



OFFICIAL BYLAWS
AND
HANDBOOK

North Carolina Society
of the
Sons of the American Revolution
Volume 1

2026
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North Carolina Society SAR Handbook

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**Official Bylaws and Policies
of the
North Carolina Society**

April 5, 2025

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Bylaws

Article I. Name

The name of this organization is the North Carolina Society of the Sons of the American Revolution (the Society). It is a subordinate organization of the National Society of the Sons of the American Revolution (the National Society).

Article II. Objects

The Society adopts, endorses and supports the objects of the National Society.

Article III. Membership

§ 1. Eligibility. Any member of any class in good standing of the National Society is eligible to become a member of the same class in this Society. A member is in good standing if he is not in arrears in payment of dues, and not disqualified by disciplinary action.

§ 2. Methods for Securing Membership. There are four methods for securing membership in the National Society and this Society.

a. Original application. New applicants for membership in the National Society and this Society may apply on forms prescribed by the National Society and supplied by this Society. Such applications must have the endorsements of at least two members of the Society.

b. Reinstatement. A former member of the Society may request reinstatement in writing.

c. Transfer. A member in good standing of another State Society may surrender that membership and become a member of this society and demitted from his original State Society by application on a form prescribed by the National Society accompanied by a copy of the application for membership originally submitted to the National Society. A member of the Children of the American Revolution or the Children of the Revolution upon attainment of the age of 18 may apply for membership in this Society by furnishing a copy of his original application for membership and evidence of good standing in that other State Society and pay dues.

d. Dual Membership. A member in good standing of another State Society may become a member of this Society, while retaining membership in that other State Society by application on a form prescribed by the National Society accompanied by a copy of his original application for membership to the National Society and evidence of good standing in that other State Society.

§ 3. Acceptance of Membership Applications. Upon receipt of an application described in § 2 above accompanied by the appropriate fee, the Registrar will certify and submit the application to the National Society Registrar General. An applicant is not a member until the Registrar General notifies the Society Secretary of his approval of the application and of the national and state numbers assigned to the new member. At that time, the applicant becomes a member of both the National Society and the Society, with his membership as of the date of approval of his application by the Registrar General. The Registrar will notify an applicant whose application is not approved.

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§ 4. Termination of Membership. Membership in the Society may be terminated by or for:

a. Resignation. A member may resign from the Society for any reason, including demission to become a member of another State Society, upon written request to the Secretary

b. Lapse. Membership in the Society will be considered lapsed and automatically terminated if the dues of the member in question remain unpaid on December 31st.

c. Cause. Membership in the Society may be terminated by disciplinary action as provided for in Article XVI.

§ 5. Half-Century Membership. A Society member who is a National Society Emeritus Member is a Half-Century member. Half-Century members are exempt from payment of Society dues.

§ 6. Life Membership. A member may enroll in the Thomas N. “Nat” Clark Life Membership Plan, under which the member pays a fixed, one-time sum and is subsequently exempt from payment of further Society dues. Chapter 3 of this Handbook provides details.

§ 7. Junior Member. A member who has not reached the age of 18 is a junior member.

Article IV. Supplemental Ancestor Certificates

A member or an applicant for membership may have more than one ancestor whose service or contribution qualifies the member or applicant for membership in the National Society and this Society. In this case, the applicant or member may file an application for a Supplemental Ancestor Certificate naming the second or further qualifying ancestor or ancestors. Each qualifying ancestor for which a certificate is desired requires a separate application. The procedure for filing a “supplemental” application is the same as that for filing an original membership application except that the signatures of two present Society members are not required.

