



OFFICIAL HANDBOOK

North Carolina Society

of the

Sons of the American Revolution

Volume 2

Chapter Leadership

2016

NC SAR Handbook Vol 2, Chapter Leadership

20 June 2016

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The History of the National Society Sons of the American Revolution

The basic Tenets of the National Society of the Sons of the American Revolution are to perpetuate the people and events of the American Revolution, to maintain the institutions of American Freedom, and to promote fellowship among the descendants of Revolutionary War Patriots.

The growth of the SAR has been steady and for the past one hundred years the public spirited members have given generously of time, labor and means in promoting the objectives. The SAR is a story of work. One must be impressed by its splendid record of service.

The SAR is not only a genealogical institution but a Society of gentlemen who have dedicated their efforts to keep the standards of American Citizenship at a high level, to reinforce American Institutions, and to inculcate loyalty to American ideals.

The SAR membership rolls of the over 190,000 Compatriots in 2015 echoes the names of fifteen Presidents of the United States; Giants in all fields of endeavor-government, military, finance, industry commerce, education; prominent men and inconspicuous men; station in life is never a factor for membership.

The SAR is a Society thoroughly American, thoroughly democratic, non-partisan, non-sectarian. The membership qualifications are good character and lineal descent from a Patriot of the American Revolution.

The SAR is justly proud of its achievements since 1889. It has erected or promoted the erection of hundreds of monuments and tablets commemorating the people and events of the American Revolution. It has marked the graves of thousands of those who fought for American Independence. It has continually observed and conducted programs on the Patriotic Holidays: George Washington's Birthday, Patriot's Day, Flag Day, Fourth of July, Constitution Day, and the Surrender of Yorktown.

The National Society SAR was organized on April 30, 1889. An initial action of the Connecticut Society in 1890 was to promote the National observance of "Flag Day." In the early years the Society promoted the daily display of "The Stars and Stripes" on all public buildings, in courtrooms, and at every post office in the country.

The SAR was a main force in securing the enactment of laws prohibiting the desecration of the American Flag in most states. The SAR promoted legislation through the National Congress to secure appropriations for the beautiful John Paul Jones crypt at the United States Naval Academy in Annapolis and the Thomas Jefferson Memorial at the Tidal Basin in the Nation's Capitol.

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Millions of immigrants entered this country in the early years of this Twentieth Century. The SAR assisted these aliens in preparing for American citizenship by writing a pamphlet on the United States and its institutions. This pamphlet later was translated into fifteen languages and adopted by the United States Government. Millions of copies were distributed to the new aliens.

Members of the Louisiana Society SAR searched and obtained the records of the Galvez Army from the Spanish Archives in Madrid. This made it possible for descendants of the men of this Revolutionary force to become members of the SAR, DAR, and Sons of the Revolution (SR).

The Society takes pride in the ancestry of its members. Of the 56 Signers of the Declaration of Independence, 44 are represented by descendants in the SAR. The SAR rescued the graves of several Signers and marked them with appropriate memorials. The SAR's interest in collecting and publishing records of the Revolutionary War began with the First SAR Congress in Louisville, Kentucky, in 1890. A Resolution of this Congress asked for national legislation to have the records assembled, catalogued and made accessible to the public. The lobbying efforts of the SAR are responsible for the building of the National Archives in Washington. The SAR promoted Congressional action for the Pension Bureau to index the personnel records of the 62,000 Revolutionary War pensioners. The SAR took the initiative for the publication of the 57,000 soldiers and sailors of France who participated in the American Revolution and compiled a listing of the 2,112 French compatriots who died fighting in the American Revolution.

The History of the North Carolina Society SAR

The North Carolina Society of the Sons of the American Revolution (North Carolina SAR) conducted its organizational meeting in Washington, North Carolina on February 22, 1911. Stephen C. Bragaw was the first President and served until 1913. The Society was discontinued in 1920; however, in 1922, the National Society appointed a "Special Organizer", Maj. John F. Jones, of Blacksburg, South Carolina to oversee both the Society of North Carolina and South Carolina. Subsequently, Mr. Harrison Otis re-organized the North Carolina Society at the Sir Walter Hotel in Raleigh on April 27, 1928 with 333 members. In more recent years, membership has grown to over 1,000 members. The North Carolina Charter from the National Society is dated May 1928.

The North Carolina Society hosted the National SAR Congress in Charlotte May 17-21, 1931. In honor of the Society's 100th anniversary year of organization, the North Carolina SAR hosted the National Congress in Winston-Salem a second time July 9-13, 2011.

The newsletter for the society, *The Old North State*, is published three times annually and is provided to each North Carolina SAR compatriot at no cost. It was first published in November 1993, by Thomas N. Clark of Burlington who served as Editor through May 1996. Beginning with Volume IV in September 1996, John O. Thornhill of

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Rose Hill took over as Editor. At the 107th National Congress held in Baltimore in July of 1997, *The Old North State* won Honorable Mention in the “Jennings H. Flathers Award” for newsletters of Societies under 500 members. Mr. G. Steven Pittard of Fayetteville became Editor with Volume XIII, Number 1, in the fall of 2005. At the 117th National Congress held in Williamsburg in July 2007, *The Old North State* won the “Grahame T. Smallwood, Jr. Award” for best news publication of more than 10 pages for a State Society with 500 or more members.

The North Carolina Society is a member organization of the National Society Sons of the American Revolution (National Society SAR) and has the right to nominate a voting Trustee and Alternate Trustee for the National Society each year. The North Carolina Society is part of the South Atlantic District, National Society SAR, consisting of the states of North Carolina, South Carolina, Georgia, and Florida. By custom, North Carolina nominates a Vice President General to represent the South Atlantic District once every four (4) years. The North Carolina Society holds its own Board of Managers Meeting twice annually (e.g., February and August). The Annual Meeting of the North Carolina SAR is held each year in April. State officers are elected every year at the Annual Meeting for a one year term of office. The North Carolina Society is composed twenty-six (26) Chapters divided into five (5) Districts, each governed by a District Vice President.

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Forming a Chapter

The local chapter is the most important link between the individual compatriot and the state and national societies. It is through the local chapter that the work of the National Society is performed at the community level. Membership growth should be emphasized continually. New chapters should be organized whenever possible. The information presented here is designed as a guide for those compatriots who undertake the formation of a local chapter.

Obtain a list of those compatriots residing in a designated area and call them together for a pre-organization meeting. Invite local members of DAR who indicate an interest in being of assistance, especially in recruiting new SAR members.

When a sufficient number of members desire to form a chapter, as specified by the state society bylaws, they may apply for a charter to the secretary of the state society. (A sample application form for new chapters follows this page.) The North Carolina Society SAR requires a minimum of 10 primary members of the North Carolina Society SAR. Dual members may not be counted in this minimum number. Following application to the state society, a Personalized Charter may be obtained from National SAR Merchandise and issued by that body. If desired, the charter may be kept open for a reasonable period of time to permit prospective members to file their applications and sign as "charter members."

An organization meeting should be held after notification of the issuance of a state society charter, at which time the new chapter officers are duly installed by the President of the state society, and the charter is formally presented. The ceremonies should be accompanied by a dinner if possible, to which members and guests are invited. The institution of a new chapter is an important event. It is essential that ceremonies be conducted with dignity and impressiveness.

