NC); A. Bruggeworth (SC); V. Cole (AZ); C. Le Court de Beru (FR); S. Elliott (CA); M. Gallagher (DE); J. Guerrier (OH); B. Lewis (NH); C. Green (NC); P. Ossou (NJ); M. Watson (IN)

Teleconferences:

Other Service (specify):

REPORT & RECOMMENDATIONS (*include progress on goals*):

The Committee's primary goal is to support and assist the society at all levels with the recruitment of younger membership. As such, this Chairman has been working with the Membership Committee in development of its recruiting/retention products. All of our committee members continue to network with their respective state societies and chapters. Last September, we donated \$194.25 worth of organizers to the SAR Library for use at the new Preservation Workstation. Our 250th coin has been made by the Pin Center and was approved by the Merchandise Committee. It is now for sale on the 250th merch website. We are currently beginning two new joint projects: one with the Education Committee, which will be to develop programs for students, specifically those interested in History, such as hosting speakers or book tours in person/on campus or digitally. The second project will be with the Members Training Committee, in which we will develop an orientation video for Younger Members.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: February 1, 2024

COMMITTEE NAME: Museum Board

Chairman: M. Kent Gregory, Ed.D.

Chairman's Address: 3822 Denwood Ave., Los Alamitos, CA 90720

Chairman's Phone No. (562)826-7804

In-person Meeting Date: September 21, 2023

Teleconference Meeting Date: October 11, 2023; December 5, 2023; January 30, 2024.

Committee Communications: E-mails to entire Museum Board at least monthly. Multiple e-mails and phone calls between Chairman, Vice Chairmen, and SAR staff as needed.

EXPENDITURES from Museum Board Special Purpose Fund, all from donations:

- \$ 1,200.00 to Liliana Damasceno for 1770 Pennsylvania carved wooden stay busk
- \$ 13,000.00 to Liliana Damasceno for short saber with scabbard owned by Capt. Simon Marston of New Hampshire
- \$ 5,087.00 to Morphy Auctions for 1779 miniature portrait of Col Archibald Campbell, by John Bogle
- \$ 895.00 to Jim Bode Tools for a molding plane made by John Walton of Reading, Massachusetts
- \$ 450.00 to Liliana Damasceno for a 1774 sermon by Samuel Langdon, printed by Daniel Fowle
- \$ 660.00 to Liliana Damasceno for a horn and wooden gunpowder container
- \$ 230.00 to Logan Tack for a 1774 Maryland Colonial two-dollar note
- \$ 325.00 to West Sea Company for an 18th Century American navigator's parallel rules
- \$ 1,500.00 to Sarasota Numismatics for a 1776 Georgia 3-pence note
- \$ 820.00 to Jim Bode Tools for an astragal molding plane made by Abraham Fisk, and a molding plane made by Benaiah Dean of Massachusetts
- \$ 695.00 to Antiques Associates for a pipe kiln and clay pipes
- \$ 345.95 to Fagan Arms for a Worcester porcelain bowl, c. 1770 – 1783.
- \$ 4,000.00 to Ambrose Antiques for Battle of Brooklyn powder horn
- \$ 1,000.00 to Colonial Hub for a 1780 U.S. Continental Loan Office note signed by Francis Hopkinson
- \$ 6,500.00 to Ambrose Antiques for an intact naval chain shot and an 18th Century hand grenade

PARTICIPATION:

Attendance at meetings by voting members: Chairman M. Kent Gregory (CA); Vice Chairman Paul Callanan (MI); Vice Chairman Rob Moore (HI); Jay DeLoach (NC); Scott Giltner (KY); James Klingler (CA); James Lindley (WA); Edmon McKinley (AL); Brett Osborn (VA); Sam Powell (NC); and Keith Weissinger (WA).

Non-Voting members: Historian General Brooks Lyles (NC); Librarian General J. Fred Olive III (AL); Curator Zac Distel (KY); Jim Griffith (AL); Jim Maples (AL); Don Roberson (AL); and William Stone (AL).

SAR Staff: Education Director Rae Ann Sauer and Collections Coordinator Jacob Kahler.

Guests: Sec. General Darryl Addington (SC); David Hitchcock (FL); and Brandon Villardi (CA).

REPORT & RECOMENDATIONS:

Recent Donations: The Artifact Donor Program was initiated by the Museum Board in 2019, and, to date, has resulted in adding over 350 historical artifacts valued at over \$400,000.00. Since the 2023 Fall Leadership report, historical artifacts donated or purchased for the SAR Museum Collection include:

- 1770 Pennsylvania carved wooden stay busk, funded by the Missouri Society
- Short saber with scabbard owned by Capt. Simon Marston of New Hampshire, funded by Jim and Teri Lindley

- 1779 miniature portrait of Col. Archibald Campbell by John Bogle, funded by the Curator's Discretionary Fund
- Molding plane made by John Walton of Reading, MA, funded by Jim Maples
- 1774 sermon by Samuel Langdon, printed by Daniel Fowle, funded by the SAR Chaplains Committee
- Horn and wooden gunpowder container, funded by Patrick & Billie Nieman
- 1774 Maryland Colonial two-dollar note, funded by Paul Callanan & Davis Wright
- 18th Century American navigator's parallel rules, funded by Bo Vets
- 1776 Georgia 3-pence note, funded by Kenneth Collins & the Georgia Society
- Dutch hanger sword with original scabbard, donated by Brandon & Kelly Villardi
- Astragal molding plane made by Abraham Fisk, funded by Jim Maples
- Molding plane made by Benaiah Dean of MA, funded by Jim Maples
- American fowler of Lt. Simon Vrooman, donated by Tim Ward
- C. 1720 silver christening cup from the Vrooman family, donated by Tim Ward
- Pipe kiln and clay pipes, funded by M. Kent Gregory
- Worcester porcelain bowl, c. 1770-1783, funded by M. Kent Gregory
- Intact naval chain shot, funded by Jim Maples, Edmon McKinley, Rob Moore, & Jay DeLoach
- Battle of Brooklyn powder horn dated Aug 27, 1776, purchased by the Museum Board
- 18th Century hand grenade, funded by Edmon McKinley, Ken Goodson, & Paul Callanan
- 1795 St. Vincent Black Corps copper medal, donated by Larry Mylnechuk

Accessions: Donated objects accessioned into the SAR Museum Collection since the 2023 Fall Leadership report:

1. 1770s lion's head officer's saber, funded by Kent Gregory, Jim Klingler, Mark Kramer, Dan McKelvie, and Brian Stephens in memory of James C. Fosdyck
2. "GR" cypher Westerwald Jug, c. 1720, funded by Lindsey and Billie Brock
3. "Admiral Vernon and Commodore Brown" medal, 1739, funded by Patrick Niemann
4. 1770s lion's head officer's saber with melon slice hilt, funded by Brett Osborn and Kenneth Bonner
5. Naval chain shot remnant from Chesapeake Bay, 1781, donated by John Fulwider
6. 1779 miniature portrait of Col. Archibald Campbell of the 71st Regiment of Foot, painted by John Bogle, purchased at auction funded by Curator's Discretionary Fund
7. Dutch hanger sword with original scabbard, donated by Brandon & Kelly Villardi.
8. 1770 Pennsylvania carved wooden stay busk, funded by the Missouri Society
9. Short saber owned by Capt. Simon Marston of New Hampshire, funded by Jim & Teri Lindley
10. Molding plane made by John Walton of Reading, Massachusetts, funded by Jim Maples
11. Horn and wood gunpowder container, funded by Patrick & Billie Nieman
12. American navigator's parallel rules, funded by Bo Vets
13. American fowler of Lt. Simon Vrooman, donated by Tim Ward
14. c.1720 Silver christening cup of Vrooman family, donated by Tim Ward
15. Molding plane made by Abraham Fisk, funded by Jim Maples
16. Molding plane made by Benaiah Dean of Massachusetts, funded by Jim Maples
17. Worcester porcelain bowl, c. 1770-1783, funded by M. Kent Gregory
18. 1795 St. Vincent Black Corps copper medal, donated by Larry Mylnechuk
19. Pipe kiln and clay pipes, funded by M. Kent Gregory
20. Battle of Brooklyn powder horn dated Aug 27, 1776, funded by the Museum Board
21. Intact naval chain shot, funded by Jim Maples, Edmon McKinley, Rob Moore, & Jay DeLoach
22. 18th Century iron hand grenade, funded by Edmon McKinley, Ken Goodson, & Paul Callanan

Transfers: Two-dimensional historic documents acquired by the Museum Board and transferred to the care of the SAR Library Archives since the 2023 Fall Leadership report:

1. 1777 seven-dollar Georgia note, funded by Edward P. Rigel, Sr
2. 1776 Georgia 3-pence note, funded by Kenneth Collins and Georgia Society
3. 1774 sermon by Samuel Langdon, printed by Daniel Fowle, funded by the SAR Chaplains Committee
4. 1774 Maryland Colonial two dollar note, funded by Paul Callanan & Davis Wright.

5. 1712 Vrooman Family Bible, donated by Tim Ward
6. 1838 Vrooman Family Bible, donated by Tim Ward
7. 14 original letters to and from Lt. Simon Vrooman, donated by Tim Ward
8. 7 miscellaneous documents regarding Lt. Simon Vrooman, donated by Tim Ward
9. 5 pension documents regarding Lt. Simon Vrooman, donated by Tim Ward
10. 1830s newspaper article regarding Revolutionary War pensions, donated by Tim Ward
11. 1780 U.S. Continental Loan Office note signed by Francis Hopkinson, funded by David King

Collection Management: The Collection Management subcommittee of Jim Lindley (Chairman), Rob Moore, Keith Weissinger, and Curator Zac Distel are working with Library Director Cheri Daniels to develop a disaster preparedness plan for the SAR artifacts and documents.

Conservation: The conservation work on the fowler made by Seth Pomeroy was completed by McKay Conservation Lab. It was funded by an Americana Corner grant.

SAR Magazine Articles

Editor Steve Vest of the *SAR Magazine* agreed to publish articles on artifacts donated to the SAR Collection. Education Director Rae Ann Sauer, Curator Zac Distel, and Collections Coordinator Jacob Kahler have written and submitted articles entitled *Selections from the Collection*. Each article is followed up with expanded online presentations that are archived in the www.sar.org website under the Education tab for Teachers and Students – *Selections from the Collection*. The January 17 broadcast has already had over 3,000 viewers.

Turtle Submarine Model

The Museum Board ordered a custom-built model of the Turtle submarine, based upon the 1787 letter from David Bushnell to Thomas Jefferson. Retired Admiral Jay DeLoach assisted in developing the specifications for a historically accurate model. The model is under construction.

Congreve Cannon Model

A ¼ model of a 3-pounder Congreve cannon and carriage were custom-ordered from Gillmor Ordnance (to make the barrel) and Hoffman's Forge (to make the carriage). Brooks Lyles is coordinating this project.

Uniforms for the Museum

A Uniform subcommittee was appointed for the selection of the 14 uniforms to be displayed in the Museum, recommending who to make them, determining the costs, and finding donors to sponsor the uniforms. The subcommittee includes Brooks Lyles (Chairman), Brett Osborn (Vice Chairman), Scott Giltner, Jay DeLoach, Stephen McKee, Brandon Villardi, and Curator Zac Distel.

Artifact Donor Program

The Curator has identified selected historic artifacts that are available for purchase for the SAR Museum Collection. An Artifact Donor Wish List can be found under the Museum tab on the sar.org website. Contact Museum Board Chairman M. Kent Gregory or Curator Zac Distel to make donations.

Respectfully submitted,

M. Kent Gregory, Ed.D.

Chairman, Museum Board

Sons of the American Revolution

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 04 February 2024

COMMITTEE NAME: NATIONAL DUES BILLING TASK FORCE Chairman: Wm. Lee Popham, Sr.
Chairman's Address: 7101 SW 67 Avenue, South Miami, Florida 33143 Chairman's Phone No. 305-904-4400
Meeting Dates & Location: Several online meetings with VA Member Clicks + FL Club Express implementers.
Teleconference Dates: various
Committee Communications by Mail or E-Mail, Dates: various

EXPENSES: N/A

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at several online virtual meetings since 2023 Fall Leadership Report:

National Dues Billing Task Force Membership at 2-01-2024 – Wm Lee Popham Sr.(FL),
Chairman; PG John Dodd (CA); SG Darryl S Addington (TN); TG Michael Elston (VA); PG C.
Bruce Pickette (AL); Todd Bale (KY) (NSSAR Executive Director); Megan Krebs (NSSAR Dir of
Finance); Jon Toon (NSSAR Registrar); Michael Scroggins (KY) (NSSAR Sr. Operations Director); James
Klingler (CA) Vice Chairman and *Finance Committee Chairman*; REG GEN W Allen Greenly (GA); PG
Nathan E White (TX); Robert S Cohen (TX); Harry B Roberts (DE); David Bussone (FL); James E
Osborn (MO); Stephen Renouf (CA); Dr. C David Billings (AL); Erick Krueger (NY); William
Daniel (AL); Samuel Massey (TX); Earl Matt Mathews (FL); R. Bruce Meyer (VA); Melvin L
Oller (TX); Mick Pitzer (KY) (NSSAR IT Director).