Article V. Fees and Dues

Members of the Society are responsible for payment of applicable fees and dues prescribed by the National Society in the National Society Handbook. Members of the Society are also responsible for payment of membership application fees, Supplemental Ancestor Certificate application fees, reinstatement fees and annual dues assessed by the Society as well as fees and dues that may be assessed by the Chapter to which they belong. All chapters will collect National Society and Society dues for a given year from their members and prepare a chapter Reconciliation Report. All chapters will forward their chapters’ National Society and Society dues, a Reconciliation Report and a current chapter membership roster to the Society Secretary in December. Applicable fees are payable at the time an application is submitted. The Board may recommend the amount of the fees and dues to the Society at the Annual Meeting for approval by the Society. Fees and dues amounts and exceptions for special circumstances are listed on the Fees and Dues Chart posted on the NC SAR Website and distributed to Chapters as required.

Article VI. Officers, Delegates and Trustees

§ 1. Officers. The officers of the Society are President, Senior Vice President, five Regional Vice Presidents, Secretary, Treasurer, Registrar, Historian, Chaplain, Genealogist, Webmaster, Chancellor, and Surgeon. The officers serve for a term of one year or until their successors are elected and qualified. The officers serve without compensation.

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§ 2. Delegates. The Society will send Delegates and Alternate Delegates to the annual Congress of the National Society. The number of such will be as prescribed by the rules of the National Society.

§ 3. Trustees. The Society will also nominate a Trustee and an Alternate Trustee to be elected by the National Society.

§ 4. Nomination. The President will appoint five members to a nominating committee. This committee will prepare a list of nominees for the officers and delegates of the Society and forward it to the Secretary. The committee will certify that each nominee has indicated that he is willing to serve in the office for which he has been nominated. The Secretary will notify each member of the Society of the list of nominees at least one week before the Annual Meeting. Member attendees at the Annual Meeting may offer additional nominees from the floor. Such nominees will also indicate their willingness to serve.

§ 5. Election. Members in good standing in attendance at the Annual Meeting will elect the officers and delegates by a secret ballot in a contested election. Election requires a majority of votes cast. Absentee and proxy votes are not allowed.

§ 6. Procedure for an Uncontested Election When Exigent Circumstances Prevent or Render Inadvisable Regular Voting. If, after the close of nominations, there are no contests for any officer or delegate position, the sitting President will declare the nominees elected by acclamation.

§ 7. Procedure for a Contested Election When Exigent Circumstances Prevent or Render Inadvisable Regular Voting. If, after the close of nominations, there is more than one candidate for any officer or delegate position, an election for that/those positions(s) will be held using the following procedure:

a. The nominating committee will designate two of its members to function as tabulators and inform the Secretary of those so designated.

b. The Secretary will (i) provide a list of the email addresses of members to each of the tabulators and (ii) send an email message to all members announcing the contested position(s), the candidates for that/those position(s), the names and email addresses of the tabulators and a date and time, at least one week later, at which the tabulators must receive email ballots.

c. Upon receipt of the Secretary's message, members will indicate their choice for each contested position in a message addressed to the two tabulators and transmitted on or before the date and time specified in the Secretary's message.

d. After passage of the specified date and time, the tabulators will tally the ballots received to determine the electee(s). The tabulators may rely on the presumption that the ballot received from an email address listed in the list of members' addresses was sent by the member listed.

e. The tabulators will (i) compare their respective vote tallies, (ii) resolve any discrepancy and (iii) report the election result(s) to the Secretary. The tabulators will not divulge how any member voted to anyone except each other.

f. The Secretary, upon receipt of the result(s), will promulgate it/them to all members by email.

A similar procedure will be used for voting on other matters by the membership when a regular vote is not possible or is inadvisable.

§ 8. Assistants to Officers. The President may appoint an Assistant to aid society officer in the performance of his duties. Such an Assistant is not a society officer.

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Article VII. Committees

§ 1. Standing Committees. There are a number of standing committees that are constituted to accomplish the objects of the Society. Chapter 4 of this Handbook lists the standing committees, their functions and responsibilities. The President appoints the chairmen of the various committees, and they serve at his pleasure.

§ 2. Ad hoc Committees. The President may, from time to time, establish ad hoc committees to deal with exigent or temporary situations or circumstances. The composition and duties of such a committee will be as necessary to the situation.