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Change in officers

National SAR

Go to NSSAR Forms and look for the phrase at the top of the list of forms for:

If you are looking to report a change in State of Chapter level officers, you can use the Officer change report Form.

Please use this form to report the change in officers to National Headquarters.

Use this form when you are reporting a change in State Society of Chapter Officers.

Enter the name of the Chapter or State Society that you are reporting on, and then enter the name and National Number of each of the NEW officers.

Note: You may print a copy of the completed form for your records by going to [File] [Print] on your computer BEFORE you submit the form.

By hitting Submit the form will be automatically emailed to Debbie Smalley at National Headquarters.

The Form works best if you are logged in to the system. You can use it if you are not logged in, but it works best if you are logged in.

When the chapter officers' listing is updated, the President and Secretary will have access the national **Member Database** for the chapter.

North Carolina SAR

Also, you should complete a similar form for the North Carolina SAR leadership. On the Forms page look for:

[Update Your Chapter's Officer Listing Here](#)

This should be completed annually to update your chapter president, treasurer, registrar, color guard commander and secretary. This will alert the state secretary and he will pass the information to the respective state officers.

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Chapter Meetings

Experience has proven that the most successful chapters are those which meet on a regular schedule. Monthly meetings are recommended, at a convenient location with adequate parking space. Many chapters do not meet during July and August because of member vacations. Attendance at meetings is reflective of the type of programs offered. It is often not necessary to transact all of the business of the chapter at the regular meetings. An executive committee consisting of the chapter officers and two or three compatriots from the general membership can manage normal affairs ably.

Reports by the President, Secretary, Treasurer and Registrar should be furnished at reasonable intervals. Action affecting chapter policy and projects should be submitted to the membership for a majority decision. The chapter president should appoint a membership committee to stimulate chapter growth, with duties to contact and assist eligible prospective members to join.

Programs should be arranged by a program committee to insure interesting and constructive meetings, thus resulting in a greater attendance. Publicity for the chapter is of vital importance, and it should be sought for every SAR meeting and event. Special attention should be accorded the manner in which chapter meetings are conducted. Regardless of the purpose for which it is called, every meeting should be characterized by adherence to a uniform and proper procedure.

A United States Flag should be displayed to the right of the presiding officer or principal lectern. The SAR flag and the state flag are placed at the left in the same relative position. The following agenda has been used by many chapters:

1. Call to order by the presiding officer with one rap of the gavel. A gavel should always be used.
2. Invocation by the Chaplain or by a compatriot designated by the presiding officer.
3. Color Guard, advance the colors
4. Pledge of Allegiance to the Flag of the United States of America.

NOTE: In the case of foreign societies and chapters, it is appropriate that the members make their pledge to their own national flags in accordance with the custom of the country involved. Likewise, societies in foreign lands may choose not to use the pledge to the SAR.

5. Pledge to the SAR: "**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.**"

6. Color Guard, post the colors.
7. Ask for amendments to the distributed minutes of the previous meeting. If there are no (further) corrections, the minutes stand approved as distributed (corrected).

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8. Officers' reports: Accept as published unless there have been requests for oral reports.
9. Committee reports: Accept as published unless there have been requests for oral reports.
10. Introduction of new members and guests.
11. Unfinished business.
12. New business and correspondence.
13. Introduction of the speaker or program.
14. Presiding officer's remarks and thanks to speaker or program principal.
15. Announcements
16. (Optional, and frequently used) Before adjourning, the presiding officer may ask the members to rise and repeat in unison: "**Until we meet again, let us remember our obligations to our forefathers who gave us our Constitution, the Bill of Rights, an independent Supreme Court and a nation of free men.**"
17. Benediction by the Chaplain or a designee.
18. Adjournment declared by presiding officer and complemented by two raps of the gavel.

Minutes

The minutes of a meeting should contain:

1. Kind of meeting (regular or special).
2. Name of chapter or state society.
3. Date and place of meeting.
4. Presence of President and Secretary; if absent, their substitutes.
5. Minutes of previous meeting were approved, approved as corrected, or dispensed with the reading.
6. Hours of meeting and adjournment.
7. Number present (to comply with requirement of a quorum).
8. All main motions (except those withdrawn), points of order and appeal, and all other motions not lost or withdrawn.

Minutes should be a record of what is done and not contain discussion or a record of what is said. The name of the person who makes the motion and who seconds it are recorded. The action taken on a motion is recorded.

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Conducting Meetings

Robert's Rules of Order

For Fair and Orderly Meetings & Conventions

Provides common rules and procedures for deliberation and debate in order to place the whole membership on the same footing and speaking the same language. The conduct of ALL business is controlled by the general will of the whole membership - the right of the deliberate majority to decide. Complementary is the right of at least a strong minority to require the majority to be deliberate - to act according to its considered judgment AFTER a full and fair "working through" of the issues involved. Robert's Rules provides for constructive and democratic meetings, to help, not hinder, the business of the assembly. Under no circumstances should "undue strictness" be allowed to intimidate members or limit full participation.

The fundamental right of deliberative assemblies require all questions to be thoroughly discussed before taking action!

The assembly rules - they have the final say on everything!
Silence means consent!

- Obtain the floor (the right to speak) by being the first to stand when the person speaking has finished; state Mr. President. Raising your hand means nothing, and standing while another has the floor is out of order! Must be recognized by the Chair before speaking!
- Debate cannot begin until the Chair has stated the motion or resolution and asked "are you ready for the question?" If no one rises, the chair calls for the vote!
- Before the motion is stated by the Chair (the question) members may suggest modification of the motion; the mover can modify as he pleases, or even withdraw the motion without consent of the seconder; if mover modifies, the seconder can withdraw the second.
- The "immediately pending question" is the last question stated by the Chair!
Motion/Resolution - Amendment - Motion to Postpone
- The member moving the "immediately pending question" is entitled to preference to the floor!
- No member can speak twice to the same issue until everyone else wishing to speak has spoken to it once!
- All remarks must be directed to the Chair. Remarks must be courteous in language and deportment - avoid all personalities, never allude to others by name or to motives!
- The agenda and all committee reports are merely recommendations! When presented to the assembly and the question is stated, debate begins and changes occur!

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Parliamentary Procedure

What Is Parliamentary Procedure?

- It is a set of rules for conduct at meetings that allows everyone to be heard and to make decisions without confusion.

Why is Parliamentary Procedure Important?

- Because it's a time tested method of conducting business at meetings and public gatherings. It can be adapted to fit the needs of any organization. Today, Robert's Rules of Order newly revised is the basic handbook of operation for most clubs, organizations and other groups. So it's important that everyone know these basic rules!

Organizations using parliamentary procedure usually follow a fixed order of business. Below is a typical example:

- Call to order.
- Roll call of members present.
- Reading of minutes of last meeting.
- Officers' reports.
- Committee reports.
- Special orders --- Important business previously designated for consideration at this meeting.
- Unfinished business.
- New business.
- Announcements.
- Adjournment.

The method used by members to express themselves is in the form of moving motions. A motion is a proposal that the entire membership take action or a stand on an issue.

Individual members can:

- Call to order.
- Second motions.
- Debate motions.
- Vote on motions.

