

2021 Americanism Score Sheet Training Script

As many compatriots have stated, the Americanism Score Sheet can be considered one of the most important documents utilized by the SAR. It provides a roadmap for a chapter or State Society to follow for meeting the stated goals and purposes of the SAR.

The purpose of this training is to acquaint the membership with the updates and changes that have been made to make the Americanism Score Sheet more user friendly and efficient as well as close a number of data entry loopholes that allowed for double and higher counting of certain items.

While the training occurs, it is asked that all questions be asked through the CHAT feature of Zoom. Each question will be addressed after the form is fully discussed. This will also allow for duplicate questions to be eliminated. All questions will be archived and used to generate an FAQ document that will be posted on the SAR website along with a recorded version of this training session.

The training is being conducted in 4 sessions through the day. It will be comprised of a review of the form that should last between 50 and 60 minutes. This will be followed by the question & answer period where the questions submitted via CHAT will be addressed. The training will consist of reviewing the pertinent changes on each of the tabs but will not be a rote reading of all the directions and other verbiage. Where applicable, real life examples will be used for data entry examples.

The training will also include best practices and suggestions that should help in fully utilizing this form and participation in the various contests that the form gathers data for.

Overview

The Americanism Score Sheet has been used in various formats since the early 2000s to determine the winners in the annual Americanism, President General's Streamer and President General's Cup contests. Originally, the form was a Word Document that was converted to an Excel format in 2009 to allow for the form to calculate the points instead of relying on hand calculations.

Prior to 2021, the form contained a Cover Sheet, Summary Sheet and 16 separate tabs for data entry. With the 2021 version of the spread sheet, the data entry tabs have been reduced to 12 in total. Sections found on the 16-tab version are contained in the 2021 version and points have been reassigned or increased to reflect specific SAR program focuses.

The second major enhancement is that many sections have had the number of data entry lines increased to the point that all chapters should be able to capture all their activity without having to request additional lines. With respect to state societies, all but about five state societies should be able to use the form without having to request additional lines.

One minor enhancement is that the top two lines of each tab have been frozen so that those entering data can see the impact on the points earned as they scroll through each tab.

Cover Sheet

The first four lines after the title contain important information. The first line states the deadline for form submissions as 1 March of each year.

The next two lines give specific direction for data entry: first, depending on what version of Excel that is being used, you may encounter highlighted lines at the top of the form asking you to update the form, enable editing and enable content. Do not chose to update the form and then chose to enable editing and the content.

The other major direction is that in all sections where data entry is required, you must enter data into each cell in the line for the embedded formulas to calculate correctly. If a cell is left blank, the formula will not calculate any points in that line.

At the bottom of the Cover Sheet there are two sections. The first provides a calculation that reports on the eligibility of the Score Sheet to be considered for the President General's Cup. The second, at the very bottom of the Cover Sheet reports a date stamp for the version of the Cover Sheet.

Summary

The Summary Tab begins by providing a general history, information on deadlines and how calculations are done in the first two paragraphs.

The third paragraph discusses how the President General's Cup is adjudicated. While the 20% maximum for any one tab and requirement that at least 75% of available tabs must have data entry remain, a new change is the addition of requiring a minimum number of both Americanism and President General sections has been added. These minimums are that at least 5 of 8 Americanism tabs must have data entered (Americanism tabs are denoted in RED on the Cover Sheet) and at least 4 of 5 President General tabs must have data entered (President General tabs are denoted in BLUE on the Cover Sheet).

The Awards section provides a description of the 20 separate awards that can be earned. Based on a multi-year review of chapter distributions within the established competition categories, the chapter sizes have been redefined to increase the number of chapters in the higher chapter membership categories. Chapters are now divided into 1-40 members (originally 1-49 members), 41-90 members (originally 50-99 members), 91-150 members (originally 100-199 members) and 151+ members (originally 200+). There has been no change in the state society categories.

The final section includes a series of General Guidelines for utilizing the spread sheet.