SUMMARY:

The Compatriots in Florida (2,600), Texas (3,200), and Virginia (2,200 – Member Clicks) – i.e., the top 3 SAR Membership States – have now agreed to implement our National Dues Billing system, and they are in various stages of statewide implementation. These three states comprise more than 20% of the entire SAR membership.

The SAR Budget for 2023 was \$20,000. Actual 2023 Club Express implementation expense for software set-up and consulting was less than \$4,500, only \$3,000 of which was paid by SAR out of the Budgeted funds available.

At the January 2024 meeting of the SAR Executive Committee, Club Express was designated as the preferred canned software system for implementation throughout the SAR societies.

We anticipate that more than 50% of the SAR membership will have begun implementation of Club Express in time for the 2024 Congress in Lancaster, PA.

BACKGROUND:

During the 2019 Congress, the Strategic Planning Committee recommended the formation of a task force to investigate the merits and feasibility of increasing the membership retention rate by using a National Dues Billing System.

Activities 2019 - 2021:

Of the 4,600+ deaths and drops we experienced in 2022, we believe as many as 3,000 of them were never contacted with either telephone calls or reminder notices about their dues, and probably never received anything but a “dues email,” or some other kind of “notice” in their newsletter – or maybe even nothing at all.

We firmly believe that the automation of our Dues Billing system will cause our drop rate to be cut in half overnight. Centralization of our Dues Billing and Collection system, and automation of our Dues Invoicing and Collection processes are essential elements necessary to our future financial success. Our compatriots will find it easier to be able to pay online with credit/debit/online payments, and our annual membership growth will be fueled by significant reductions in drop rates.

Proposed Processes Under Development:

The Finance Department has been cooperating with the National Dues Billing Task Force to determine how the system will be implemented. The process will involve:

1. The online invoicing of all annual dues – i.e., national, society, and chapter;
2. The collection of dues, either by credit card / debit card / and/or EFT payment (e.g., PayPal, Zelle, ApplePay, etc.), or by checks mailed to a lockbox at our bank for scanning and processing;
3. The bi-weekly (or weekly) distribution of all amounts collected on behalf of each participating society or chapter through bank ACH transfers, together with detailed reports of all distribution breakdowns; and,
4. The implementation of an automatic dues renewal billing process for future years, where online payment information is on file with our bank/payment processor. For all future automatic dues renewal charges, compatriots will be given full opt-out privileges prior to any payment processing.
5. The introduction of an “Anniversary Billing System” – where each new member’s dues year will coincide each year with the month of admission and registration as a new member – in order to eliminate the need for a 4-month (1 September - 31 December) hiatus that removes the ability to collect dues from any new members for that 1/3 of the year.

NATIONAL DUES BILLING & AUTOMATIC DUES RENEWALS TASK FORCE

National Dues Billing and Collection from HQ – online payment capability – automatic annual dues renewals – online payments to NSSAR, society, and chapter of their portions of dues collected.- simplification of manual reconciliation process.

Other non-profits of similar size and structure have reduced their membership “drops.”

Progress To Date:

The **Virginia Society** purchased and partially implemented the **Member Clicks** software, and 50% of the Virginia chapters have implemented the software for use in the 2024 dues billing cycle as a test group. Virginia has 2,200+ compatriots on the Member Clicks system.

The **Florida Society** has purchased and partially implemented the **Club Express** software, and all 34 of its chapters are installing this statewide software system, in order to run a parallel statewide 2024 dues billing cycle to either accompany or replace the manual chapter-level dues billing and collection processes. The 2,600+ Florida compatriots have now been loaded into Club Express, and all 32 Florida chapters are submitting their banking information as of this writing.

The **Texas Society** has elected to switch to **Club Express** from a statewide home-grown Access-based membership and dues database that was developed internally several years ago, the capabilities of which they fear are reaching the limits of their system. They recently evaluated both **Club Express** and **Member Clicks** in conjunction with Texas compatriot and SAR IT Chairman Robert S Cohen, and they have selected Club Express. The Texas Society is currently implementing their 3,200+ compatriots.

Together, the combined Virginia, Florida, and Texas Societies represent a total of approximately 7,700 Compatriots, or roughly 20% of the entire SAR membership.

“Next in Line” for implantation of the dues billing and collection system:

New Jersey Society; North Carolina Society; Missouri Society; Spain Society.

In addition, representatives of the following societies have expressed an interest in reviewing the results of the 2024 Cycle Beta States, with a view to implementation in time for the 2025 Dues Billing and Collection cycle:

#4 Georgia and #5 California should be next.

We would also like Ohio and the Empire State to consider the Club Express implementation process. That would give IT Committee compatriots James Osbourn and Erick Krueger a chance to get into the weeds, and to help plan and prepare for the day when our General Ledger accounting system, our Merchandise system, our National Dues Billing system, and Donor Perfect software can

become seamless with our SAR membership database. Club Express will also enable us to provide a homogenized communications template for those states and chapters that do not have effective websites and newsletters. State and chapter events and RSVP / Advance Payment modules might also become available, as they are already in use in Florida.

Stay tuned!

[ClubExpress Brochure](#) [ClubExpress Features Matrix](#) [Pricing](#)

Go to ClubExpress.com and click the blue box in the upper right corner that says “SIGNUP FOR A FREE TRIAL.”

LONGER-RANGE PLANNING:

Ideally, the Blue Membership Database should seamlessly interface with the Sage 100 SAR general ledger and accounting system which, in turn, should be interfaced with a Dues and Fees Billing and Collection module. This will be the optimal configuration for SAR, but it is several years away from becoming a reality.

In the meantime, the only current “customers” of the Sage 100 system are the state societies, and the individual chapters need to roll-up into the state results in order to be reported to NSSAR through the Sage accounting system. Until such time as the interfaces at the national level can be completed and tested, the utilization of “canned software” can speedily accomplish the automation of the Dues Billing and Collection processes at the state level.

In the Spring of 2022, the Goals and Objectives of the 5-Year Operational Plan – 2026 began to be implemented and monitored. Goal 6 calls for the streamlining of duplicative processes and the development of automated user-friendly processes to replace the duplicative manual processes currently in place. One of the Objectives of this Goal 6 is to implement a National Dues Billing and Automatic Online Renewal system by the end of Calendar 2024. Since our Sage 100 accounting system only currently accommodates Society customers, the Dues Billing Process is being implemented at the state society level. This will accomplish two things for us:

1. The “homogenized” state society automated processes should be in place by the end of Calendar 2024; and,
2. Additional time will become available for the upgrades to the Sage 100 accounting system, as well as the development of the streamlined interface between the Blue Membership Database and the upgraded Sage 100 accounting system.