There are four Basic Types of Motions:

- **Main Motions:** The purpose of a main motion is to introduce items to the membership for their consideration. They cannot be made when any other motion is on the floor, and yield to privileged, subsidiary, and incidental motions.
- **Secondary Motions:** **Secondary motions** offer different approaches to consider in the discussion of the main motion. A secondary motion says: Let's do that this way. Secondary motions fall into one of the three classes:
 - **Subsidiary Motions:** Their purpose is to change or affect how a main motion is handled, and is voted on before a main motion.

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- Privileged Motions: Their purpose is to bring up items that are urgent about special or important matters unrelated to pending business.
- Incidental Motions: Their purpose is to provide a means of questioning procedure concerning other motions and must be considered before the other motion.

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How Motions are to be presented

1. Obtaining the floor
 - Wait until the last speaker has finished.
 - Rise and address the Chairman by saying, "Mr. President."
 - Wait until the Chairman recognizes you.
2. Make Your Motion
 - Speak in a clear and concise manner.
 - Always state a motion affirmatively. Say, "I move that we ..." rather than, "I move that we do not ..."
 - Avoid personalities and stay on your subject.
3. Wait for Someone to Second Your Motion
4. Another member will second your motion or the Chairman will call for a second.
5. If there is no second to your motion it is lost.
6. The Chairman States Your Motion
 - The Chairman will say, "It has been moved and seconded that we ..." Thus placing your motion before the membership for consideration and action.
 - The membership then either debates your motion, or may move directly to a vote.
 - Once your motion is presented to the membership by the chairman it becomes "assembly property", and cannot be changed by you without the consent of the members.
7. Expanding on Your Motion
 - The time for you to speak in favor of your motion is at this point in time, rather than at the time you present it.
 - The mover is always allowed to speak first.
 - All comments and debate must be directed to the chairman.
 - Keep to the time limit for speaking that has been established.
 - The mover may speak again only after other speakers are finished, unless called upon by the Chairman.
8. Putting the Question to the Membership
 - The Chairman asks, "Are you ready to vote on the question?"
 - If there is no more discussion, a vote is taken.
 - On a motion to move the previous question may be adapted.

Voting on a Motion:

The method of vote on any motion depends on the situation and the by-laws of policy of your organization. There are five methods used to vote by most organizations, they are:

- By Voice -- The Chairman asks those in favor to say, "Aye", those opposed to say "no". Any member may move for an exact count.
- By Roll Call -- Each member answers "yes" or "no" as his name is called. This method is used when a record of each person's vote is required.

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- By General Consent -- When a motion is not likely to be opposed, the Chairman says, "if there is no objection ..." The membership shows agreement by their silence, however if one member says, "I object," the item must be put to a vote.
- By Division -- This is a slight verification of a voice vote. It does not require a count unless the chairman so desires. Members raise their hands or stand.
- By Ballot -- Members write their vote on a slip of paper, this method is used when secrecy is desired.
- There are two other motions that are commonly used that relate to voting.
- Motion to Table -- This motion is often used in the attempt to "kill" a motion. The option is always present, however, to "take from the table", for reconsideration by the membership.
- Motion to Postpone Indefinitely -- This is often used as a means of parliamentary strategy and allows opponents of motion to test their strength without an actual vote being taken. Also, debate is once again open on the main motion.

Parliamentary Procedure is the best way to get things done at your meetings. But, it will only work if you use it properly.

- Allow motions that are in order.
- Have members obtain the floor properly.
- Speak clearly and concisely.
- Obey the rules of debate.
- Most importantly, *BE COURTEOUS*.

Hints for Inexperienced Chairmen

While in the chair, have beside you your Constitution, By-laws, and Rules of Order, which should be studied until you are perfectly familiar with them. You cannot tell the moment you may need this knowledge. If a member asks what motion to make in order to attain a certain object, you should be able to tell him at once. You should memorize the list of ordinary motions arranged in their order of precedence, and should be able to refer to the Table of Rules so quickly that there will be no delay in deciding all points contained in it. Become familiar with the first ten sections of these Rules; they are simple, and will enable you more quickly to master parliamentary law.

You should know all the business to come regularly before the meeting, and call for it in its regular order. Have with you a list of members of all committees, to guide you in nominating new committees.

When a motion is made, do not recognize any member or allow anyone to speak until the motion is seconded and you have stated the question; or, in case of there being no second and no response to your call for a second, until you have announced that fact; except in case of a main motion before it is seconded or stated someone rises and says he rises to move a reconsideration, or to call up the motion to reconsider, or to move to take a question from the table. In any of these cases you should recognize the interrupting member as entitled to the floor. If you have made a mistake and assigned the floor to the

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wrong person, or recognized a motion that was not in order, correct the error as soon as your attention is called to it. So, when a vote is taken, announce the result and also what question, if any, is then pending, before recognizing any member that addresses the chair. Never wait for mere routine motions to be seconded, when you know no one objects to them.

If a member ignorantly makes an improper motion, do not rule it out of order, but courteously suggest the proper one. If it is moved "to lay the question on the table until 3 P.M.," as the motion is improper, ask if the intention is "to postpone the question to 3 P.M.;" if the answer is yes, then state that the question is on the postponement to that time. If it is moved simply "to postpone the question," without stating the time, do not rule it out of order, but ask the mover if he wishes "to postpone the question indefinitely" (which kills it), or "to lay it on the table" (which enables it to be taken up at any other time); then state the question in accordance with the motion he intended to make. So, if after a report has been presented and read, a member moves that "it be received," ask him if he means to move "its adoption" (or "acceptance," which is the same thing), as the report has been already received. No vote should be taken on receiving a report, which merely brings it before the assembly, and allows it to be read, unless someone objects to its reception.

The chairman of a committee usually has the most to say in reference to questions before the committee; but the chairman of an ordinary deliberative assembly, especially a large one, should, of all the members, have the least to say upon the merits of pending questions.

Never interrupt members while speaking, simply because you know more about the matter than they do; never get excited; never be unjust to the most troublesome member, or take advantage of his ignorance of parliamentary law, even though a temporary good is accomplished thereby.

Know all about parliamentary law, but do not try to show off your knowledge. Never be technical, or stricter than is absolutely necessary for the good of the meeting. Use your judgment; the assembly may be of such a nature through its ignorance of parliamentary usages and peaceable disposition, that a strict enforcement of the rules, instead of assisting, would greatly hinder business; but in large assemblies, where there is much work to be done, and especially where there is liability to trouble, the only safe course is to require a strict observance of the rules

The Rules

- **Point of Privilege:** Pertains to noise, personal comfort, etc. - may interrupt only if necessary!
- **Parliamentary Inquiry:** Inquire as to the correct motion - to accomplish a desired result, or raise a point of order
- **Point of Information:** Generally applies to information desired from the speaker: "I should like to ask the (speaker) a question." • **Orders of the Day (Agenda):** A call to adhere to the agenda (a deviation from the agenda requires suspending the