Article VIII. Board of Managers

§ 1. Composition. The Board of Managers (the Board) of the Society comprises the officers, the National Trustee, Chapter Presidents, Past State Presidents, the Past National Trustees and Society Committee Chairmen and Officer Assistants, if any.

§ 2. Authority. The Board is the governing body of the Society. At times other than the Annual Meeting, the Board may fill vacant officer positions for the remainder of unexpired terms. The members of the Board may suspend for cause any officer of the Society.

§ 3. Quorum and Voting. The presence of 20 percent of the Board at a meeting of the Board constitutes a quorum. No substantive business may be conducted in the absence of a quorum. Each member of the Board has one vote. A Chapter President may designate a member of his chapter to attend a Board meeting in the President's absence and cast a vote for the chapter. A State Committee Chairman may designate a member of his committee to attend a Board meeting in the Chairman's absence and cast a vote for the committee. Such members must register with the Secretary before casting a vote.

§ 4. Executive Committee.

a. Composition. The Executive Committee of the Board (ExCom) comprises the President, Senior Vice President, Secretary and two at-large members appointed by the President.

b. Authority. The ExCom has the following powers and duties:

(1) to manage affairs of the Society that cannot await the next regular meeting of the Board;

(2) to authorize transfers of line items in the various budgets of the Society providing that a transfer is within the same program or functional category, the amount involved does not exceed 25 percent of the amount approved by the Board for any line item and there will be no increase in the total spending in the program or functional category. The Board must approve a change of more than 25 percent of the budget allocation for a given line item. This Board approval requires a majority vote at a regular or special meeting or by a vote conducted through electronic mail;

(3) to sign contracts for the procurement of goods and services the purchase of which the Board has previously approved, the ExCom will designate which categories of expenditures each of its members will have the authority to sign. In addition to the designated ExCom Member, the Treasurer must also sign or approve such contracts. By the Treasurer's signature or approval, he certifies that there is an appropriate budget line item to which to charge the expenditure and that there are adequate funds in that line item to cover the expenditure and

(4) to ensure that rules and procedures of the Society are in compliance with the rules and procedures of the National Society.

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c. Board approval of ExCom Actions. The Board must approve an action taken by the ExCom by a majority vote at the next meeting of the Board after that action is taken.

§ 5. Council of Past State Presidents.

a. Composition. The Council of Past State Presidents (the Council) comprises of all Past State Presidents who are active members of the Society. One Council member, elected by members of the Council, will serve as chairman for a term of two years.

b. Authority. The Council advises the president. The president may refer such matters as he deems appropriate to the Council for its advice.

Article IX. Society Meetings

§ 1. Annual Meeting. The general membership will meet at an Annual Meeting on a Saturday in March or April. Members present will elect Society officers for the coming year and transact such other business that may come before them.

§ 2. Special Meetings. The President, the Board by a majority vote, or 25 members of the Society from at least five chapters by written petition, may call a special meeting of the Society. A special meeting will be held at such place, date, and hour as the member or members calling the meeting may designate. No business other than that specified in the notice of the meeting may be conducted at a special meeting.

§ 3. Notice. The Secretary will normally notify members of the date, hour, and place of the Annual Meeting no fewer than ten days before the scheduled date of that meeting. In the case of a special meeting, the secretary will give notice of the date, hour, place and purpose(s) of the meeting at least ten days and not more than 20 days before the scheduled date of the meeting. The notice of a special Society meeting will contain information about the business to be conducted at that meeting.

§ 4. Quorum and Voting.

a. The presence of members in good standing of at least 50 percent of the chapters shall constitute a quorum. No substantive business may be conducted absent the presence of a quorum. When there is a quorum present, an act of a majority of the members present is the act of the Society, except where another provision of these bylaws prescribes a greater majority.

b. Each member who is present and is in good standing, as prescribed in art. III § 1, has one vote upon each matter submitted to a vote at any Society meeting. Absentee and proxy voting are not permitted.

c. Voting to elect the officers of the Society or to decide any other matter that the Board considers to warrant such a procedure will be by secret, written ballot. Voting on other matters brought before the membership will be by voice vote or show of hands.

d. Art. VI contains procedures for election of officers and other board members.