Tab 1 – Media Publicity

There has been no change in the actual components on this tab but how they are structured. The structural change consists of (1) moving the Advertisement purchase section above the Traditional Publicity section and (2) expanding the Traditional Publicity section.

Items of note are as follows:

- A) the website must have an update date within the last 6-mns of the year for points to be earned
- B) the most common ad purchase in *The SAR Magazine* is a notice of regular meeting dates – this purchase has been set a half inch and can be done in all 4 issues during the year
- C) there are specific exclusions as to what constitutes allowable entries and published material across multiple sources.

Tab 2 – SAR Speakers Bureau

There are many changes to this tab besides the expansion of the two primary data entry sections. The biggest change is that points related to Color Guard activity cannot be recorded on this tab. In fact, all Color Guard activity has been removed to just two tabs instead of being recorded on seven tabs. This is the first tab impacted by that change. Please note that if a member takes credit for Period Attire on this tab, he cannot take similar credit on the Color Guard Activity Tab (Tab 8).

- A) To avoid confusion, the printed directions show how established speakers bureaus can be counted by entering 1/1/21 as the Date Established. Also, any date after 6/30 will not allow points to be earned as there is a minimum 6-month operational period requirement.
- B) This section is also used to gather data for the Ohanesian Family History Award that is beginning in 2021. This award is given to the chapter(s) that make the most school presentations during the year – please see the specific details for this contest on the SAR website. Since it is possible that the same presentation is made multiple times in a single school on a single day, directions are included stating that sufficient data must be entered under the “School/Class” column so that the distinct presentations can be seen. This most often is done through entries like “Main HS/Period 1” or “Main HS/Teacher Name”. Finally, there is a new column entitled “Period Attire”. This column recognizes that some members who are not formal Color Guard members do present in period clothing. This is where those members, and actual Color Guard members record their participation in classroom presentations. Note that at least 1 member of the group making the presentation must be in period attire for these points to be earned.
- C) This section is for all other presentations made by the Speakers Bureau. These can be to SAR, DAR or CAR chapters, other civic groups, other youth organizations or other entities. Again, the same level of detail should be entered to distinguish presentations made on the same day and the Period Attire bonus is available.

Tab 3 – Support of the C.A.R. & DAR

The primary changes are that Color Guard activity is no longer entered and both sections have been expanded.

- A) This section is only for recording leadership and monetary support of the C.A.R by SAR members. Any data entered that indicates donations to the DAR will be removed during judging. At a minimum, data entry should consist of the C.A.R. society name and data in 1 of the other 2 columns in each row. A best practice is that when recording entries related to a single C.A.R. society, all monetary donations should be aggregated to cut down on the number of lines needed. If there are multiple SAR compatriots acting as senior leaders, their names should be entered on separate lines.
- B) There are specific criteria related to the data that can be entered
 - a. Planning meetings for commemorative events are specifically excluded. That is, if the primary purpose of a meeting is to plan for a future event, it cannot be counted.
 - b. Attendance at National, District or State SAR meetings is not counted on this Tab. The intent is to increase attendance at the chapter level to build the relationships necessary for all three organizations to succeed. Thus, meetings other than chapter meetings are excluded.

Tab 4 – Youth Programs

This tab combines two tabs in previous contest forms and eliminates Color Guard activity.

- A) This section records all cash awards made with respect to established National SAR Youth or Teacher Programs. Local state or chapter programs are not allowed in this section and will be eliminated during final judging if entered.
- B) There must be at least 1 named participant in the marked contest recorded in Section 4C to earn points in this section. If this is not met, then the points will be eliminated in final judging.
- C) Awards are specifically defined in the dropdown menu provided in the “Award Presented” column. At a minimum, the “Name of Recipient” column should record the last name of the winner if privacy is a concern. If there is no personal name entered, then the points will be eliminated. A best practice is to enter the winner name and their school/organization as such “Landry (Main HS)”. This allows for planning for future award presentations by recording the schools where the SAR has established relationships and may be able to leverage the relationship into more activity such as classroom presentations or other presentations/activities. Also, note that if a Junior SAR member wins a contest award, that data is entered here and not on the Medals & Awards section (Tab 9).