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- Rules) **Point of Order:** Infraction of the rules, or improper decorum in speaking. Must be raised immediately after the error is made
- **Main Motion:** Brings new business (the next item on the agenda) before the assembly
 - **Divide the Question:** Divides a motion into two or more separate motions (must be able to stand on their own)
 - **Consider by Paragraph:** Adoption of paper is held until all paragraphs are debated and amended and entire paper is satisfactory; after all paragraphs are considered, the entire paper is then open to amendment, and paragraphs may be further amended. Any Preamble cannot be considered until debate on the body of the paper has ceased.
 - **Amend:** Inserting or striking out words or paragraphs, or substituting whole paragraphs or resolutions
 - **Withdraw/Modify Motion:** Applies only after question is stated; mover can accept an amendment without obtaining the floor • **Commit /Refer/Recommit to Committee:** State the committee to receive the question or resolution; if no committee exists include size of committee desired and method of selecting the members (election or appointment). **Extend Debate:** Applies only to the immediately pending question; extends until a certain time or for a certain period of time
 - **Limit Debate:** Closing debate at a certain time, or limiting to a certain period of time
 - **Postpone to a Certain Time:** State the time the motion or agenda item will be resumed
 - **Object to Consideration:** Objection must be stated before discussion or another motion is stated
 - **Lay on the Table:** Temporarily suspends further consideration/action on pending question; may be made after motion to close debate has carried or is pending
 - **Take from the Table:** Resumes consideration of item previously "laid on the table" - state the motion to take from the table
 - **Reconsider:** Can be made only by one on the prevailing side who has changed position or view
 - **Postpone Indefinitely:** Kills the question/resolution for this session - exception: the motion to reconsider can be made this session
 - **Previous Question:** Closes debate if successful - may be moved to "Close Debate" if preferred
 - **Informal Consideration:** Move that the assembly go into "Committee of the Whole" - informal debate as if in committee; this committee may limit number or length of speeches or close debate by other means by a 2/3 vote. All votes, however, are formal.
 - **Appeal Decision of the Chair:** Appeal for the assembly to decide - must be made before other business is resumed; NOT debatable if relates to decorum, violation of rules or order of business
 - **Suspend the Rules:** Allows a violation of the assembly's own rules (except Constitution); the object of the suspension must be specified

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Chapter Activities (See National SAR Vol II)

An active chapter should have interesting and productive activities. Some recommended projects are:

1. Support the SAR Youth Programs:

- Arrange with local school authorities for the annual awarding of bronze Good Citizenship Medals to a limited number of qualifying students. Rules governing the program should be approved by both the school authorities and the chapter.
- Participate in the National Society SAR Eagle Scout Scholarship and Awards Program. Prepare and distribute certificates of recognition to local Scout Troops and to the current class of Eagle Scouts who passed the Board of Review between July 1 and the next June 30 of each year. Provide applications to each Eagle Scout, as defined above.
- Arrange with local high school authorities for the participation by students who are in their junior or senior grades in the George S. and Stella M. Knight Essay Contest.
- Arrange with local high school and/or college ROTC officials for the awarding of ROTC Medals. This SAR program has the full support and approval of the Department of Defense. Further details are available from National Headquarters. Support the Enhanced JROTC cadet program, a scholarship program for junior-year cadets.
- Arrange with local high schools for their participation in the Joseph S. Rumbaugh Historical Patriotic Oration Contest. The National Association of Secondary School Principals has placed this contest on the Approved List of National Contests and Activities. Contact the state society for details. Copies of contest rules are available without cost from National Headquarters.
- Consider the possibility of sponsoring a local Society of the Children of the American Revolution (C.A.R.). An organized C.A.R. Society always needs SAR support.
- Support the Americanism Elementary School Poster contest
- Support The Sgt. Moses Adams Memorial Middle School Brochure Contest
- Sponsor an American History Teacher award and support the Thomas & Betty Lawrence American History Teacher of the Year award.

2. Provide framed facsimiles of the basic documents (Bill of Rights and the Declaration of Independence) for local government buildings, bus, train and airport waiting rooms, schools, libraries, courtrooms, fraternal lodges, police and fire stations and banks. The words, "Presented by Chapter of the Sons of the American Revolution" should be written in small text at the bottom before framing. It should be positioned so that it will not

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conflict with the body of these documents. These facsimile documents are available on order from National Headquarters and will fit in standard 18" x 24" frames.

3. Support the program for placing and dedicating SAR bronze markers at the graves of compatriots and/or Revolutionary veterans.

4. Furnish capable and interesting speakers to schools, organizations, public meetings, graduations, forums, and to radio and television stations, especially on patriotic holidays and anniversaries.

5. Participate in new citizenship swearing-in ceremonies. SAR representatives should congratulate the new citizens and, if permitted by the presiding judge, publicly address them. Some chapters present the new citizens with miniature U. S. flags or other patriotic mementos.

6. Sponsor or participate in celebrations of historic events and national holidays, especially Washington's Birthday, American History Month, Patriots Day, Veterans Day, Flag Day, Independence Day and Constitution Week. A luncheon or dinner is particularly recommended, together with an interesting speaker and/or appropriate entertainment. Chapters frequently cooperate with local DAR chapters in joint meetings on some of these special occasions. Participate in the National Society Historic Celebrations Award Program.

7. Take part in the volunteer services programs at local veteran hospitals, clinics and/or retirement Homes.

8. Honor law enforcement officers with the SAR Law Enforcement Commendation Medal when justified by their bravery, length of service or contribution to the community.

9 Award the SAR Medal of Appreciation to a member of the DAR who has furnished outstanding assistance to a particular SAR chapter, especially in obtaining new members. The presentation, with adequate ceremonies, may be effected at an SAR or DAR event.

10. Take particular interest in the local schools, especially the textbooks issued or recommended, instructional personnel and program employed.

11. Encourage the awarding of the SAR War Service Medals. Many compatriots have served in the armed forces during World War I and II, Korea, Vietnam and Southwest Asia. These members may purchase the SAR War Service Medal from National Headquarters. New members should be encouraged to complete the Veteran Recognition Survey Forms located on the vetcorps.info website. It is recommended that the chapter formally present the medal at a meeting or fitting ceremony.

12. Promote "Honor the Flag" activities in support of the Admiral William B. Furlong Memorial Award Program. The Flag Certificate, authorized in 1987, is presented to

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individuals, companies and government agencies that fly the United States flag for patriotic purposes only. It is not to be given to any commercial enterprise that obviously flies it for advertising purposes.

13. Report activities of the chapter using the Americanism Report, National Society USS Stark Memorial Award and the General William C. Westmoreland Award reports and the Annual Reconciliation Report.

Steps to Become a Member of the SAR

The process of becoming a member of the Sons of the American Revolution requires a number of steps:

Determine eligibility: Check that you satisfy the Qualifications for membership and that your ancestor provided Acceptable Service Note: The SAR does not restrict membership based on race, color, religion, national origin, or nation of citizenship or residency. Marriage (and its documentation) for the several generations going back to the Patriot Ancestor is desired, but is not a requirement. Legitimacy in any generation is not a requirement. Descendants of plural marriages are not excluded from SAR membership. Bloodline descent -- legitimate or illegitimate -- from a Patriot Ancestor is what is required and is what must be documented. You must also have two members recommend you for membership.

Find a Helper: Contact the New Member Helper in your state's SAR society, and Email or call or write him for assistance in get started with defining your lineage from a patriot ancestor and collecting the documentation required for an SAR application. He will also help you find a member living near you to help you learn about our programs.

