



OFFICIAL HANDBOOK

*North Carolina Society*

of the

*Sons of the American Revolution*

*Volume 2*

*Chapter Leadership*

*April 7, 2021*

**NC SAR Handbook Vol 2, Chapter Leadership**  
**April 2021**

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### North Carolina SAR Organization

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-eight (28) Chapters divided into five (5) Districts, each governed by a District Vice President.

### Forming a New Chapter

The local Chapter is the most important link between the individual Compatriot and the State and National Societies. It is through the collective works performed by members of local chapters that the goals and objectives of the State and National Societies are best achieved. Wherever local membership grows, members are encouraged to organize new Chapters, whenever possible, so that it is convenient for them to attend local meetings and events. Membership growth should be emphasized continually. New chapters should be organized whenever possible. The information presented below is designed as a guide to help Compatriots undertake the formation of a new local Chapter. This information may also be used to re-establish a Chapter whose charter was been revoked or returned.

1. NC Society Compatriots residing in or adjacent to an area where a new Chapter is desired shall be called together from time to time to attend all pre-organizational meetings to discuss the feasibility and the progress toward forming a new Chapter. Pre-organizational meetings are meetings of prospective chapter members held before a charter is granted by the Board of Managers.
  - a. The Society is currently formed into 5 regions (see State Chapter location map posted on its website. The Regional Vice President should be contacted and invited to the pre-organizational meetings to provide advice and guidance. A list of the current Regional Vice Presidents is provided on the NCSSAR website. He will also be a resource throughout the chartering process and serve as a mentor for the new chapter. He will provide the contact information of those current Members who reside in or adjacent to the proposed Chapter

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location. He is also responsible for ensuring that a specific member is identified who will be responsible for providing assistance in the preparation of new member applications in the new chapter. As the mentor, he will inform the members regarding local and state wide SAR events and meetings. This will help the members assimilate into the state societies and events.

- b. A Sponsoring Chapter will be determined where all existing and new Members could be assigned until the Chapter Charter is granted by the Board. A Sponsoring Chapter is typically the nearest (physically closest) existing chapter that is in best position to support the startup and mentoring of the proposed new chapter. Until that time, prospective Members of the proposed Chapter are encouraged to attend and participate in all meetings and events of the Sponsoring Chapter in a mentorship capacity so they can learn the basic state operating procedures and SAR traditions. The Sponsoring Chapter will also formally induct all New Members when their SAR membership applications are approved. The Sponsoring Chapter shall be responsible for collecting all dues, fees, and donations of all the prospective Members. Once the Chapter Charter is granted and the new Chapter establishes a checking account, the Sponsoring Chapter will transfer those funds collected from new Chapter members. [Note: The Sponsoring Chapter will qualify for 100 points in the Americanism Report under Tab 14 Membership, Reinstatements, Supplementals, Dues & Secretarial Returns, Section 14a Sponsorship of a New Chapter during the Contest Year.]
  - c. Local members of the DAR who express an interest in being of assistance should be invited to attend pre-organizational meetings, especially in recruiting new SAR members. DAR members who assist are eligible to receive recognition (i.e., certificates and medals) from the Chapter for their efforts.
  - d. The forming Members should reach out to the local communities (via newspaper or media notices) to announce the forming of a new local SAR chapter. Pre-organizational meeting announcements should invite all interested in the SAR organization, establishing connections with local patriotic societies (e.g., VFW, American Legion, etc.) and offer support for candidate SAR members with genealogy and family searches.
2. A minimum of ten Society members in good standing are required to form a chapter and submit a petition for a charter. Dual members may not be counted in this minimum number. Dual members are members who maintains their primary membership in: (1) another State Society or (2) another Chapter with no intention to transfer their primary membership into the new chapter.
  3. A Petition (Application for a Charter – page 9) containing the location, proposed chapter name, and the names of the petitioners to form a new chapter is completed and

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signed. A proposed set of chapter bylaws should also be created and should be consistent with the NC Society Bylaws.

4. The Petition including the proposed set of Chapter Bylaws shall be submitted to the State Secretary no later than 14 days prior to the next scheduled Board of Managers meeting. The State Secretary will distribute the Petition and proposed Chapter Bylaws to the Board for its consideration in granting a Charter to the proposed new Chapter and authorize the adoption or modification of its bylaws so they are consistent with those of the NC Society.