Article X. Budget

§ 1. Preparation. No later than five months before the Society Annual Meeting, the Finance Committee will solicit inputs from the Society officers and committee chairmen regarding expected income and expenditures during the coming fiscal year. Based on these inputs, the Finance Committee will prepare a proposed budget

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for the Society general operating fund and for each of its special funds. The proposed budgets must balance anticipated income and expenditures.

§ 2. Presentation and Approval. The Finance Committee will present its proposed budgets to the Board at the Board meeting that immediately precedes the Annual Meeting. The Board will consider the proposed budgets and vote on whether to recommend them to the membership at the Annual Meeting. If the Board approves the proposed budgets, they will be presented for a vote of adoption by the membership at the Annual Meeting. If exigent circumstances prevent or render inadvisable a regular vote on the budget, a procedure similar to that contained in Art. VI § 6 or § 7 will be used to obtain membership approval of the budget.

§ 3. Amendments and Oversight. The Board, normally on recommendation of the Finance Committee, may authorize amendments to any of the current budgets. The Finance Committee will oversee the management of the Society financial operations and make recommendations for changes to the Board.

§ 4. Off-Budget Expenditures. The Board must approve any proposed expenditure not in the current budget. A member proposing such an expenditure must notify the Secretary of that proposal at least 17 days before the meeting at which the Board will consider it. The Secretary will notify the Board no later than ten days before that meeting.

Article XI. Financial Review

A review committee of at least two members appointed by the President will review the financial records of the Society annually as soon as practicable after the end of the fiscal year. The committee will report its findings to the Board at the first Board meeting after the completion of the review.

Article XII. Chapters

§ 1. Formation. Ten or more members of the Society may form themselves into a chapter. Upon receiving a petition containing the location, proposed name and names of the petitioners, the Board may grant a charter to the proposed chapter and authorize the adoption of bylaws consistent with those of the Society. The secretary of the newly formed chapter will file a copy of its bylaws, a list of the chapter officers and a membership list with the Secretary.

§ 2. Dual Chapter Memberships. A member may be a member of more than one chapter of the Society in accordance with the procedures established by the chapters involved. A member of more than one chapter may not hold an office or critical committee membership in more than one chapter at the same time. Critical committees include finance, nominating, awards and such other positions that the Society may designate.

§ 3. Dues. A chapter may levy and collect dues from its members.

§ 4. Chapters shall be required to participate in, by sending a voting member, to represent their Chapter at called meetings of their Region VP and at least one (1) of the three (3) State meetings during a calendar year. These three meetings are defined as the two Board of Managers meetings and the Annual meeting.

§ 5. Each chapter will sponsor/co-sponsor at least one event/activity contained in the Americanism Report during a calendar year. The ROTC/JROTC Recognition Program medals awarded each spring will satisfy this requirement only if awarded in person.

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§ 6. Chapters shall submit the required Board of Managers meetings (2) and Annual Meeting (year-end) reports to the State Society by the deadlines set forth by the State Society. The required information for these reports is indicated on the North Carolina Society website. Chapters will notify the State Secretary of the election/appointment of chapter officers no later than 30 days after said election/appointment. Notifications shall be in writing and include the name of the officer, date of election/appointment. If a report is not submitted on time, the Region VP will contact an officer of the Chapter via telephone to secure their Chapter's report. Reports from the Board of Managers Meeting, including late reports, will be posted on the State website.