Tab 5 – Public Service Programs

This tab combines two former tabs, provides expansion of data entry sections and eliminates Color Guard Activity data entry.

- A) This is the USS Stark Memorial Award carryover section that was previously its own separate tab. Note that the full number of Stark Award points are entered here. The embedded formula will calculate the allowable amount of carryover. Do not short your points by entering only 10% of the total points earned toward the Stark Award.
- B, C, D, E) No change to these sections other than expanding the data entry section.
- D) As a point of clarification, the date entered in this section should be the date that the exhibition began and not a range of dates.
- F) Definitions have been expanded to meet a broader use for this section. Note that this is where activity that is not specifically an official Historic Site & Celebration observance (Tab 6) or similar function is entered. This section includes workshops, seminars, proclamations, history fairs, military service member funerals, annual events at patriot graves etc. Also, specific definitions of participation and sponsoring are included.

Tab 6 – Historic Sites & Celebrations

Specific wording has been added to clearly define what types of events are entered in this section. Primarily it is for recording participation in the officially approved National Historic Sites & Celebrations Committee events more commonly known as “SAR National Events.” A schedule of these events is published annually by that committee on the SAR website, in at least one (1) issue of *The SAR Magazine* and quarterly in *The SAR Colorguardsman* newsletter.

This does not preclude local celebrations of specific Revolutionary War events from being entered. As stated in the directions, this local celebration must be in honor of a Revolutionary War battle or event that occurred in that area. Specifically excluded are parades, local history festivals and funerals which should be entered on Tab 5.

An example of an allowable other event would be a state event such as the recent “Heroes of the Hornet’s Nest” event in Georgia or the annual “Commemoration of the Maryland 400” held in New York City.

Credit can only be taken once regardless of the number of events participated in on national holidays such as Memorial Day, Independence Day or Veterans Day. However, if there are a series of events that occur around such a holiday over a series of days, then credit can be taken for one event on each day. For example, July 4th is on a Sunday, but various local communities have parades on the Friday, Saturday, Sunday and Monday of that extended weekend. Then the chapter or State Society can claim each specific day as long as sufficient data is entered in the “Name of Historic Event” column to properly identify & distinguish the event.

Finally, in recognition of the new ability to participate in more events through virtual or online means, the number of lines available for wreath presentations have been increased.

Tab 7 – Grave Markings

The major change besides expanding the number of data entry lines is that Color Guard activity has been removed.

Note that while data submissions to the Patriot Records Committee are encouraged at the time a grave marking takes place, if it was overlooked or was not provided in a prior year, then credit can be earned by submitting a Patriot Biography with grave data included in the current contest year being recorded in Section C.

Tab 8 – Color Guard Activity

This is an entirely new tab for the 2021 form. This is where almost all Color Guard activity is recorded. In other words, instead of entering Color Guard activity in multiple locations (especially when related to an Historic Site Observance where DAR was present), it is now just recorded once on this tab. The data entry format is the same as in prior years. Sufficient identifying detail be provided to allow the judges to be able to distinguish distinct participation at events of a similar date or type.

Note that Color Guard participation at National, District or State meetings is not recorded on this tab. Instead, it is recorded on Tab 12.

Finally, this tab has a total of 750 lines for data entry which should be sufficient for all of the various activities.

Tab 9 – Medals & Awards

While the data entry section has not been changed, this tab has had a lot of clarifying language added.

- 1) Youth Programs awards and Public Service Medals are entered on other tabs and not on this one.
- 2) Any award made by the National Society or SAR Foundation that is later re-presented at a State or District Meeting is expressly excluded. For example, the Liberty Medal and Lafayette Medal are national level awards that are presented annually at Congress or a special luncheon. Most often, the recipient is not present and receives their award at a later time. As such, these two medals are not found in the provided drop down menu.
- 3) Likewise, there are certain medals that state societies may present that may be re-presented at a chapter meeting. In this case, the state may take credit but the chapter may not.