5. Following the submission of the Charter Application and upon its approval by the Board, the State Secretary shall:

a. Submit a request to NSSAR Registrar General that the new Chapter be added in the Membership Data System so that existing SAR Members can then be transferred into the new Chapter. Said request must include the Application and list of its newly installed Chapter Officers.

b. Notify the National Society's general officers of the formation of a new Chapter and request they send greetings and congratulations to the new Chapter. Ample time should be allowed for them to send their greetings. These greetings should be read at the Chartering ceremony for the new Chapter and these letters received shall then be placed in a new Chapter's scrap book and/or historical records.

c. Order a Chapter Charter from National SAR Merchandise. [Note: If desired, the Charter may be kept open for a period of 90 days to permit prospective members to file their applications and sign as "charter members."]

d. Submit a request to the Chairman of the George Washington Endowment Fund (GWEF) Distribution Committee for a SAR Chapter Starter Kit. [NOTE: The Chapter Starter Kit includes the following items: (1) Podium Banner [SKU #1375]; (2) US/SAR Flag Desk Set [SKU #1337]; and (3) SAR Prayer Book [SKU #1022]. These items are to be presented to the new Chapter at their Charter ceremony. The Chairman of the GWEF Distribution Committee will require the following Information be provided:

- 1) Name of the new Chapter & its Location.
- 2) Who is requesting the Starter Kit and a complete shipping address.
- 3) Date when the Chapter will be Chartered and by what date the Starter Kit is needed.

e. Purchase from the SAR Store the following items:

- 1) a gavel [SKU #0700];
- 2) a Chapter President Neck Ribbon for the new Chapter President [SKU #0393]; and
- 3) a Chapter Charter certificate [SKU #0930].

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Note: Funds for the purchase of these items will be paid by the NC Society.

6. After approval of the Petition for a new Chapter Charter by the Board, the organizers of the new Chapter shall:

- a. Immediately schedule its first organizational meeting at which time the new chapter officers are duly installed by the President of the NC Society, and the Charter is formally presented. The Regional VP should provide a list of upcoming scheduled State and National commemorations and meetings to avoid schedule conflicts.
- b. It is essential during this organizational meeting that the Charter Ceremony be conducted with dignity and decorum and shall follow established criteria per the NC Society Handbook.
- c. The newly installed Chapter President shall run the meeting, shall Induct any new SAR Members who have not previously been inducted, and shall welcome existing SAR Members who joined the new Chapter.
- d. To help celebrate the establishment of the new Chapter, consider having refreshments or a meal following the chartering ceremony and installation of officers, if possible, to which members and guests are invited.

7. Following approval of the chapter Charter:

- a. The Chapter Secretary will:
  - 1) File a copy of the chapter bylaws, a list of officers and a list of members with the state secretary; and
  - 2) File a list of chapter officers with the National Administration Coordinator.
- b. The Chapter Treasurer will:
  - 1) Contact the National Director of Finance who will assist the chapter in obtaining a 9-digit Tax Identification Number for the new chapter. That number must be linked to the NSSAR's group exemption number (0690) meaning that the subordinate organization carries the rights and obligations of an organization exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code; and
  - 2) Contact a local bank to determine the required documentation to establish a checking account as a non-profit business enterprise.

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**Application for a Charter**

To: The Board of Managers of the North Carolina Society of the Sons of the American Revolution

COMPATRIOTS: The undersigned Members of the North Carolina Society of the Sons of the American Revolution, residing in North Carolina, respectfully apply for the privilege of organizing a Chapter within the said area, and in pursuance of and according to Bylaw No. 2, Section 6 of the National Society, and in accordance with Article XII of the Bylaws of the North Carolina Society of the Sons of the American Revolution. The Chapter which hereafter will be known as

\_\_\_\_\_

shall have its headquarters at \_\_\_\_\_ in the County of \_\_\_\_\_,  
or at such place within the said area of North Carolina as may hereafter be determined by the said Chapter, and the following are the names and residences of the members thereof:

Dated this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_

NAME & NATIONAL NO.	RESIDENCE	SIGNATURE
_____	_____	_____
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### Typical Chapter Officer Responsibilities

President shall:

1. Maintain general supervision over the Chapter and ensures the chapter operates within the Bylaws
2. Conduct periodic, planned chapter meetings – see NC SAR Handbook Volume 2, *Chapter Leadership*
3. Assign committee members and appoints committee chairmen. Develops new committees, as needed
4. Assign Ad Hoc Committee to conduct a financial review of the Treasurer's books annually
5. Calls Officer election per Chapter bylaws. Requests State President or Regional VP to install new officers
6. Ensure chapter meetings are well planned and there is an agenda for each meeting. Notify members in advance of upcoming meetings and events.
7. Direct the recruitment of new members and retention of current members.
8. Set recruiting goals for the year
9. Notify new members of their approval and inducts them into the SAR. Ensure new members receive indoctrination training and assigned a Mentor.
10. Oversee the retention efforts of current members through surveys, interviews, and engagement
11. Actively plan and oversee all chapter sponsored events ensuring compliance with NSSAR protocol.
12. Working with the VP, reward deserving members – see NC SAR Handbook Vol I, Chapter 11 Medals & Awards
13. Ensure the timely and accurate submission of required reports:
  - a. Board of Managers and Annual Convention reports
  - b. Reconciliation Report
  - c. Americanism, Flag, and USS Stark Memorial reports
14. Attend called meetings of their Regional VP and attends at least one (1) of the three (3) State meetings during a calendar year. These three meetings are defined as the two BOM meetings and the Annual meeting. If you cannot attend, then send a proxy.
15. Attend chapter meetings

Vice President shall:

1. Preside over the chapter in the absence of the President
2. Assist the President in carrying out his duties
3. Assist in the planning, location selection, and agenda of chapter meetings and events
4. Administer the training program for members.
5. Conduct SAR fundamentals training of new members, issues New Member Guidebook, and assigns a Mentor.



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6. Conduct the training of Mentors and Chapter Officers
7. Manage the Retention efforts of current members through surveys, interviews, and engagement
8. Chair the Program Committee (i.e., lines up the speaker for chapter meetings)
9. Chair of the Awards, Planning & Budget, and Membership Committees
10. Attend chapter meetings

#### Secretary shall:

1. Conduct general correspondence of the chapter.
2. Record, publish, and maintain a permanent copy of the chapter meeting minutes.
3. Assist the President in preparing Chapter BOM and Annual Meeting reports to the State Secretary
4. Maintain chapter files not the responsibility of another officer such as rosters, new members, deceased members, correspondence, and membership information
5. Update the Members Data System with member addresses, phone numbers, and email addresses
6. Work with the Treasurer on the completion and submittal of the Annual Reconciliation Report
7. Notify the State Secretary of the death, resignation or removal of any member; and also change of officers
8. Attend chapter meetings

#### Treasurer shall:

1. Keep accurate account of receipts and expenditures
2. Maintain a finance system that is capable of:
  - a. Receiving and securing income
  - b. Dispersing funds to pay expenses
  - c. Reporting on the financial status of the chapter
3. Receive all chapter income including member dues
4. Pay all expenses authorized by the President, per the approved budget, and/or voted on by the members
5. Working with the Secretary on roster of paid members, collect/submit member dues and the Reconciliation Report to the State Secretary in December each year
6. Annually by May 15, submit online the IRS 990-N form to maintain your chapter's non-profit status
7. Assist with the annual financial review of records
8. Attend chapter meetings

#### Registrar shall:

1. Per NC SAR Handbook Vol 5, *Registrar's Handbook*, receive/review new and supplemental applications for:
  - a. Fee is included.
  - b. Application form is complete and properly prepared
  - c. All dates are present and in the correct format
  - d. Applicant and sponsor have signed

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- e. All proof documents are present, appear authentic, and are appropriately marked-up in red ink
2. Input data into on-line application for the applicant
3. Forwards the application, proof and fee to the State Registrar
4. When the Chapter has no Genealogist, perform duties of the Genealogist.
5. Attend chapter meetings

### Genealogist shall:

1. Conduct genealogical workshops
2. Assist potential applicants for membership in preparing their membership applications
3. Assist the Registrar in reviewing new and supplemental applications per NC SAR Handbook Vol 5, *Registrar's Handbook*, specifically:
4. Help with a challenging family tree connection to a Patriot Ancestor
5. Find authentic proof of generational levels
6. Referred proof is present and appears authentic
7. Act as the Registrar in his absence
8. Attend chapter meetings

### Historian shall:

1. Record all significant events/activities of the chapter each year.
2. Record a 1-2-page history of the chapter's events/activities each year. List such items as:
  - a. Chapter officers
  - b. Grave markings
  - c. Color Guard activities
  - d. Significant chapter meetings such as officer installation, inductions, and banquets
  - e. Chapter and Individual Awards
3. Attend chapter meetings

### Chaplain shall:

1. Lead the Invocation and Benediction at Chapter meetings and events
2. Send a sympathy card to the family members of deceased Chapter Compatriots
3. Attend chapter meetings

### Webmaster shall:

1. Posts update, news articles, pictures, and events pertaining to their chapter to their chapter homepages on the NC SAR Website or their own chapter website.
2. Attend chapter meetings