Respectfully Submitted,

Wm. LEE Popham, Sr., Chairman

SAR National Dues Billing Task Force

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: February 9, 2024

COMMITTEE NAME: Public Service and Heroism Chairman: Wayne Lambert Brown, P.E.
Chairman's Address: 2062 Double Creek Drive, Powder Springs, GA 30127 Chairman's Phone No: 404.694.4609

Meeting Dates & Location: September 22, 2023

EXPENSES: Estimated cost of development and production for the 2023-2024 Public Service and Heroism Awards book is \$1,000.00.

PARTICIPATION:

Members in Attendance: J. Petres (MI) Vice Chairman; W. Allgood (SC); W. Collier (VA); B. Hannah (AL);
D. Jones (AL); K. Mullen (VT); D. Robertson (AL); R. Schofield (MO);
B. Stephens (CA); R. Wess (FL)

2023-2024 GOALS:

- A. Develop procedures to promote the 250th Anniversary of American Independence in PS&H award ceremonies.
- B. Review the process of current PS&H award descriptions and requirements for consistency where applicable.
- C. Investigate the possibility of presenting multiple awards to a Law Enforcement recipient, Fire Safety recipient, and Emergency Medical Service recipient.
- D. Design and publish a book of PS&H Commendations for the 2023-2024 award recipients and make a digital copy available.
- E. Increase public awareness of PS&H award recipients through expanded use of press releases and social media.

REPORT & RECOMMENDATIONS:

- A. Submit a plan to the chapters and state societies that will promote the 250th Anniversary of American Independence in PS&H award ceremonies and increase participation by 25%.
- B. Review of documentation and requirements for Public Service and Heroism Medals listed in PS&H literature is currently underway.
- C. Consult with the NSSAR Medals and Awards Committee and prepare the submittal form for proposed changes in multiple awards to a recipient.
- D. Collect data required to design and publish a digital book of 2023-2024 PS&H Commendations and increase participation by 10%.
- E. Submit a plan to the chapters and state societies that will expand public awareness by 20% through the use of press releases and social media.

Respectfully Submitted,
Wayne Lambert Brown, Chairman

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: January 30, 2024

COMMITTEE NAME: Strategic Planning Chairman: Jay DeLoach

Chairman's Address: 2902 Neuse River Dr, New Bern, NC Chairman's Phone No. 703-501-7205

Meeting Dates & Location: See below

Teleconference Dates: _____

Committee Communications by Mail or E-Mail, Dates: _____

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)"):

Attendance at Meetings: 9/23/23 - J. Kuykendall (TX); J. DeLoach (NC); S. Klapan (OH); B. Lyles (NC); V. Welker (KS); A. Greenly (GA); M. Elston (VA); K. Weissinger (WA); E. Matthews (FL); C. Moberg (IA); J. Engler (MD); J. Klingler (CA); W. Snodgrass (CO); E. Hoak (MA); D. Brown (CA); B. Cohen (TX); T. Jackson (TX); D. Perkins (CT); T. Bale (HQ); M. Scroggins (HQ)

10/24/23 Zoom – J. Kuykendall (TX); J. DeLoach (NC); D. Addington (NC); B. Lyles (NC); M. Elston (VA); K. Weissinger (WA); J. Engler (MD); J. Klingler (CA); W. Snodgrass (CO); E. Hoak (MA); D. Brown (CA); B. Cohen (TX); D. Perkins (CT); D. Bussone (FL); G. Green (NC); T. Bale (HQ); M. Scroggins (HQ)

11/20/23 Zoom – J. Kuykendall (TX); J. DeLoach (NC); D. Addington (NC); B. Lyles (NC); M. Elston (VA); K. Weissinger (WA); J. Engler (MD); J. Klingler (CA); W. Snodgrass (CO); E. Hoak (MA); D. Brown (CA); B. Cohen (TX); D. Perkins (CT); T. Bale (HQ); M. Scroggins (HQ)

12/18/23 Zoom - J. Kuykendall (TX); J. DeLoach (NC); B. Lyles (NC); M. Elston (VA); K. Weissinger (WA); J. Engler (MD); J. Klingler (CA); E. Hoak (MA); D. Brown (CA); B. Cohen (TX); D. Perkins (CT); D. Addington (NC); G. Green (NC); J. Griffith (AL); L. Popham (FL); J. Toon (HQ)

1/18/24 Zoom - J. Kuykendall (TX); J. DeLoach (NC); J. Engler (MD); J. Klingler (CA); E. Hoak (MA); D. Brown (CA); B. Cohen (TX); D. Perkins (CT); G. Green (NC); D. Van Hoof (MI); L. Popham (FL); P. Callanan (MI); A. Akers (NH); M. Scroggins (HQ); J. Toon (HQ)

Other Service (specify): 9/21/23 EXCOM – J. DeLoach (NC); 11/29/23 EXCOM – J. DeLoach (NC); J. Kuykendall (TX); 1/24/23 EXCOM – J. DeLoach (NC).

REPORT & RECOMENDATIONS (*include progress on goals*):

Goals for 2023-24:

1. Institute a tracking mechanism for use by the EXCOM on the 5-year 2026 Operational Plan
2. Develop and deliver a draft 10-year Strategic Plan by the 2024 National Congress

1. 5-year Operational Plan Status Report: On August 23, PG John Dodd released an email stating that the Strategic Planning Committee develop and implement a monthly report for the EXCOM to monitor progress on our initiatives on the 5-year Operational Plan and to make informed decisions to move these initiatives forward

where needed. General Officers and Committee Chairmen are tasked in this operational plan to start reporting their progress to the SPC on a two-month basis. Each responsible General Officer and Committee Chairman shall take steps to ensure SAR needs and expectations on these objectives are met. That includes:

1. Establish joint committee working groups for each Strategic Objective.
2. Establish clear and actionable steps on how and what you will do to achieve those objectives, including actions taken, personnel assignments, time, and resources needed.
3. Responsible General Officers report every two months actions to the Strategic Planning Committee (Jay DeLoach at jaydeloach@aol.com and Jim Kuykendall at jimkuy55@gmail.com) with:
 - a. Details on what has been done on each objective.
 - b. Information on progress made or obstacles, as well as what you are doing to overcome them.
 - c. Resource issues: what is the issue, and how this can be overcome or worked around, etc.

For the success of achieving our vision to “Become a Major Recognized Voice of the American Revolution by 2026” and beyond, we will need the leadership of the PG and EXCOM to drive the execution of the 5-year Operational Plan. Additionally, the involvement of present and future PG’s as well as all General Officers is vital to building an actionable roadmap in the next strategic plan that will fuel our membership growth and propel us into a robust organization with national presence/recognition.

