



North Carolina Society

Sons of the American Revolution

State Officer Training

August 2020

State Officers

President

Senior Vice President

Regional Vice Presidents

Secretary

Treasurer

Registrar

Genealogist

Historian

Chaplain

Webmaster

Color Guard Commander & Adjutants

Trustee & Alternate Trustee

President

- Acts as the executive head of the Society and provides overall leadership in implementing the programs and setting goals that fulfill the purposes of the National Society and this Society within the State of North Carolina
- Acts in accordance with the policies and guidelines provided by the NSSAR and by the NC SAR Bylaws
- Presides at all meetings of the Society and of the Board
- Ensures that the expenditures of the Society remain within the budget of the Society – (i.e., ensures a financial review of the Treasurer's books is conducted annually by the Financial Review Committee)
- Appoints Committee Chairmen who serve at the pleasure of the President
- Forms new committees, as needed

President

- Appoints assistants to the any officer as necessary
- Establishes State-wide Recruiting & Retention Goals
- Attempts to visit each Region of the Society during his term in office, contingent upon invitation from Regional VP
- Appoints **3-5** members to the Nominating Committee and calls officer elections per the Bylaws
- Serves as Alternate Trustee
- Ensures the timely and accurate submission of required annual reports (i.e., Reconciliation Report, Americanism, Flag, USS Stark Memorial reports, IRS 990-N, etc.)
- Represents the State at Leadership Meetings, National Congress, District meetings, CAR and DAR State Conferences, and planned State events/commemorations

Senior Vice President

- Assists the President in the discharge of his duties
- In the absence of the President from any meeting, acts as the presiding officer and performs the normal functions of the President.
- Provides leadership to the Society in carrying out youth, educational, American Heritage and community affairs in accordance with the policies contained in the Society Bylaws.
- Chairs the Awards and Budget Committees
- Orchestrates the annual review and update of all volumes of the Society Handbook.

Senior Vice President

- Administers the State Training program
 - Conducts the training of newly elected State Officers
 - Ensure the State-wide training presentations and materials are reviewed and updated annually
 - Works with the Regional VPs and State Color Guard Commander to ensure training is conducted
- Leads the planning, venue selection, and agenda drafting of BOM and EXCOMM meetings, and Annual Convention
- Holds periodic meetings or teleconferences with Regional VPs to coordinate efforts, get regional updates, exchange ideas, and address areas needing attention
- Leads the effort to coordinate and update the State Calendar

Regional Vice Presidents

- Acts as the President's assistants and representatives in their respective regions
- Acts to strengthen Chapter membership and support Chapter activities
- Attempts to attend a meeting of each Chapter in his region annually
- Holds at least one joint meeting with all of the chapters in the region to conduct training/discuss any concerns
- Offers to induct new Chapter officers in the absence of the State President
- **Trains and mentors** Chapter Presidents and to those who are forming new Chapters
- Monitors dues collection by Chapters to ensure dues notices made in September and submitted to the State with the Reconciliation Report before the December deadline

Regional Vice Presidents

- Encourages Chapter Presidents to submit Chapter reports prior to each State Society meeting
- Ensures that all Chapters in his region have made the required IRS tax filing each year prior to May 15th
- Encourages attendance of Chapter members to SAR sponsored events, such as Board meetings, Annual State Meetings and National Congresses, and lead by example
- Recommends and encourage promising Chapter leaders to run for State Office
- As a member of the Awards Committee, recommends regional Compatriots for Society Awards and be a conduit through whom Chapters may forward recommendations to Awards Committee Chairman

Secretary

- Keeps the minutes and records of the Society and conducts its correspondence
- Distributes copies of the minutes of each meeting of the Society and its Board to each officer, past State president, and current chapter president within 30 days of that meeting
- Works with the Treasurer in the completion and submittal of the Annual Reconciliation Report to National. Once completed, provides Membership Cards for the current year for each Chapter to the Chapter President for distribution to the Chapter's members.
- Provides the National Registrar with updates on Society membership including notification of the death, resignation or removal of any member
- Notifies each member of the Society of the list of nominees for election at least one week before the Annual Meeting

Secretary

- Notifies National SAR of the change of **State and Chapter** officers
- Communicates to the National Secretary General at least thirty (30) days prior to the National Congress, the names of the nominees for Trustee and Alternate Trustee
- Communicates to the Executive Director at least 30 days prior to National Congress, the list of elected Delegates representing Society at National Congress
- Working with the Bylaws Committee Chairman, provides a copy of the language for proposed Bylaws changes to the membership for review and approval at the Annual Convention no later than 10 days before the convention
- Provides copies of the Sarbanes-Oxley Act Compliance forms to demonstrate proper governance of our not-for-profit organization under this law

Secretary

- Requests for funding from the State Society for projects or new activities are handled through the Financial Proposal Notification Policy (FPNP), which are submitted to State Secretary. Provide Funding request to BOM Meeting attendees at least 2 weeks prior to the meeting for review/discussion at that meeting; and ensures they are added to the agenda.
- Processes new member, supplemental, memorial, and life membership certificate packages. Forwards the packages to Chapter Registrars for updating records, and forwarding the Chapter President for presentation to Chapter members.
- Upon the death of a member, process a Memorial certificate package and send to member's family