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### Chapter President Protocol

#### A. Neck Ribbon

The neck ribbon with the suspended SAR badge should be worn at all official SAR functions and public occasions where you are a representative of your Chapter. The ribbon is worn with white tie, black tie, the dinner jacket, business suit coat or blazer. It is worn over the tie and under the turned over collar and is drawn up to within one inch below the bow or four-in-hand tie. For a button-down collar, the neck ribbon is placed over the collar. Neither the membership rosette nor the miniature SAR Badge should be worn in combination with the neck ribbon. The only insignia that may be worn on the neck ribbon are: Supplemental Stars, Past President's Pin, Trustee Pin, and Vice President General's Emblem.

#### B. Guides for Conducting Ceremonies

It is desirable to have formal Chapter functions conducted in a dignified manner. The following are offered as a guide that can be used by the Chapter at its discretion. The gavel should be used at the start of each meeting. As a guide, the order should be to God, Country and then SAR, in that order, at the start of each meeting and in the reverse order at the end of each meeting. (See the Chapter Leadership Handbook for specific guidance.)

#### C. Installation of Chapter Officers

Have all Elected Officers please assemble at the front.

Please raise your right hand:

Gentlemen, having been duly elected to office in the \_\_\_\_\_ Chapter, Sons of the American Revolution, do you promise and swear to support and defend the Constitution of the United States of America and the Constitution and Bylaws of the National Society, Sons of the American Revolution; and do you further promise and swear that you will faithfully discharge the duties of your office to the best of your knowledge and ability, and that you will, at all times, conduct yourself in a manner worthy of our Society, so help you God? Do you?

Response: I do.

To the Compatriots of the \_\_\_\_\_ Chapter:

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I have just given your new officers their charge. I now wish to remind you of your obligation to them: Assist them, support them and encourage them in the discharge of their duties, thus furthering the principals and purposes of the Sons of the American Revolution.

### D. Installing New Chapter President

President \_\_\_\_\_, I place about your neck the insignia of your office. This insignia represents the authority invested in you by your Compatriots of the \_\_\_\_\_ Chapter. They have bestowed a great honor on you and at the same time you have accepted a grave responsibility. When wearing the insignia, be ever mindful of the duties and responsibilities which go hand in hand with the honor and dignity of your office. Strive diligently to fulfill the pledge you have just taken.

President \_\_\_\_\_, it is now my sincere privilege to present you with this gavel, as a symbol of the authority now vested in you. Wield it always with dignity, honor and temperance. President \_\_\_\_\_, please honor us with a few remarks.

Brief remarks by President \_\_\_\_\_:

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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, Bylaws, 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 Handbook Volume II)

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

1. 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.

2. Encourage members to acquire and wear Revolutionary War era clothing and join the Color Guard. As the "Face of the SAR", Compatriots wearing a Revolutionary War era uniform or clothing honors our Patriot Ancestors, enhances the public image of the SAR, encourages a sense of common cause and comradeship, and acts as a recruiting symbol. Create a Color Guard unit of 4-5 members capable of performing local Color Guard events or giving presentations/awards at local schools or community events. Compatriots who acquire a complete Revolutionary War era clothing for the first time and participates in a Color Guard function or other SAR-related activity while wearing their RW era outfit are eligible for \$100 reimbursement from the NC SAR under the Revolutionary War era Outfit Reimbursement program. See <https://www.ncssar.org/wp-content/uploads/2020/03/SAR-Revolutionary-War-era-Outfit-Reimbursement-Form.pdf>.

3. 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.

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- 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.

4. 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 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.

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

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

7. 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.

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

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

10. 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.



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

12. 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](http://vetcorps.info) website. It is recommended that the chapter formally present the medal at a meeting or fitting ceremony.

13. 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 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.

14. 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.

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If you have a relative in the SAR, DAR, C.A.R., SR, or a similar patriot lineage 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 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

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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.

## *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

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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.

## *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.

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**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:

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 2020 to accommodate virtual activities due to COVID-19 restrictions), 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 using the number of chapter members on December 31<sup>st</sup>.

Awards:

At National Congress, 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 40; 41 to 90; 91 to 150; and 151 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.

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**Thomas “Nat” Clark Outstanding Chapter** – This award will be based upon combined scores for the NC Americanism and NC President General’s Streamer divided by the number of members in the chapter on December 31<sup>st</sup>.