On 11/29/23, Strategic Planning delivered the first Status Report to the EXCOM and initial steps were made to understand the value and use of this report with regards to the EXCOM business. On 1/24/24, Strategic Planning delivered an update to the Status Report for EXCOM deliberation. It was observed that parts of 5 of the 7 goals in the 5-year Operational Plan had been addressed earlier in the EXCOM agenda. A healthy discussion ensued on how to utilize the Status Report into the EXCOM business practices and decision-making. On 1/28/24, the PG sent an email to all General Officers and Committee Chairmen, “...at last week’s Executive Committee meeting, much of the discussion centered around our Strategic Plan, both associating all committee activities to the plan and reporting to the responsible party your committee’s progress.... There will be a more in-depth presentation at the Trustees’ meeting. Please consider this in your meetings between now and then and at your Louisville meetings.... It is a ‘different way of thinking’ for us, but one which will reap rewards as we march through this Decade of the Anniversary of the American Revolution.” A copy of the 1/19/24 Status Report is included. The next update to the 5-year Operational Plan Status Report will be March 2024.

2. 2035 Strategic Plan Development: The Committee established a “drumbeat” to build the 2035 Strategic Plan with a completion target of a draft by or during 2024 Spring Leadership. However, this schedule was too ambitious for the important collaborative work needed to build a strategic plan. Therefore, the topics and schedule were readjusted. A new target for delivering a draft 2035 Strategic Plan is the 2024 National Congress for review and comment. That said, we continue monthly meetings and the following main structure of a draft plan have been developed by the committee as follows:

Mission Statement [EXCOM approved 3/2023] - *The Sons of the American Revolution honors our Revolutionary War patriot ancestors by promoting patriotism, serving our communities, and educating and inspiring future generations about the founding principles of our Country.*

Vision Statement [Committee approved 11/8/23] - *We will be the leading promoter of the study of the American Revolution and an advocate for our Nation’s founding principles.*

Core Values [Committee approved 11/20/23]

Core Value	Action Statement
Integrity	Be honest, respectful, and ethical
Patriotism	Demonstrate love, support, and defense of one’s country
Leadership	Inspire others to achieve our mission
Education	Inform the public about our country’s founding history

Strategic Priorities/Goals [Committee approved 12/18/23]

- 1. People** - Build an organization and culture that grows membership and advances the mission.
- 2. Historical Programs** – Commemorate people, events, and documents; preserve records and artifacts; and support the study of the American Revolution.
- 3. Patriotic Programs** – Inspire a sense of pride based on America’s founding principles.
- 4. Educational Programs** – Educate the public with an accurate understanding of our Nation’s founding and history and its importance today.
- 5. External Relations** – Promote our public image as a patriotic, historical, and educational service organization.
- 6. Internal Operations** – Provide the necessary resources and infrastructure to support members and staff in accomplishing our goals.

Below is the monthly schedule for crafting the Objectives associated with the Strategic Goals above.

Month	Strategic Objectives	Leaders
January 18	People	Jim Kuykendall, Derek Brown
February 20	People	Jim Kuykendall, Derek Brown
March 1	Educational Programs	Dave Perkins, Jim Griffith
March 19	Patriotic/Historical Programs	Brooks Lyles, Ed Hoak
April 23	External Relations	Keith Weissinger, Gary Green
June 4	Internal Operations	Bob Cohen, Jim Klingler

Attachments:

1. 5-year SAR Operational Plan (March 3, 2022)
2. 1/19/24 Status Report of the 5-year SAR Operational Plan

SAR 2026 5-YEAR OPERATIONAL PLAN - Status Report for EXCOM as of January 19, 2024

Goal	Objective	Responsible Agent	Funding	On Track	Overall
1	250th ANNIVERSARY	EXCOM (SG)			
A	Open the SAR museum by 2026	SAR Ed Ctr & Musuem Com	P	YES	
B	Implement public affairs campaign on 250th anniversary by 2024	Communications Com	P	YES	
C	Boost the public image of Society as lineage organization through technology investment and focused marketing campaign of genealogical resources by 2024.	GRS, IT, Communications Committees	N	NO	
2	PATRIOTIC PROGRAM	REGISTRAR GENERAL			
2A	Increase SAR profile	Color Guard Committee	NR	YES	
2B	Increase recognition of local governments, civil servants, and volunteers	Public Service & Heroism Com	NR	YES	
2C	Increase recognition of veterans and veteran organizations	Veterans Committee	NR	YES	
3	HISTORICAL PROGRAMS	HISTORIAN GENERAL			
3A	Partner with other heritage/preservation groups to post 250th anniversary markers in your town by 2033	History Committee	N	YES	
3B	Hold two 250th Rev War commemorations annually thru 2033	America 250 Committee	NR	YES	
3C	Partner with DAR, CAR, and other groups to execute joint 250th celebrations by July 4, 2026	America 250 Committee	unknown	unknown	
4	EDUCATIONS PROGRAMS	HISTORIAN GENERAL			
4A	Develop info campaign on SAR Educational website and SAR Genealogy Research Library's online capabilities	Education Com, Library & Archives Committee	P	YES	
4B	Appoint State Society Education Directors	Education Committee	NR	YES	
4C	Incorporate 250th themes into Youth Contest	Council of Youth Programs	NR	YES	
5	PEOPLE	REGISTRAR GENERAL			
5A	Attract, train, involve, retain members to grow membership by July 4, 2026	Membership Committee Council of State Presidents	NR	NO	
5B	Build / retain a professional staff	Executive Director	F	YES	
6	SUPPORTING SYSTEMS	SECRETARY GENERAL			
6A	Streamline membership and dues collection process by 2023	Nat'l Dues Billing System TF	F	NO	
6B	Enhance communications and eliminate redundant reports by 2023	Secretary General	F	NO	
7	FUNDING	TREASURER GENERAL			
7A	Secure funding for top priority projects by 2025 / museum by 2023	SAR Foundation	P	YES	
7B	Initiate comprehensive capital campaign	SAR Foundation	N	NO	

OVERALL FUNDING: FULL (F), PARTIAL (P), NONE (N), NOT REQUIRED (NR)



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SAR 2026 5-Year Operational Plan for the 250th Anniversary

SAR 2026 Vision

Become a Major Recognized Voice of the American Revolution by 2026

SAR 2026 Mission

To Become a Major Recognized Voice of the American Revolution by Educating America about our Patriotic and Historic past

Goal #1 – 250th Anniversary [EXCOM/SG]

Enhance America's awareness/understanding of the American Revolution by the 250th Anniversary

Objective 1A [SAR Education Center & Museum Committee]: Complete and open to the public the SAR Museum by 2026.

- 1) Complete Phase 2-Step 3 (ii), Solid Light total design of project, including approved preliminary cost estimates by end of 2022.
- 2) Complete funding for the SAR Museum by December 2023.
- 3) Complete bids for construction, permitting, and selection by June 2024.
- 4) Complete construction to support soft opening (i.e., temp. certificate of occupancy) by January 2026.
- 5) Conduct Grand Opening by July 2026.