- 4) Commemorative medals, awards, coins or state/district specific awards are also specifically excluded. The one exception is the Wounded Warrior Coin which was specifically approved by the Americanism Committee for inclusion at the request of the Veterans Committee.
- 5) Data regarding allowable awards and presenting authorities can be found in *The SAR Handbook, Volume V*.

Tab 10 – National Society Service

This tab combines two tabs from the prior scoresheet versions.

- A) Names in the dropdown menu now match the specific fund names held by the SAR Foundation. Data for this section can be obtained by contacting the SAR Foundation and requesting a report that lists fund donations by chapter and/or state. This report provides total donations made by fund and by chapter without disclosing any donor names. This report should only be requested after the end of the contest year.
- B) This section **only** requires the name of the donor and the date the required notification is filed with the SAR Foundation. The amount of the bequest is specifically NOT asked for.
- C) No changes made
- D) This is only answerable by a state society
- E) Most states will have only 4 entries in this section. To distinguish the term of each individual, the term years should be entered beside the compatriot’s name.
- F) This section has been expanded to include service on special projects such as the Patriot Research System that is currently in operation. To earn points for special projects, the data should be taken from the list of those earning the Lafayette Medal as presented at the annual Volunteer Luncheon in September.

Tab 11 – Membership

Membership is always defined as PRIMARY members of the chapter or state society. Activities of and inclusion of Dual members is expressly excluded.

- B) Data entry for this section is taken from the Cover Sheet – no further data entry is possible.
- C) This section should be for members who paid their annual dues by the stated deadline of 31 December
- D) This section records the filing of the Americanism Score Sheet for the prior year by the stated deadline within the current contest year. More clearly stated, the form that is being filed in 2021 is for activities conducted in 2020. Thus, the deadline for submission of the 2020 contest form is 1 March 2021.
- E) This is a simple yes or no response. State societies may answer yes if only one chapter has a mentor program.
- F) Note that this section is only for NEW approved members. Members who transfer in or reinstate are specifically excluded from this section. Note that a number validation has been embedded to reflect national numbers issued in the contest year.
- G) This section is where members who reinstate can be recorded. This includes members who reinstate as part of a transfer in from another state where they had previously been dropped.
- H) The required data entry includes the compatriot name, patriot name, compatriot national number and the Genealogy Department issued “ACN” number. The ACN number can be found on the Application Status Report published every two weeks on the SAR website.

Tab 12 – Meetings

This tab includes the only other area where Color Guard activity may be recorded. This Color Guard activity must meet the definition of such activity. Members who attend a meeting in period attire but are not active Color Guard participants are specifically excluded.

The type of meeting must be specified to earn the appropriate points. This is especially important for the state society that is hosting the Annual Congress because there is a specific Congress hosting limitation.

Also, there is a specific direction that while many meetings occur over multiple days, the compatriot can only take credit for attending a meeting once. For example, while a Congress can be attended up to 7 days, a compatriot can only claim one of them. A specific exception to this is that compatriots can also take credit for attending the various District Breakfasts that occur during a Congress.

Best Practices

Now that we have gone through the score sheet, let me end this portion of the training by sharing some best practices.

- 1) Data entry should be done throughout the year and preferably within a day or two of the event so that the memory or data is fresh in mind. Trying to compress all the data entry into a few days after the end of the year leads to frustration and necessarily lost information.
- 2) When considering data entry, think about the components that went into the actual event: was the DAR/CAR present, was an award presented, did a member speak, how many members attended, who attended and participated in the Color Guard, was their media coverage prior to or after the event, etc.
- 3) Provide succinct detail data entry that will allow the judge to see distinctions. This also helps the chapter and state plan for future activities by providing an archived version of an event.
- 4) Primarily for State Societies, data should be combined or aggregated where possible. Most often this is combining the number of all the members who attended an event or totaling all the donations to a particular fund/recipient into a single figure.
- 5) Do not be afraid to ask questions through the provided email. Many of these questions help the Committee refine and improve this very form.

Thank you for your attendance and attention. The questions that have been submitted through the CHAT feature have been aggregated and published in the Frequently Asked Questions document that can be found on the Americanism webpage.