- Small Chapter (1-40 members)
- Mid-Size Chapter (41-90 members)
- Large Chapter (91-150 members)
- Very Large Chapter (151 or more members)

**NC Americanism Streamer** – This award will be based on the highest scores achieved by a chapter for the combined NSSAR Americanism and NC Americanism scores.

- Small Chapter (1-40 members)
- Mid-Size Chapter (41-90 members)
- Large Chapter (91-150 members)
- Very Large Chapter (151 or more members)

**NC President’s Streamer** – This award will be based on the highest scores achieved by a chapter for the combined NSSAR President General’s Cup and NC President Streamer scores.

- Small Chapter (1-40 members)
- Mid-Size Chapter (41-90 members)
- Large Chapter (91-150 members)
- Very Large Chapter (151 or more members)

General Guidelines:

- (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.



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(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 Scoresheet Reporting Areas

### *National*

1. Media Publicity in commercial newspapers, periodical publications, television, social media, or radio where the SAR is prominently displayed, depicted or described.
2. SAR Speakers Bureau
3. Youth Programs
4. Public Service Programs including Veteran Support
5. Historic Sites and Observances
6. Patriot and Compatriot Grave Markings
7. Color Guard
8. Medals and Awards to Non-SAR members

### North Carolina

1. Chapter publicity
2. Chapter Newsletter
3. Helping to achieve State Strategic Goals

## President General's Streamer Reporting Areas

### *National*

1. Support of the C.A.R. and DAR
2. SAR Medals presented to SAR members
3. Service to the National Society including contributions/donations
4. Member's Reinstatement, Dues and Secretary Reports

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## 5. Attendance at State, District and National Meetings

### *North Carolina*

1. Contributions to North Carolina SAR
2. State Officer
3. Membership and/or Chairmanship on State Committee

## **The USS Stark Memorial Awards**

(State Society & Chapter Activities Competition Award)

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 5. The State Veterans Committee Chairman files a report to the State Society President by February 1. The State Veterans Committee Chairman will report all activities to the NSSAR Veterans Committee Chairman or the Executive Director at National Headquarters by February 1. **The NSSAR Veterans Committee will judge the submittals at the Spring Leadership 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 a National 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 VA Councilor equivalent positions

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- Each HOUR served in VA Volunteer Service capacity
- 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.
- 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.
- Flag/wreath placement on a Veterans Grave
- Patriot Grave Registry donation to NSSAR
- 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.

## **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)
3. Each individual is responsible for recording his personal point accumulation.
4. The chapter Veteran's Committee Chairman must verify these points.
5. 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.

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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](https://www.sar.org/Committees/Veterans/Service_to_Veterans_Medal)

## 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.

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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 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.***

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**(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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### 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](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
  - Partners in Patriotism report when completing activities with Veterans Organizations <http://www.sar.org/node/1532> Due Date: 6/15
  - Partners in Education report. Due Date: 6/10
  - Stark report <http://www.sar.org/node/338> Due Date: 2/1
  - 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: 5/15
  - Death of Compatriot <http://www.sar.org/node/258> Due Date: ASAP
  - Change of Officers <https://www.ncssar.org/wp-content/uploads/2021/03/SAR-Change-of-Officers-Reporting-Form.pdf> Due Date: Within 7 days
- Report to State SAR leadership
  - Americanism report (See NC SAR Web Site) Due date: 1/5
  - Stark Report (See NC SAR Americanism Report) Due date: 1/5
  - Reconciliation Report (Contact NC SAR Secretary) Due date: early December
  - Change of Officers <https://www.ncssar.org/wp-content/uploads/2021/03/SAR-Change-of-Officers-Reporting-Form.pdf> Due date: Within 7 days
  - Board of Managers Report (Winter and Summer) Due date: 30 days before
- Award SAR awards to community members
  - Bronze JROTC Cadet medals
  - Eagle Scout Recognition
  - Flag and Flag Retirement Certificates
  - Community Service (EMS, Fire Department, Law Enforcement, Heroism, and Lifesaving)
  - Bronze Good Citizenship Medals
  - Martha Washington (DAR)
  - SAR Medal of Appreciation (DAR)
  - Bronze SAR-C.A.R. Medal of Appreciation (C.A.R.)
- Award SAR medals to chapter members
  - Military Service or War Service <http://www.sar.org/node/78>
  - Chapter Medal of Distinguished Service
  - Chapter Meritorious Service Medal
  - Bronze Roger Sherman
  - Bronze Good Citizenship

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- Bronze Color Guard

### **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's activities conducted since last BOM Meeting
- Planned chapter meetings/events before next BOM
- Status of completion of state president's goals