Objective 1B [Communications Committee]: Create a nationwide, multi-media public affairs campaign, including staffing recommendations for a professional public affairs group, for the 250th Anniversary of the American Revolution by 2022 with implementation by headquarters, state societies, and chapters by 2024.

- 1) Communications Committee and America 250 SAR Committee develop a multi-media public affairs campaign plan in 2022.
- 2) Communications Committee craft the professional qualifications, skills, and staffing plan/recommendations in 2022 for a two-phase hiring plan of a professional public affairs spokesman to run daily social media messaging, press releases, position papers, and related communiques focused on achieving the 5-year Operational Plan Vision.



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- 3) America 250 SAR Committee and Communications Committee develop chapter toolkits and associated training by March 2023.
- 4) State societies implement public affairs plan and train chapters by December 2023.
- 5) Hire/acquire the professional staff first; and then consider a public affairs firm as recommended in Objective 1B.2 by the end of 2023 or earlier.
- 6) Chapters implement public affairs plan by 2024 using chapter toolkits.

Objective 1C [GRS/IT/Communications Committees]: Boost the public image of the Society as a lineage organization through technology investment and a focused marketing campaign of the Society's genealogical resources.

- 1) Communications Committee develop a marketing campaign plan with proposed staffing needs and partnership targets in 2022.
- 2) Information Technology Committee and the Library and Archives Committee accelerate the integration and building of the Patriot Genealogical Research Enterprise (Patriot Research System + Genealogical Research System + SAR Genealogical Research Library + Electronic Membership Application) for functional usage internally and externally by 2024.
- 3) Establish a business partnership with a genealogy/family history research firm by 2023 that can help enhance and market our genealogical research systems.

Goal #2 – Patriotic Programs [Registrar General]

Raise awareness of the SAR as a Patriotic Organization and Reenergize America's Sense of Patriotism

Objective 2A [Color Guard Committee]: Increase local profile by showing the SAR's Colors.

- 1) Increase state society color guard membership by 10% annually.
- 2) Participate in at least one new public event each year.
- 3) Lead by example in your local communities, by society and chapter visibility and actions.
- 4) SAR color guards will participate in local events and parades
- 5) Present SAR 250th flags to local schools and local organizations at a flag raising ceremonies.
- 6) Present SAR Flag Certificates to local organizations and local citizens in uniform.
- 7) Establish a media and social media presence in each chapter's community.

Objective 2B [Public Service & Heroism Committee]: Increase recognition of local governments, civil servants, and volunteers.

- 1) Seek out opportunities to increase Good Citizenship Medal presentations by 25%.



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- 2) Present Public Service and Heroism Commendations to law enforcement, fire safety, and emergency medical services personnel, and other qualified citizens.
- 3) Present awards and certificates to local teachers, coaches, and administrators.

Objective 2C [Veterans Committee]: Increase recognition of local veterans and veterans organizations with an annual veterans event.

- 1) Partner with local veterans organizations to sponsor an event for veterans.
- 2) Visit VA hospitals and present needed items: toiletries, socks, underwear, clothing, books, calendars, etc.
- 3) Sponsor a joint flag retirement ceremony with a veterans organization, or provide a color guard for a veteran's funeral.

Goal #3 – Historical Programs [Historian General]

Make the American Revolution and ‘Our’ Colonial History Relevant Again

Objective 3A [History Committee]: Partner with other Heritage /Preservation Groups to post 250th Anniversary markers in your town through 2033.

- 1) Join with the DAR, C.A.R., and other groups, to place American 250th Anniversary markers at the courthouse, town square, or city cemetery.
- 2) Join with the DAR, C.A.R., and other groups to place 250th Anniversary markers at a local historic site or a battlefield.

Objective 3B [America 250 Committee]: Hold at least two 250th Revolutionary War commemoration programs or recognitions annually through 2033.

- 1) Conduct a presentation, in uniform or period dress, on a local event, a patriot, or a founding document for a school, civic group, or veterans organization.
- 2) Have a SAR table/booth at local festivals and community events.
- 3) Purchase a SAR 250th Anniversary flag for your color guard.
- 4) Present 250th Anniversary flags to local schools and businesses that fly the US flag.
- 5) Make local public service announcements about Today in History through social media and YouTube.
- 6) Share Key Holes to History with local schools and media.

Objective 3C [America 250 Committee]: Partner with the DAR, C.A.R., and other groups to plan and execute a joint 250th Anniversary celebration on 4th of July 2026.

- 1) Establish local America 250th committees.



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- 2) Contact local government and community organizers to involve chapters and states in 4th of July 2026 events and celebrations.

Goal #4 - Educational Programs [Historian General]

Make the SAR a Major Source for Online Information on the American Revolution

Objective 4A [Education Committee, Library & Archives Committee]: Develop an information campaign to inform local school and related organizations about the SAR's Education website and SAR Genealogy Research Library's online capabilities.

- 1) Education Committee will prepare various information media about the Education website, programs of instruction, curriculum enhancement items, videos and Patriot Chest presentation opportunities the SAR provides by Fall of 2022.
- 2) Inform local educators how to contact, interact, and collaborate with the SAR Education Center and Museum staff starting 2022.
- 3) Enhance online access to the SAR artifact collection.

Objective 4B [Education Committee]: Appoint State Society Education Directors who will champion the SARs Education and Youth Awards Programs with their local schools.

- 1) Work with State Boards of Education to learn of specific state requirements for American and State History and Government Education.
- 2) Determine steps to assist and offer same.
- 3) Inform State Boards of Education of SAR Education Outreach initiatives and opportunities.
- 4) Establish SAR Education partnerships between chapters and local schools (recurring visits/presentations).
- 5) Oversee the State Society Patriot Chest Programs.
- 6) Implement SAR Officer and Compatriot Training Programs to include SAR Youth Protection Training.
- 7) Report on Education Outreach Programs, Youth Education Medals and Teacher Recognition Programs through the annual Americanism report.

Objective 4C [Council of Youth Programs]: Incorporate, where appropriate, 250th Anniversary themes into Youth Contests.

- 1) Provide 250th Anniversary topics and themes for essays and orations.
- 2) Incorporate SAR 250th logo into advertising, awards and certificates.



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Goal #5 – People [Registrar General]
Aggressively Grow and Develop Our Membership
and Professional Staff by 4th of July 2026.

Objective 5A [Membership Committee, Council of State Presidents]: Appeal to their patriotism and core American values and principles, as described in public affairs campaign plan, to attract, train, involve, and retain members that aggressively grow our membership by the 4th of July 2026.