Collect and organize the documentation: Tracing your lineage back to your patriot ancestor. Your helper should be familiar with Form #0912 to help with this step. Your Helper may also provide a copy or you can download one here of an SAR Application Worksheet. This allows you to collect the information before you prepare the actual application.

If you have a relative in the SAR, DAR, C.A.R., SR, or a similar patriot descendency organization you may be able to save yourself a great deal of effort by submitting their established lineage and documentation for the part of your lineage where your ancestors are the same as your relative's.

If you know that an ancestor was cited in an SAR application or know the name and SAR number of a relative, your Helper may obtain a "record" copy of that application (marked up by the staff genealogist) for a modest fee.

You can request an Ancestor Search or a Member search from the NSSAR Headquarters using the NSSAR Request Form

If NSSAR has applications on file, you will receive the newest application filed on your ancestor. In case you have asked for an application through a particular child of the Patriot, you will receive that application if available.

There is a similar procedure for requesting DAR application copies. Please visit their

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website for instructions: <http://www.dar.org>

Please check out our [Genealogy Resources](#) and [SAR Resources](#) for other helpful information which may help you document your lineage.

Complete the formal application: On the official form provided by your helper or your helper may offer to do this using data from the worksheet, using one of the programs noted on our [application software](#) page.

Write checks for your application and dues fees: Typical fee structure can be found on our [Application Choices](#) page. Though you will need to contact your Helper or State Society Contact for the actual fees of the Society in which you are joining.

Submit the completed application form: Submit your completed application and all documentation to your sponsoring Chapter for approval (your helper will most likely assist you in doing this). The Chapter in turn will forward your application and documentation to the State Society and then on to NSSAR Headquarters in Louisville.

Wait: The hardest part now begins...Wait! The approval process normally takes 8 to 10 weeks. You will be notified by your sponsoring Chapter if additional documentation is needed at either the State or National level.

Share the pleasure: Once you have been approved share your pride with your family and if your local Chapter or State Society has an induction ceremony invite your family and friends to witness it.

Serve your ancestry and community: Now that you know roots and your ancestry take pride in that fact. Show that pride through personal efforts and SAR activities. Help to promote what many of our Forefathers gave their life to build!

Where Should You Start?

Begin by determining which branch of your family tree leads you by bloodline (not through adopted children) to a Patriot Ancestor; this means that you don't need to know an entire family tree, just a single line back.

Be brave! Even though this branch of your family tree may be seven to ten generations long and you are not sure that you have a patriot ancestor, there are large databases of ancestral chains and records showing links between generations (birth certificates, wills, etc.). Many genealogical societies, Web sites, and lineage organizations provide assistance with family history searches. The SAR has many volunteer helpers to guide prospective members in their development of a lineage to a patriot ancestor. In many cases a quick scan of some of the resources on this site or a linked site could reveal a likely ancestor, promising leads, or suggestions of good references in libraries located near the prospective member.

You will notice to the right various links to some items that can help you get started with your application or your research.

The SAR application requires listing your lineage and must be accompanied by copies of the documents that support this lineage; this means finding documents linking parents to children through seven to nine generations or more. It may seem rather overwhelming at the start, however, the task can be simple if someone in your family has already done some of the research. The other option is to contact one of our [New Member Helpers](#) that can assist you with more research.

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Suggested Induction Ceremony for New Members #1

Chapter President: Compatriot _____, do you, as a descendant of one of the Patriots and Heroes of the American Revolution, reaffirm your ancestor's faith in the principles of Liberty and our Constitutional Republic? Do you? (Response)

And, will you pledge to support The National Society, Sons of The American Revolution? Will you? (Response)

I now take great pleasure in presenting your Membership Certificate.

Compatriot _____ sponsored you into our Society. I would like to ask that he come forward and place the SAR Rosette in the lapel of your coat.

This Rosette is the official Recognition Emblem of the Sons of the American Revolution. Its blue and buff colors represent the colors in the uniform worn by General George Washington. Wear it proudly.

Compatriot _____ we welcome you to the _____ Chapter. We ask that you work with us to fulfill the purposes and objectives of the Sons of the American Revolution.

At this time we would like to invite you to address our members present with whatever thoughts you may have. (Give him time.)

Will all members please come forward and welcome our new Compatriot into the _____ Chapter?

Remember that the SAR is a non-political organization. Chapters and state societies must never endorse or recommend any candidate for public office, nor may meetings include the discussion of merits or demerits of such candidates. The merit of any public question involving the social, economic, moral or physical welfare of the people may be fairly and intelligently studied and discussed at a meeting for the enlightenment of those attending. SAR may take a position on any bill or measure which may be submitted to a vote of the elected representatives of the people or to the vote of the people.

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Suggested Induction Ceremony for New Members #2

Chapter president reads:

Mr. _____, do you as a descendant of one of the patriots and heroes of the American Revolution, reaffirm your ancestors faith in the principles of liberty and our Constitution" Do you? (Response)

Will you pledge to support the National and State Society as well as your chapter of the Sons of the American Revolution? Will you? (Response)

I now take great pleasure in presenting to you this membership certificate. Compatriot _____ we welcome you to the _____ Chapter. We ask that you help us to preserve and enrich our American Heritage by supporting our patriotic, historical and educational objectives with your time, talent and treasure.

Continue with an explanation of the meaning of the SAR Badge as follows.

Explanation of the SAR Badge:

Membership in the Sons of the American Revolution entitles you to wear the medal of the SAR. I now take great pride in describing the symbolism behind the Cross of Malta.

The cross is composed of a horizontal and vertical bar. The horizontal bar represents the first commandment, "You Shall Love Your Neighbor as Yourself." The vertical bar represents the second commandment: "You Shall Love Your God."

Let us focus on the intersection of the bars to remind us the Love of God and neighbor are in fact one and the same love.

There are four limbs of the cross. The limbs remind us of the four cardinal virtues.

The first virtue is prudence learned by studying the past in order to regulate the present and plan for the future. Prudence allows one to understand the fallacy in allowing a lesser evil to avoid a greater evil, because the accumulation of lesser evils will eventually exceed the hypothetical greater evil.

The second virtue is justice. There is an art and science in being just. The art comes from the recognition of the true worth of fellow man. The science involves the concept of impartiality and always begs the question: Is it fair to all concerned? True justice is underscored by an integrity of life.

The third virtue is temperance or moderation in all of our actions including the senses especially the sensual desires.

The fourth virtue is fortitude with magnanimity and courage to serve God.

There are 8 points of the Maltese Cross. Each point represents one of the beatitudes recounted for the knight of Malta by the initiator who would proclaim the following annunciation: "This cross was given white to us as a sign of purity which you must carry in your heart as you wear it externally, without spot or blemish. The 8 points that you see in this are a sign of the 8 beatitudes that you must always have within you and they are:

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1. To have spiritual contentment.
2. To live without malice.
3. To weep over your sins.
4. To humble yourself at insults.
5. To love justice.
6. To be merciful.
7. To be sincere and open hearted.
8. To suffer persecution.