§ 7. If a chapter fails to reach the above stated goals the Executive Committee may recommend it be placed on probation for a period of one (1) calendar year. Said chapters will be under the direct supervision of the Officer for Chapter Revitalization. This State Officer will oversee and evaluate the Chapter's performance and implement corrective action. Chapters who are placed on probation for two (2) of three (3) consecutive years shall appear before the first Board of Managers meeting of the fourth (4th) calendar year to justify why their charter should not be revoked. The said charter may be subject to revocation by a two-thirds vote of the Board of Managers.

§ 8. Revocation of Charter. The Board may revoke the charter of a chapter for cause by a two thirds vote.

§ 9. Dissolution. A chapter may dissolve upon the two thirds vote of its members.

§ 10. Action Upon Charter Revocation or Dissolution. When the charter of a chapter is revoked or the chapter dissolved, a former member of the now-defunct chapter will transfer all of its property and assets to the Society. The Society will hold the chapter property and assets for three years. If the chapter is not reestablished after the passage of that time, its property and assets will revert to the Society.

Article XIII. Ladies' Auxiliary

§ 1. Establishment and Purpose. The Society supports the formation of a ladies' auxiliary. The auxiliary provides assistance to the Society to further the objectives and purposes of the National Society and the Society.

§ 2. Membership. Membership in a ladies' auxiliary is open to women who are related by marriage or blood to members of the National Society.

§ 3. Organization and Operation. A ladies' auxiliary will have its own bylaws and bear its own costs.

Article XIV. Parliamentary Authority

The rules contained in the current edition of *Robert's Rules of Order* will govern proceedings of the Society in all cases where those rules are applicable and in which they are not inconsistent with these bylaws and any other special rules of order that the Society may adopt.

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Article XV. Code of Conduct

§ 1. Establishment. The Society will maintain a **Code of Conduct Policy** that is consistent with the Code of Business Ethics and Conduct, the Conflict of Interest and Code of Organizational Conduct Policy, and other relevant policies of the National Society, which will apply to all members. Modifications to the Policy will be approved by a two-thirds (2/3) vote of the Board of Managers.

§ 2. Compliance. Members of the ExCom Board and the Finance, Financial Review, Investment, and George Washington Endowment Foundation committees will execute a statement of agreement to comply with the Code of Conduct Policy annually.

Article XVI. Discipline

§1. Establishment. The Society will maintain a **Discipline, Procedure, and Due Process Policy** that is consistent with relevant policies of the National Society. Modifications to the Policy will be approved by a two-thirds (2/3) vote of the Board of Managers.

§2. Ethical Standards. A Compatriot may be charged for: (1) violating the NCSSAR Code of Conduct Policy; or (2) for rendering himself unworthy of membership by engaging in felonious conduct, misdemeanor conduct involving moral turpitude, or conduct disloyal to the ideals or prejudicial to the interests of the Sons of the American Revolution.

§3. Reporting Compatriot Violations of Ethical Standards.

a. Compatriots with information regarding the conduct of another, that may support the proffering of charges pursuant to §2 above, should provide such information to the NCSSAR President. The report of information must: (1) be submitted in writing; (2) be signed and dated by the Compatriot providing the information and (3) contain an affirmative statement that the facts presented are true, accurate, and complete to the knowledge of the Compatriot, and (4) contain signed statements of the asserted facts from knowledgeable individuals if the Compatriot did not possess personal knowledge of the asserted facts. If a complaint alleges a violation by the NCSSAR President, the written complaint shall be submitted to the NCSSAR Senior Vice-President in lieu of the NCSSAR President, in which case all actions required by the NCSSAR President set forth below shall be performed by the NCSSAR Senior Vice-President.

b. A Compatriot shall not bring a complaint, or assert allegations against or by another Compatriot, unless such complaint, and/or allegations are well grounded in fact and warranted by NCSSAR's governing instruments. The filing of a frivolous and groundless complaint may constitute a violation and make the filing party subject to an ethics complaint.