- 1) Membership Committee set targets annually for recruitment and retention at the chapter, state and national levels to be approved by the Executive Committee and Trustees.
- 2) Information Technology Committee, in conjunction with the Registrar General, Genealogist General, and the Genealogy Committee, will create and implement an electronic online membership application by end of 2022.
- 3) Membership Committee will develop recruitment and retention tools and best practices for distribution to state societies.
- 4) Education Committee develop and deliver at a training continuum for new members, committees, chapter officers, state officers, and general officers with an array of training materials (videos, guidebooks, presentations, tests, certifications, etc.) by end of 2022.
- 5) State societies will implement a training regimen to educate/train new members, chapter officers, and state officers by end of 2023.
- 6) State societies start a new chapter annually.
- 7) Registrar General, Membership Committee, and state societies conduct a reinstatement campaign to re-engage inactive members from the last 5-10 years.
- 8) Track junior members and engage them. Leverage C.A.R., BSA, JROTC, etc. relationships.

Objective 5B [Executive Director]: Build and retain a professional staff to meet the Society's future growth and goals.

- 1) During 2022, Executive Director and Human Resources Committee assessed the needed professional skills/qualifications/certifications; staffing needs; professional development programs; and resources necessary to build and retain a top-quality staff to meet future Society growth and goals.
- 2) Budget, resource, and implement the assessment recommendations for Objective 5B.1 in a phased approach to be completed by 2025.



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Goal #6 – Supporting Systems

[Secretary General]

Enhance and Simplify Administrative Systems for Societies and Chapters

Objective 6A [National Dues Billings Task Force]: Streamline membership and dues collection processes by the end of 2023.

- 1) Develop a streamlined single process for membership applications, complete with review workflows, that will seamlessly interface with the Membership Database, with Registrar activities, and with Finance administration, leading to a simplified and rapid approval system.
- 2) Simplify and reduce the duplicative processes of each society for dues administration and collection with a National Dues Billing System and Automatic Dues Renewals.
- 3) Enhance and centralize the Registrar Reconciliation Administration through the creation of a single process at the national level, with society and chapter access.

Objective 6B [Secretary General]: Enhance internal communications and eliminate redundant reports by 2023.

- 1) Enhance internal communications through the development of newsletter templates and other forms of communication to compatriots that can be inserted into society and chapter communications in a professional manner.
- 2) Develop online activity calendars that are interactive and usable by all levels of SAR.
- 3) Eliminate redundant reporting systems and reports. Develop and use a single reporting format (i.e., Americanism report) that summarizes the activities of multiple current reports – at all levels of SAR - and generates recommendations for recognitions and awards.

Goal #7 – Funding [Treasurer General]

Secure Sufficient Financial Resources for our Programs and for our Goals

Objective 7A [SAR Foundation]: Aggressively secure financial resources for top priority projects/programs by the end of 2025.

- 1) Secure funding resources for the SAR Museum by the end of 2023.

Objective 7B [SAR Foundation]: Initiate a comprehensive Capital Campaign



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- 1) Establish an endowment fund that can produce a level of annual support sufficient to supplement our current reliance upon membership support.
- 2) Create the necessary funding streams needed for future capital needs, upgrades, and program maintenance by 2025.
- 3) Increase annual donations and pledges to a level sufficient to support our existing and future programs.

THE NATIONAL SOCIETY, SONS OF THE AMERICAN REVOLUTION
COMMITTEE REPORT

Filing Date: 5 February 2024

COMMITTEE NAME: Veterans Committee Chairman: Scott G. Giltner
 Chairman's Address: 605 Dorsey Way, Louisville, KY 40223 Chairman's Phone No. 502-649-4534
 Meeting Dates & Location: 6 February 2024 (virtual)
 Teleconference Dates: NA
 Committee Communications by Mail or E-Mail, Dates: 27 Sept 2023; 30 Sept 2023;
30 Sept 2023; 1 Oct 2023; 3 Oct 2023; 19 Oct 2023; 1 Nov 2023; 15 Nov 2023; 15 Nov 2023;
1 Dec 2023; 15 Dec 2023; 28 Dec 2023; 1 Jan 2024; 17 Jan 2024; 19 Jan 2024; 22 Jan 2024;
27 Jan 2024; 30 Jan 2024; 1 Feb 2024; 3 Feb 2024

EXPENSES: None

PARTICIPATION (Identify members by first initial, last name and state, e.g., "D. Smith (CA)":

Attendance at Recent Meetings:

Virtual (7 September 2023)

MEMBERS – S. Giltner, Chairman (KY); G. Lucas, Vice Chair (WA); A. Greenly, Ex Officio (GA); A. Akers (NH); P. Callanan (MI); R. Ebert (CA); P. Horton (TN); G. Hoyt (GA); D. Jessel (GA); B. Osborn (VA); C. Roe (DC); D. VanHoof (MI); P. Wesolosky (KY)

GUESTS – (Not a Current Member of the Committee in attendance): NA

Fall Leadership (22 September 2023)

MEMBERS – S. Giltner, Chairman (KY); G. Lucas, Vice Chairman (WA); P. Callanan (MI); P. Horton (TN); D. Jessel (GA); D. McMurray (MO); S. Miller (AZ); P. Niemann (NC); B. Osborn (VA); E. Spray (OH); G. Strunk (NC); S. Sullins (MO); D. Van Hoof (MI); B. Wampler (KS); M. Weyler (VA)

GUESTS – (Not a Current Member of the Committee in attendance): R. Peck (FL); J. Gaskins (FL); K. Morris (VA); G. Ohanesian (SC); J. Winter (KS); J. Faulkinbury (CA); R. Coursey (GA); M. Aycock (NC); B. LeJeune (LA); P. Moller (DE); E. Sutton (PA); D. Collins (KY); R. Wess (FL); P. Kelly (VA); J. Hamill (OK); D. Sympson (KY)

Teleconferences: None

Other Service (specify): None

REPORT & RECOMENDATIONS (*include progress on goals*):

Goals (2023-2024):

The Veterans Committee has the following two (2) goals for the current reporting year:

- Receive USS Stark Memorial reports from 250 of the chapters. To date, reports have been received from 215 of the chapters (37% of total chapters).

- Appoint SAR representatives to ten (10) VAMCs where the SAR previously had no representation. For the current reporting year to date, the Veterans Committee has made appointments to five (5) VAMCS where the SAR had no representation.

Additional Veterans Committee activities are reported in the following sections.

Increase Communication with State Societies:

The Veterans Committee continues to improve communication with and support to the state societies. Following is a list of specific communications with the state societies.