All these virtues you must engrave upon your heart for conservation and preservation of your soul, and for that reason I command you to wear it openly sewn on your clothing on the left hand side of the heart and never abandon it.“

Lastly, our medal has the bust of George Washington at the intersection of the two bars of the cross. This reminds us of our great leader at the time of the American Revolution. Surrounding his bust are the words of *libertas and patria reminding us of our Declaration of Independence and Constitution.*

Chapter President concludes,

Compatriot sponsored you into our society. He will place the (rosette or miniature Maltese Cross if member has purchased it) in the lapel of your coat. This rosette or Cross of Malta is our membership badge. Wear it proudly. Compatriot we welcome you to Chapter and ask you to take a seat among your fellow compatriots.

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Presentation of the High School Bronze Good Citizenship Medal

This would be an appropriate presentation during a high school awards banquet/ceremony.

Good morning, I am _____, member of the:
_____ Chapter, Sons of the American Revolution

It is my privilege this morning to present the:

Sons of the American Revolution Good Citizenship Award

Would _____ please come to the podium?

The National Society - Sons of the American Revolution has, as one of its chief purposes, the stimulation of a vigorous patriotism. We believe that such a purpose is to be secured **only** if the youth in our schools become imbued with the high ideals of character and citizenship.

This award is presented annually to a graduating senior as chosen by the faculty of _____ High School

The four qualities that were considered in making this award are:

- 1 **Dependability**, as evidenced by the record of punctuality, truthfulness, honesty, loyalty, trustworthiness, and self-control.
- 2 **Cooperation**, as evidenced by respect for authority, property, and for the rights of others, and for courtesy.
- 3 **Leadership**, as evidenced by activities the student has participated in to make this school a better place for all.
- 4 **Patriotism**, as evidenced by adherence to principles outlined in the preamble of the Constitution of the United States of America .

We are proud to be able to present the Good Citizenship Medal and Certificate this year to _____.

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The Americanism Awards

Allene Wilson Grove & Liberty Bell Award (State Society & Chapter Activities Competition Award)

The **President General's State Society and Chapter Activities Streamer Award** recognizes chapters and state societies for their efforts to achieve the administrative goals of the SAR and who contribute to the success of the NSSAR. The **Americanism Awards (Allene Wilson Groves Award** for state societies and the **Liberty Bell Award** for chapters) recognizes the societies and chapters that participate in outreach education efforts and who acknowledge community leaders for their efforts to perpetuate the goals of the SAR. The **President General's Cup** recognizes the chapter that best achieves the goals of both the President General's and Americanism Awards.

Beginning in 1978 (last revised in 2014), chapters and state societies compete by accumulating points awarded for participation in various SAR activities. The competition runs from **January 1st to December 31st**. Completed entries should be mailed via certified mail with return receipt or via email to the National Americanism Committee Chairman no later than **March 1st**. **To be considered a complete entry, this form must have all tabs completed and be received in its entirety by the National Americanism Committee Chairman by 11:59 pm (Eastern Time Zone) on the day stated as the deadline.** Supporting documentation may be asked for if necessary

For the purpose of calculating the winner of the President General's Cup, no individual score sheet category may count for more than 20% of the total score. No chapter will be eligible for this award unless it has scored points in at least 75% of the score sheet categories. The chapters in the President General's Cup competition will be judged using a weighted equation on a per member basis.

Awards:

Four (4) first place Liberty Bell awards, four (4) President General Streamer awards and four (4) President General's Cup awards will be presented to chapters based on membership groups of 1 to 49; 50 to 99; 100 to 199; and 200 or more members. **Two (2) first place Allene Wilson Groves awards** will be presented to state societies based on membership groups of 1 to 999 and 1,000 or more members. **Four (4) first place President General Streamer awards** will be presented to state societies based on membership groups of 1 to 199; 200 to 499; 500 to 999; and 1,000 or more members. A state society or chapter may not win in two (2) consecutive years unless there are no other entries in that category in the second year. When a chapter or state society is ineligible to win but would have won based on point totals, then that chapter or state society will receive an Honorable Mention.

General Guidelines:

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- (1) All entries must be submitted in Excel or other editable spreadsheet format or it will not be accepted and returned for correct submission.
- (2) Membership is defined as current, paid up members, regardless of membership class, at January 1st (start of the contest year) and at December 31st (end of the contest year). The January 1st total determines the classification the entry will be placed in. The December 31st total is used to calculate the per capita total for the PG Cup contest.
- (3) A chapter or state society may only count the activities of those SAR members who are primary members of that chapter or state. Compatriots participating in an event outside the boundary of their primary membership state society will earn points for their primary chapter and state society regardless of where the event is located.
- (4) Stated maximum number of points apply to chapters only. State Societies may accumulate points in excess of the stated chapter maximum in any category unless a specific state society cap is stated on the tab.
- (5) In order to encourage compatriots to participate in Revolutionary War era uniforms or clothing, additional points may be earned for the wearing of a uniform or period attire. No additional points may be earned for carrying or firing a firearm at an event since laws allowing such firing vary from location to location.
- (6) Points may be earned for awarding a medal or certificate to an individual; however, points may not be earned for awarding a Certificate of Appreciation to that same recipient. For example, if a JROTC medal is presented to a cadet, points cannot be earned for presenting that same entrant a Certificate of Appreciation.
- (7) In order to earn points for conducting a youth contest or other program, there must be at least one (1) named contestant / participant in the program.
- (8) Where specific data entry is indicated, be sure to enter the specific data in the format requested. Failure to do so will result in no points being generated. For example, if a section states "Mark with an 'X'", then enter "X"; if it calls for "Uniform", enter "Uniform." Any other entry will result in no points.
- (9) Abbreviations should be avoided if possible and as much descriptive language should be used given constraints of the provided cell sizes to avoid misunderstanding the data entry.

Americanism

National

1. Publicity in commercial newspaper or periodical publications where the SAR is prominently displayed, depicted or described.
2. Television Coverage: For coverage of at least 10 seconds where the SAR is prominently displayed, depicted, or described.
3. SAR Speakers Bureau
4. Multimedia Distribution
5. Youth Programs
6. Public Service Programs
7. Granting of Scholarships
8. Veterans Support

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9. Special Observances and Ceremonies
10. Revolutionary Era Grave Markings
11. SAR medals presented to non-SAR members

North Carolina

1. Chapter publicity
2. Chapter Newsletter
3. Chapter Scrapbook

President General's Streamer Award

National

1. Support of the CAR and DAR
2. Compatriot Grave Marking
3. SAR Medals presented to SAR members
4. Service to the National Society
5. Member's Reinstatement, Dues and Secretary Reports
6. Attendance at State, District and National Meetings
7. Contributions to the National SAR

North Carolina

1. Contributions to North Carolina SAR
2. Documentation of NC SAR Patriot Grave Marking
3. Chairman of State Committee
4. Membership on State Committee
5. North Carolina SAR Leadership position

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Sample Americanism Summary Scoresheet



North Carolina Society Sons of the American Revolution Americanism Award / State President's Streamer Combined Score Sheet

Chapter Entry

Deadline for Submission is **31 Jan.**

Completed entry forms must be submitted via US Mail and/or via email.

The NC Americanism Committee Chairman's contact information can be found on the NCSSAR webpage.

Chapter chairmen are asked to complete all information.

Chapter chairmen should send the completed forms to their state chairman as well to the National Chairman.