§ 4. President. It is the responsibility of the NCSSAR President to ensure that any complaints are properly handled and referred as provided for in this Bylaw and the NCSSAR Discipline, Procedure, and Due Process Policy. The State President may, upon due consideration of a written report or complaint that in the President's judgment does not constitute a possible violation of any provision set forth in §2 of this Bylaw, dismiss the report or complaint, and notify the complainant of the decision. Otherwise, he may act as follows:

a. Appoint an investigator to investigate the facts of the report or complaint;

b. Acting within the limits of his powers as NCSSAR President, resolve the matter without the

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necessity of any further action;

c. The President may appoint a State Ethics Committee to investigate and recommend a sanction, if appropriate. If the State Ethics Committee recommends a sanction, the State President must transmit that recommendation to the Board of Managers.

§ 5. State Ethics Committee. The State Ethics Committee will be appointed and operate in the manner prescribed by the Discipline, Procedure, and Due Process Policy. They will report their findings to the President.

§ 6. Board of Managers. Whenever a report or complaint results in a recommendation for a sanction from the State Ethics Committee, the Board of Managers must review and approve that recommendation. The authority to impose a sanction for an ethics violation rests entirely with the Board of Managers, except where otherwise provided. When the NCSSAR President transmits the recommendation for a sanction from the State Ethics Committee, the Board of Managers must review the entire record including:

- (a) the report or complaint and the response by the subject as well as any other written statements of the parties,
- (b) the investigation report,
- (c) the recording of the hearing conducted by the State Ethics Committee and
- (d) the report and recommendation of the State Ethics Committee.

The review of a recommendation from the State Ethics Committee will be taken up by the Board of Managers in a closed meeting where only the members of the Board of Managers, the members of the State Ethics Committee, the subject and his attorney or advocate (if applicable), and any other investigators or personnel who participated in the State Ethics Committee hearing are present. The proceeding before the Board of Managers is a review only and is not another hearing with testimony and argument. However, the Board of Managers may ask questions to clarify any issues raised in the hearing.

- a. The Board of Managers may accept, reject, or modify in whole or in part, the sanctions recommended by the State Ethics Committee. The Board of Managers may also impose a different sanction if they feel it is appropriate. Except as otherwise set forth below, the vote to sanction a compatriot based on an ethics violation must be by a majority vote of the Board of Managers present and voting. When the Board of Managers votes to impose a sanction for an ethics violation, they must notify the subject within 10 days of the vote of the sanction.
- b. The Compatriot may have waived his right to a hearing and accepted a sanction offered by the State Ethics Committee. This must be approved by a two-thirds (2/3) vote of the Board of Managers present and voting.
- c. If the Board of Managers votes to expel the Compatriot from the NCSSAR, that expulsion requires a two-thirds (2/3) vote of the members of the Board of Managers present and voting. The Executive Committee of the National Society must review each expulsion from a state society. Upon a vote by the Board of Managers to expel a compatriot, the NCSSAR Secretary will transmit a copy of the minutes of the Board of Managers meeting where the expulsion occurred as well as a copy of the NCSSAR Bylaws and Policies where the discipline rules for member discipline are found. Additionally, the NCSSAR President

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must state the factual basis of the expulsion and certify that the action by the NCSSAR was in accordance with those NCSSAR rules.

d. In the event the Board of Managers votes to expel the subject, the expulsion will be effective upon the expiration of the time in which the subject can appeal that determination. If the subject should appeal his expulsion, he shall automatically be considered as suspended from all NCSSAR meetings and activities pending the outcome of his appeal.

e. If the sanction involves probation those terms shall be set by the Board of Managers, including, but not limited to, length of probation, constructive or rehabilitative steps and reinstatement conditions. At the conclusion of the probationary period, the Board of Managers may reconvene to determine whether the probation should be rescinded, or if additional corrective action is necessary, or if the member should be expelled. A member who fails to comply with the probation terms may be expelled subject to the provisions of this Bylaw. Unless additional action is taken by the Board of Managers the probation will expire as per the conditions originally set.

f. If the sanction involves a suspension or prohibition of participation in NCSSAR activities, the Board of Managers may reconvene to determine whether the suspension should be rescinded, extended, or modified, or if additional sanctions should be imposed. Unless additional action is taken by the Board of Managers, the suspension will expire as per the conditions originally set.

g. If the sanction is to suspend or expel the subject, NCSSAR may rightfully report that the subject is not in good standing if asked by another state society.

