



North Carolina Society

Sons of the American Revolution

Chapter Officer Training

August 2020

Foundation of the SAR = Chapter

- Honors our Patriot Ancestors with public interactions through various SAR programs and by fellowship with our Compatriots
- Local community face of the SAR
- Key to member growth and retention

Knowledgeable and consistent chapter leadership is the key to an active chapter in successfully executing the SAR mission

Chapter Officers

President

Vice President

Secretary

Treasurer

Registrar

Genealogist

Historian

Chaplain

Webmaster

Color Guard Commander

President

- Maintains general supervision over the Chapter and ensures the chapter operates within the Bylaws
- Conducts periodic, planned chapter meetings – see NC SAR Handbook Volume 2, *Chapter Leadership*
- Assigns committee members and appoints committee chairmen. Develops new committees, as needed
- Assigns Ad Hoc Committee to conduct a financial review of the Treasurer's books annually
- Calls Officer elections per Bylaws. Requests State President or Regional VP to install new officers – see NC SAR Handbook Volume 1, Chapter 7 Chapter President Protocol

President

- Ensures chapter meetings are well planned and there is an agenda for each meeting. Notifies members in advance of upcoming meetings and events.
- Directs the recruitment of new members and retention of current members.
 - Sets recruiting goals for the year
 - Notify new members of their approval and inducts them into the SAR. Ensure new members receive indoctrination training and assigned a Mentor.
 - Oversee the retention efforts of current members through surveys, interviews, and engagement
- Actively plans and oversees all chapter sponsored events ensuring compliance with NSSAR protocol.

President

- Working with the VP, rewards deserving members – see NC SAR Handbook Vol 1, Chapter 8 Medals & Awards
- Ensures the timely and accurate submission of required reports:
 - Board of Managers and Annual Convention reports
 - Reconciliation Report
 - Americanism, Flag, and USS Stark Memorial reports
- Attends 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.
- **Attends chapter meetings**

Vice President

- Presides over the chapter in the absence of the President
- Assists the President in carrying out his duties
- Assists in the planning, location selection, and agenda of chapter meetings and events
- Administers the training program for members.
 - Conducts SAR fundamentals training of new members, issues New Member Guidebook, and assigns a Mentor.
 - Conducts the training of Mentors and Chapter Officers
- Manages the Retention efforts of current members through surveys, interviews, and engagement
- Chairs the Program Committee (i.e., lines up the speaker for chapter meetings)
- Chairs of the Awards, Planning & Budget, and Membership Committees
- **Attends chapter meetings**

Secretary

- Conducts general correspondence of the chapter.
- Records, publishes and maintains a permanent copy of the chapter meeting minutes.
- Assists the President in preparing Chapter BOM and Annual Meeting reports to the State Secretary
- Maintains chapter files not the responsibility of another officer such as rosters, new members, deceased members, correspondence, and membership information
- Updates the Members Data System with member addresses, phone numbers, and email addresses
- Works with the Treasurer on the completion and submittal of the Annual Reconciliation Report
- Notifies the State Secretary of the death, resignation or removal of any member; and also change of officers
- **Attends chapter meetings**

Treasurer

- Keeps accurate account of receipts and expenditures
- Maintains a finance system that is capable of:
 - Receiving and securing income
 - Dispersing funds to pay expenses
 - Reporting on the financial status of the chapter
- Receives all chapter income including member dues
- Pays all expenses authorized by the President, per the approved budget, and/or voted on by the members
- Working with the Secretary on roster of paid members, collects/submits member dues and the Reconciliation Report to the State Secretary in December each year
- Annually by May 15, submits online the IRS 990-N form to maintain your chapter's non-profit status
- Assists with the annual financial review of records
- **Attends chapter meetings**

Registrar

- Per NC SAR Handbook Vol 5, *Registrar's Handbook*, receives/reviews new and supplemental applications for:
 - ✓ Fee is included.
 - ✓ Application form is complete and properly prepared
 - ✓ All dates are present and in the correct format
 - ✓ Applicant and sponsor has signed
 - ✓ All proof documents are present, appear authentic, and are appropriately marked-up in red ink
- Inputs data into on-line application for the applicant
- Forwards the application, proof and fee to the State Registrar
- When the Chapter has no Genealogist, performs duties of the Genealogist.
- **Attends chapter meetings**

Genealogist

- Conducts genealogical workshops
- Assists potential applicants for membership in preparing their membership applications
- Assists the Registrar in reviewing new and supplemental applications per NC SAR Handbook Vol 5, *Registrar's Handbook*, specifically:
 - Helping with a challenging family tree connection to a Patriot Ancestor
 - Finding authentic proof of generational levels
 - Referred proof is present and appears authentic
- Acts as the Registrar in his absence
- **Attends chapter meetings**

Historian

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

Chaplain

- Leads the Invocation and Benediction at Chapter meetings and events
- Sends a sympathy card to the family members of deceased Compatriots
- **Attends chapter meetings**

Webmaster

- Posts updates, news articles, pictures, and events pertaining to their chapter to their chapter homepages on the NC SAR Website or their own chapter website.
- **Attends chapter meetings**

Color Guard Commander

- Coordinates and leads local CG activities per NC SAR Handbook, Volume 4, *CG Standard Operating Procedure*
- Inspects uniforms and equipment of CG members and conducts weapons safety checks prior to events
- Maintains the Chapter's flags, stands, and other CG equipment
- Maintains a log of chapter member participation in CG activities for presentation of the Bronze CG Medal and as a back up to Americanism Report submitted annually
- Verifies \$100 RW Outfit Reimbursement for 1st time CG participants

Notional Committees

- Planning & Budget
- Awards
- Membership
- Flag
- Youth Programs (Americanism Poster & Brochure, Knights Essay, Rumbaugh Oration, American History Teacher, Eagle Scout, JROTC/ROTC)
- Veterans
- Public Service
- DAR/CAR Liaison
- Grave Marking
- Publicity/Webmaster
- Newsletter

Recommendations

- Educate chapter members on the SAR and its programs
- Get members engaged early in committee activities and delegate responsibilities/jobs
- Train and mentor your assistants
- Encourage members to acquire a RW outfit and participate in Color Guard activities/events
- Award chapter members
- Encourage a strong speakers program at chapter meetings that expands our knowledge of the Revolutionary War and Patriot Ancestors
- Conduct fundraising and donation opportunities to provide the chapter sufficient resources to execute SAR programs
- Have fun!



Questions?