- The committee chairman has submitted an article for the upcoming CoSP newsletter to promote the committee's programs.
- The committee chairman will provide a brief presentation to the upcoming CoSP meeting at Spring Leadership to promote the committee's programs.
- The Veterans Committee recently updated its contact list of Veterans Committee Chairmen within the various state societies.
- Since the Fall Leadership meeting, the Veterans Committee has requested nominations for the General William C. Westmoreland Award and for submissions of the USS Stark Memorial Reports from the state societies.
- Communication with the state societies occurs regularly for the appointment of SAR representatives and deputy representatives in VA medical centers.
- Defense POW/MIA Accounting Agency updates are regularly provided to state societies.

Representation at Veterans Affairs Medical Centers:

Since the Fall Leadership Meeting, the Veterans Committee has made eight (8) appointments of NSSAR members as representatives to seven (7) different VAMCs. Four (4) of these appointments were made to VAMCs where the NSSAR had not previously been represented. The Veterans Committee continues to promote its program to recruit SAR members to be appointed as representatives in geographic areas where the SAR currently has little or no representation.

A current goal of the Veterans Committee is to appoint SAR representatives to ten (10) VAMCs where the SAR had no representation prior to the 2022 National Congress. To date, the Veterans Committee has made appointments to five (5) VAMCS where the SAR previously had no representation.

Defense POW/MIA Accounting Agency:

An article promoting this program has been submitted for the next issue of the *SAR Magazine*.

This program initiated by the Veterans Committee in 2021 continues in its effort to monitor the DPAA information releases on recently identified remains of POW/MIA service members. The Veterans Committee passes along information on the reinterments to the local state society and/or chapter. To what degree the SAR can participate is determined by the family of the deceased service member.

Since the 2023 Fall Leadership meeting, information on twenty-nine (29) reinterments has been provided to SAR chapters/societies in twenty (20) states. Some of these reinterments have yet to occur, but currently the Veterans Committee has received a positive response from 23% of the chapters/societies contacted. Efforts will continue to increase the percentage of responses from the chapters after they have been contacted.

Increase Participation in the USS Stark Memorial Report:

The deadline for the submission of the USS Stark Memorial Award reports occurred on 1 February. Although some reports that were mailed may come in over the next few days, the total so far shows an increase of one (1) in chapter submissions. For the 2022 contest year, there were 214 chapter reports submitted, while for the 2023 contest year, there are currently 215 chapter reports submitted. The number of state societies reporting for 2022 was twenty-one (21) while for 2023 there were twenty (20) state societies reporting. This is a net decrease of one (1) society. By comparison, the individual chapters reporting represents twenty-six (26) different state societies.

The breakdown, by state, of chapters reporting individually is as follows:

Texas Society	– 27	(54.0% of Texas Society chapters)
North Carolina Society	– 23	(82.1% of North Carolina Society chapters)
Virginia Society	– 21	(67.7% of Virginia Society chapters)
Georgia Society	– 18	(51.4% of Georgia Society chapters)
Ohio Society	– 16	(66.7% of Ohio Society chapters)
Tennessee Society	– 13	(59.1% of Tennessee Society chapters)
Kentucky Society	– 13	(59.1% of Kentucky Society chapters)
Florida Society	– 13	(39.4% of Florida Society chapters)
Kansas Society	– 10	(76.9% of Kansas Society chapters)
Michigan Society	– 10	(76.9% of Michigan Society chapters)
Maryland Society	– 9	(56.3% of Maryland Society chapters)
Louisiana Society	– 7	(63.6% of Louisiana Society chapters)
Oklahoma Society	– 5	(100% of Oklahoma Society chapters)
Colorado Society	– 4	(80.0% of Colorado Society chapters)
Alabama Society	– 4	(30.8% of Alabama Society chapters)
Pennsylvania Society	– 4	(16.0% of Pennsylvania Society chapters)
Wisconsin Society	– 3	(60.0% of Wisconsin Society chapters)
Arizona Society	– 3	(37.5% of Arizona Society chapters)
West Virginia Society	– 3	(25.0% of West Virginia Society chapters)
Indiana Society	– 3	(21.4% of Indiana Society chapters)
Iowa Society	– 1	(100% of Iowa Society chapters)
Wyoming Society	– 1	(100% of Wyoming Society chapters)
New Mexico	– 1	(25.0% of New Mexico Society chapters)
Missouri Society	– 1	(7.1% of Missouri Society chapters)
Illinois Society	– 1	(6.7% of Illinois Society chapters)
California Society	– 1	(3.4% of California Society chapters)
Rhode Island Society	–	No Society Chapters
Dist. of Columbia Society	–	No Society Chapters

The chapters and societies receiving the USS Stark Memorial Award for 2023 will be approved at the Veterans Committee meeting to be held at Spring Leadership on 1 March 2024.

Additional information regarding the reports submitted for the 2023 contest year include:

- The number of chapters submitting a USS Stark Memorial report for the first time was thirty-two (32).
- A goal of the Veterans Committee was to receive USS Stark Memorial reports from 250 chapters for 2023; reports have been received from 215 of the chapters.
- The number of Service to Veterans points reported in 2022 was 1,438,917. The Service to Veterans points reported in 2023 was 1,716,337. This represents an increase of 19% in service to Veterans activities by SAR members.

State Veterans Service Award:

To qualify for this award, a state society must submit a USS Stark Memorial Report with a minimum of 50 points, plus 50% of the society's chapters must submit a report with a minimum of 50 points each. The state societies receiving this award are:

Oklahoma Society	– 100% of chapters submitting a qualifying report
Iowa Society	– 100% of chapters submitting a qualifying report
Wyoming Society	– 100% of chapters submitting a qualifying report
North Carolina Society	– 82.1% of chapters submitting a qualifying report
Colorado Society	– 80.0% of chapters submitting a qualifying report
Kansas Society	– 76.9% of chapters submitting a qualifying report
Michigan Society	– 76.9% of chapters submitting a qualifying report

Virginia Society	– 67.7% of chapters submitting a qualifying report
Ohio Society	– 66.7% of chapters submitting a qualifying report
Louisiana Society	– 63.6% of chapters submitting a qualifying report
Kentucky Society	– 59.1% of chapters submitting a qualifying report
Tennessee Society	– 59.1% of chapters submitting a qualifying report
Maryland Society	– 56.3% of chapters submitting a qualifying report
Texas Society	– 54.0% of chapters submitting a qualifying report
Georgia Society	– 51.4% of chapters submitting a qualifying report
Rhode Island Society	No society chapters
Dist. of Columbia Society	No society chapters

Increase Participation in the General William C. Westmoreland Award:

Eight (8) nominees for the 2023 General William C. Westmoreland Award were received. This is a decrease of three (3) nominations compared to 2022. The recipient of this award for the 2023 contest year will be determined in the Veterans Committee virtual meeting on 6 February and will be announced at the Spring Leadership Meeting. This award will be presented at the 2024 National Congress to be held in Lancaster, PA. Efforts will continue to promote this award within the SAR membership.