State chairmen will then compile this data to include in the state entry.

Chapter Name:		Chapter President:	
State Society Name:	North Carolina	State President:	
Contest Year:	2014		
Membership as of:	January 1st:	December 31st:	
Submitter's Name:		Contact Email:	
Telephone (Work):		Telephone (Home):	
Date Entry Submitted:			

<u>Category</u>	<u>Category Title</u>	<u>Americanism</u>	<u>President Streamer</u>
1	Publicity from Print Media	0	
2	Publicity through Public Broadcast Media	0	
3	SAR Speakers Bureau	0	
4	Multimedia Distribution	0	
5	Support of the CAR and DAR		0
6	Youth Programs	0	
7	Public Service Programs	0	
8	Granting of Scholarships	0	
9	Veterans Support	0	
10	Special Observances and Ceremonies	0	
11 A-D, G-H	Revolutionary War Era Grave Markings	0	
11 E-F	SAR Compatriot Grave Marking		0
12A	SAR Medals & Certificates Awarded to Non-Members	0	
12B	SAR Medals & Certificates Awarded to SAR Members		0
13	National Society Service		0
14	Membership, Reinstatements, Dues, Secretarial Returns, etc		0
15	Attendance at State, District, and National Meetings		0
16	Contributions to the SAR		0
17	NCSSAR Inputs		0
		0	
TOTAL POINTS:		0	0

Last Revised: 8 Mar 2014

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The USS Stark Memorial Awards

(State Society & Chapter Activities Competition Award)
& Service to Veterans Guidelines

In 1988, the NSSAR authorized, THE USS STARK MEMORIAL AWARD to memorialize those brave men and women who continue to stand at the forefront to preserve the freedoms our patriotic ancestors fought so long and hard to achieve. Its purpose is to recognize outstanding Chapters and the most outstanding State Society within the National Society of the Sons of the American Revolution for their participation in Veterans Committee activities.

The period of program activities will be from January 1 through December 31 of the following year. Chapter activities are to be recorded by the Chapters Veterans Committee Chairman and reported to the State Veterans Committee Chairman by January 15. The State Chairman files a report to the State Society President by February 1. The State Veterans Committee Chairman will report all activities to the Executive Director at National Headquarters and the Veterans Committee Chairman by February 15. **The Veterans Committee will judge the submittals at the Spring Trustee Meeting.**

Awards to recognize the State Society and Chapters which collectively participate most actively with the programs of the Veterans Committee. The winning State & Chapters will have its name and year engraved on a plaque and a streamer issued for attaching to the State SAR flagstaff and Chapter SAR flagstaff. First place streamers will be awarded to the most active Chapters by the following membership size:

- 10 to 49
- 50 to 99
- 100 to 199
- and over 200

The USS Stark awards are presented by the National Society at an Annual Congress for the most complete Veterans program.

Activities should conform to the chartered purposes and to the type of activity suggested in the SAR Handbook. Rules and requirements for these awards are as follows:

Chapter member(s) appointed to Veterans Adm. Councilor equivalent organizations
Each HOUR served in VA Volunteer Service capacity
Each SAR member visiting a confined Veteran in a VA Hospital, Nursing home or home
Each GIFT donated to Veteran in VA Hospital or nursing home.
Each dollar donated to VAVS projects & coupon books.
Each PUBLICATION donated to VA Library or Reading Room.
Each VETERAN OUTING or Party that includes Veteran patients
Special OBSERVANCE Sponsored by chapter with other veteran organizations.
Participation in the Wounded Warriors Program by presenting Veterans the S.A.R.
Wounded Warriors Certificate and Challenge Coin.

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Participation in the Operation Ancestor Search Program by assisting Veterans to build their own 'family tree' by the use of computer genealogy.

Special OBSERVANCE attending in cooperation with other veterans organizations.

Marking Revolutionary Patriot War Veteran's and compatriot graves.

Initial Revolutionary Grave Dedication

Attendance at Revolutionary Grave marking.

C. Flag placement on a Veterans Grave

D. Patriot Grave Registry donation to NSSAR

E. Participation in a Veteran's Funeral

New or Used Clothing – Men's and Women's

All new or used but working items: such as TV's, Computer's, etc.

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Service to Veterans Medal

In 2002 the NSSAR authorized the creation of the SERVICE TO VETEANS Medal to be presented to the individual Compatriot that has supported the Veterans program and able to document 5000 points. An individual may count points for the LAST five years, BUT only the point that pertain to the current calendar year may be reported on the USS Stark Memorial Competition for the current year.

The local chapter or Society presents the Service to Veterans Medal. The Service to Veterans Medal may be presented at any time that the local chapter or Society approves the Medal.

Service to Veterans Medal



1. This medal will only be awarded to SAR members.
2. This medal will be awarded when a Compatriot has contributed 5,000 Stark points; (These points can be a combination of time given, clothing and/or money donated, or other items based on the USS Stark Award score sheet)
Each individual is responsible for recording his personal point accumulation.
The chapter Veteran's Committee Chairman must verify these points.
Point will be retroactive for previous Veterans activities, if points awarded are duly documented.
6. For multiples of 3,000 point a bronze oak leaf cluster will be awarded.
7. After 5 bronze oak leaf clusters have been presented, a silver oak leaf cluster will be presented to replace the 5 previous bronze clusters.
8. A certificate of accomplishment will accompany the medal and each cluster.
9. The chapter or state may present this award
10. The cost of the award will be paid by the awarding organization.

For more information or questions

https://www.sar.org/Committees/Veterans/Service_to_Veterans_Medal

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Reconciliation

The Reconciliation form is to be used by States. In addition to providing a standardized format for reporting all the changes in membership year over year, the new Reconciliation Form also calculates the amount of dues that the society owes to the National Office. In future years, the form can be updated to include any changes in dues or membership categories. There are instructions and a Chapter format as well. (Both can be found in the forms section)

The 2013 template has been tested by a number of state society secretaries across the nation to find any formula errors and to identify potential issues. The template that is now available is the result of this testing. The version of the template that you should be using has the following time / date stamp on the Cover Sheet: "Last Updated: 20 May 2013 – 800 hours MCA".

The major change for this year is that all positive additions to the society are entered on a single page. Also, Memorial memberships can now be correctly entered as both an addition and subtraction.

Please note that if you have been keeping track of the 2013 membership on the previous form that data does not need to be entered over again. If desired, that data should be **COPIED & PASTED** into the new template. **DO NOT CUT & PASTE** as that will corrupt the embedded formulas in the spread sheet.

As always, if there are any issues, please contact the National Office and they will forward all questions and issues to the appropriate volunteers for follow up.

State Societies are required to provide an Annual Membership Reconciliation Report when remitting annual dues to the National Office. The North Carolina Chapter suspense to the State Secretary is 15 December. **This report is due to the National Office no later than January 31st** as outlined in Bylaw 2, Section 6 (National Handbook, Vol. 1, pg. 7). The Registration Education & Reporting Committee created this worksheet in 2009 to normalize the report format, speed up the time to reconcile the filed reports and to provide easily quantifiable data to research membership trends.