Treasurer

- Collects fees, dues and other income payable to the Society
- Maintains accounts in the name of the Society in a bank or banks approved by the Board
- Deposits and disburses funds to and from those accounts as necessary. Withdrawals should be made by check except in unusual circumstances and only for disbursements supported by vouchers or other evidence of financial obligations of Society
- Keeps an account of the receipts and disbursements to and from the Society accounts
- Send donation letters to members who donate money to the one of the State fundraising programs

Treasurer

- At each Annual Meeting and Board meeting, renders an accounting of the funds in his charge
- Provides such financial information relative to Society as officers may from time to time require
- 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 State's non-profit status
- Provides oversight of chapters' timely online submittal of the IRS 990-N form to maintain their chapter's non-profit status
- Assists with the annual financial review of records

Registrar

- Investigates the proofs of eligibility of all applicants for membership, requiring further proof as necessary. When satisfied that the proofs support the eligibility of the applicant, approve and transmit applications and fees to the National Society for approval.
- **Has custody of all genealogical records of the Society**
- Presents to the members at each Annual Meeting a list of applications submitted and accepted by the National Registrar General for the year

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 referred proof is present and appears authentic
- Serves as liaison with National Registrar to ensure that all questions are answered
- Conducts annual review of NC SAR Handbook Vol 5, *Registrar's Handbook*, and forwards changes to Senior VP for incorporation

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
 - Ensuring referred proof is present and appears authentic
- Acts as the Registrar in his absence

Historian

- Collects and maintains the files of the Society regarding such historical data as may be brought to the attention of the Society concerning battles, incidents and soldiers and other patriots of the American Revolution, particularly as they relate to North Carolina.
- Maintains records on the major activities of the Society

Chaplain

- Should be an ordained clergyman
- Opens and closes Annual and Board meetings with such prayers and devotional guidance as is proper for such occasions
- At the Annual meeting, conducts a remembrance observance in memory of members of the Society who have passed on since the last Annual Meeting
- Upon notification of the death of NC Compatriot, sends a sympathy card from the NC Society to the family members

Webmaster

- Is responsible for the organization, management, presentation and format of all materials that appear on the Society website
- Edits and publishes all materials submitted by other State officers and State committees before those materials are placed on the website
- Supplies the user name and password to the chapter webmaster/chapter president
- Posts new officers or updates officer information when authorized by the State Secretary
- Manages the Hosting technical responsibilities of the website on WPEngine.com
- Manages the technical Domain Names and DNS on GoDaddy (ncssar.com, ncssar.org, ncssar.net)
- Manages the updates to WordPress and associated Plugins for the website

Color Guard Commander & Adjutants

- Coordinates in-state National CG activities with the National CG Commander and leads all State CG activities per NC SAR Handbook, Volume 4, *CG Standard Operating Procedure*
- Inspects uniforms & equipment of CG members, conducts weapons safety checks prior to events
- Maintains State's flags, stands, and support equipment and provides input into the Budget
- Maintains a log of State member participation in CG activity for presentation of the Silver CG Medal and Von Steuben CG Medal and as a back up to Americanism Report submitted annually
- Presents CG Medal if requested by the chapter CG commander
- Responsible for the training of CG including black powder firearms

Trustee & Alternate Trustee

- Acts as the legal custodians of all National Society property, both real and personal and who manage the business and the affairs of the National Society
- Nominated by the State, then elected and sworn in at National Congress
- Participates in Trustee Meetings at Spring & Fall Leadership Meetings, Special Meetings, and National Congress
- Alternate Trustee, typically the State President, serves in the absence of the Trustee. Must be sworn in to participate.

Recommendations

- Read and become familiar with the NSSAR and NC SAR Handbooks and NC SAR Bylaws
- Continuously educate members on the SAR mission and its program
- Seek out Chapter members and encourage them to become State Officers and State Committee members
- Train your relief or assistant
- Keep the NC SAR Website and NC SAR Handbooks relevant, accurate, and current
- Have fun!



Questions?

Key Committees – Chapter 4

- Annual Meeting
- Americanism and Flag
- Awards
- Bylaws
- CAR Liaison
- Development (Fundraising)
- Education
- Executive
- Finance and Budget
- Financial Review
- George Washington Endowment Fund
- Membership
- Nominating
- Patriot Outreach
- Patriot Records
- Publicity/Newsletter

Key Committees

- Youth and Educators
 - Americanism Elementary School Poster Contest
 - Sergeant Moses Adams Middle School Brochure Contest
 - Eagle Scout Recognition Program
 - Arthur M. and Berdena King Eagle Scout Contest
 - George and Stella Knight Essay Contest
 - Joseph S. Rumbaugh Oration Contest
 - Reserve Officer Training Corps (ROTC) and Junior ROTC Awards Program
 - Enhanced Junior ROTC Cadet Recognition Program
 - Dr. Tom and Betty Lawrence American History Teacher Award (High School, Middle School, and Elementary School)
- Veterans*
- Public Service*
- Investment*
- DAR Liaison*

* Not listed in Chapter 4