The Reconciliation Form is provided in an Excel Spreadsheet format (though it can be completed manually by printing out all tabs) allowing embedded formulas to quickly calculate the required numeric data. As such, the user can only enter data in specific cells on each tab. The user is only allowed to enter data in the uncolored cells. Though hokey, *"if it's white, then you can write."* **If desired, data can be COPIED & PASTED. DO NOT CUT & PASTE** as this will corrupt the embedded formulas.

Each data entry tab is labeled to indicate the type of data that is to be entered. Users should enter only the required data in the format that is called for. On each tab, there is a

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column where the user must enter a specific numeric or alpha code for the spreadsheet to correctly calculate the data. **Example:** "Junior Member (Y/N)" on the Additions tab. The user must enter either "Y" for "yes" or "N" for "no." Any other entry including "yes" or "no" or even adding a space after the letter will NOT be seen as a valid response and the data will not calculate correctly. The following tabs are provided for data entry:

(1) Additions: Initial data entry is the State Society name, the year for which the reconciliation is being done and the total membership number as of the start of the year being reconciled (taken from the signed reconciliation confirmation sent to the state society by the national registrar). Next, enter the name, national number, month & day of approval for each new member added during the year. Indicate the appropriate transaction type (codes provided at the top of the tab).

(2) Losses: Enter the name, national number, date of transaction and the transaction type (codes provided at the top of the tab) for all members whose membership ceased during the year being reconciled. **THIS DOES NOT INCLUDE END OF YEAR DROPS.**

(3) Drops: Enter the name and national number of the members who did not pay annual dues for the subsequent year by the established December 31st deadline.

(4) Jr Members: Enter the name, national number and date of birth of **ALL** existing Junior Members (*those approved prior to the year being reconciled*) AND all Junior Members approved during the year being reconciled. Indicate if the approval of membership occurred in either November or December of the year being reconciled for Junior Members approved during the year being reconciled.

(5) Emeritus: Enter the name and national number of all members who qualify Emeritus membership status as defined in Bylaw 19, Section 8 (National Handbook, Volume 1, page 24)

(6) Natl Life: Enter the name, national number and national life member number of all members who qualify for National Life Membership as defined in Article III, Section 1 (National Handbook, Volume 1, page 1)

(7) Cover Sheet: *There is no data entry on this form as all data is pulled from the previous six tabs.*

(8) Dual Members: Compatriots who are members of other state societies and pay national dues through their home state.

(9) State Life Members: Compatriots who have paid North Carolina State Dues for life

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Sample Summary Sheet for Reconciliation

North Carolina Society Cover Sheet

Annual Reconciliation
Report for
Due to state treasurer by
January 1

Alamance
Battleground

Chapter

Membership
Reconciliation

Item	Active membership as of January 1,	<input type="text" value="2015"/>		49
1	Plus: New members			0
2	Plus: New Junior Members			0
3	Plus: New Memorial Members			0
4	Plus: Reinstatements			0
5	Plus: Reinstatements- Transfers			0
6	Plus: Transfers In			0
7	Plus: Dual Members			0
8	Total Chapter Additions			0
9	Less: Deceased			0
10	Less: Deceased Memorial Members			0
11	Less: Transfers Out			0
12	Less: Resignations			0
13	Less: Dropped			0
14	Less: Emeritus Members			0
15	Less: Junior Members			0
16	Less: State Life Members			0
17	Less: Nov/Dec Regular Members			0
18	Less: Nov/Dec Reinstatements			0
19	Less: Nov/Dec Reinstatements/Transfers in			0
21	Total Chapter Adjustments			0
22	Total Active Members as of January 1	<input type="text" value="2016"/>		49
23	NC State Dues Amount			\$20.00
24	Total Billable State Dues			\$980.00
25	Total Billable National Dues			\$1,470.00
	Total Dues to send to NC State Treasurer			\$2,450.00

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Chapter President's To-Do List

- Review NC Handbook, Vol 2, Chapter Leadership <http://www.ncssar.org/forms/>
- Review NC Handbook, Vol 1 <http://www.ncssar.org/forms/>
- Review/Update Chapter website <http://www.ncssar.org/chapters/>
- Ensure National Member Database is current http://www.sar.org/Member_Database
 - Address, Phone number and e-mail address for each member
 - Medals awarded to chapter members (District VP and Senior VP will assist)
 - Current officers assigned to "Positions Held" <http://www.sar.org/node/381>
- Report to National SAR leadership
 - Americanism report <http://www.sar.org/node/283> Due Date: 3/1
 - Partners in Patriotism report when completing activities with Veterans Organizations <http://www.sar.org/node/1532> Due Date: 12/31
 - Stark report <http://www.sar.org/node/338> Due Date: 2/1
 - Reconciliation report <http://www.sar.org/node/401> Due date: 1/31
 - IRS Form 990N [https://www.irs.gov/Charities-&-Non-Profits/Annual-Electronic-Filing-Requirement-for-Small-Exempt-Organizations-Form-990-N-\(e-Postcard\)](https://www.irs.gov/Charities-&-Non-Profits/Annual-Electronic-Filing-Requirement-for-Small-Exempt-Organizations-Form-990-N-(e-Postcard)) Due Date: 5/31
 - Death of Compatriot <http://www.sar.org/node/258> Due Date: ASAP
 - Change of Officers <http://www.sar.org/node/381> Due Date: ASAP
- Report to State SAR leadership
 - Americanism report (See NC SAR Web Site) Due date: 1/15
 - Stark Report (See NC SAR Americanism Report) Due date: 1/15
 - Reconciliation Report (Contact NC SAR Secretary) Due date: 12/31
 - Change of Officers https://docs.google.com/forms/d/1GHwtXggIDp-vJPxCJcJW1PRTpQYOBecDCo30U3JkC_w/viewform Due date: ASAP
 - State of the Chapter Report – Annual Meeting Due date: 30 days before
 - Board of Managers Report (Winter and Summer) Due date: 30 days before
- Award SAR awards to community members
 - Bronze JROTC medals
 - Eagle Scout Recognition
 - Flag Certificates
 - Community Service (EMS, Fire Department, Law Enforcement)
 - Bronze Good Citizenship Medals
 - Martha Washington (DAR)
 - Medal of Appreciation (DAR)
- Award SAR medals to chapter members
 - Military Service or War Service <http://www.sar.org/node/78>
 - Distinguished Service <http://www.sar.org/Catalog/Medals-and-Awards/NSSAR-Service-Medals/Chapter-Distinguished-Service-Medal-Full-size-mini-an>

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- Bronze Roger Sherman <http://www.sar.org/Catalog/Medals-and-Awards/NSSAR-Service-Medals/Bronze-Roger-Sherman-Medal-Full-Size-mini-and-certifi>
- Bronze Good Citizenship
- Bronze Color Guard
- Chapter Meritorious Service Medal

Chapter President's Reports to North Carolina Society

Board of Managers (BOM) Report Template

- Current Officers and contact information (President, VP, Secretary, Treasurer, Registrar and Color Guard Commander as applicable)
- Current membership status
- Chapter/President's activities conducted since last BOM Meeting
- Planned chapter meetings/events before next BOM
- Status of completion of state president's goals

Annual Meeting Report Template

- Current Officers and contact information
- Membership status following reconciliation
- Status of achievement of chapter goals from previous year
- Goals for chapter for the following year