§ 7. Appeal. An expulsion imposed by the Board of Managers shall be final, provided that a Compatriot may appeal his expulsion to the next Annual Meeting of the NCSSAR by written notice to the President within ten (10) days of the date he receives his notice of the sanction imposed by the Board of Managers. The hearing would be held at the next Annual Meeting and will be presided over by the State President or his designee. Such appeal before the Annual Meeting will follow the format outlined in Section 6 of this Bylaw. Expulsion from the NCSSAR requires the affirmation by a two-thirds (2/3) vote of the delegates present and voting at the Annual Meeting. The only matter that can be appealed from the Board of Managers to the members of the NCSSAR at the next Annual Meeting is the expulsion of the subject.

§ 8. Temporary Suspension of Officer. Any Elected Officer, Appointed Officer or Director may be removed through the disciplinary proceedings as provided for in this Bylaw. Notwithstanding the foregoing, an Officer or Director may be suspended from office pending an investigation and/or hearing. During this temporary suspension, the President shall appoint another member to fulfill the duties of the suspended officer. An Officer or Director may be suspended from office if: 1) an extended absence is continuous and detrimental to the interests of NCSSAR, or 2) substantial evidence is found that the subject has damaged, destroyed, converted, neglected, misappropriated, embezzled or stolen NCSSAR property, real or personal, or NCSSAR funds, or 3) has engaged in conduct or activity that brings discredit to the Sons of the American Revolution. The Board of Managers has the authority to temporarily suspend an Officer or Director and may do so by majority vote.

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§ 9. Roberts Rules of Order. The provisions regarding disciplinary procedures contained in the most recent edition of *Robert's Rules of Order* as such as may be applied by the procedures set forth in this Bylaw, shall govern the investigation and hearing of any charges brought pursuant to §2 of this bylaw.

§ 10. Notices. All time periods for notices and for actions to occur, where stated, are intended to encourage the timely processing of ethics complaints. Since most hearings will have to occur during state meetings where all necessary participants are present the timeline of the investigation and hearings should be scheduled for the convenience of the participants.

Article XVII. Dissolution

The Society may be dissolved at any time by written consent of not less than three quarters of the members who are in good standing, as prescribed in Art. III § 7. Upon the dissolution of the Society, other than for purposes of reorganization, whether voluntary, involuntary or by operation of law, none of the property of the Society nor any proceeds from the sale of such property nor any other assets of the Society will be distributed to any members of the Society or any other individual or entity but, after payment of the debts of the Society, its property and assets will be transferred to the National Society.

Article XVIII. Amendments

These bylaws may be amended by the vote of two-thirds (2/3) of the members present at a meeting of the Society providing that the Secretary has sent notice of the proposed amendment to all members at least one week before such meeting. If exigent circumstances prevent or render inadvisable a regular vote to amend, a procedure similar to that contained in Art. VI §6 or §7 will be used to approve bylaw amendments.

Article XIX. Miscellaneous

§ 1. Fiscal and Membership Years. The Society's fiscal year is from 1 May to 30 April. The Society's membership year is from 1 January to 31 December.

§ 2. Means of Effecting Notice. Notices prescribed in these Bylaws, including notices of regular and special Society and Board meetings, dues notices, meeting minutes and the like, may be communicated via email messages or USPS First Class Mail, unless otherwise specified in these Bylaws or by Policy.

§ 3. Meetings of the Board and ExCom via Telephonic or Audio/video Conferencing. The Board and the ExCom may hold meetings by means of telephonic or audio/video conferences. The rules and procedures for meetings held in person apply to meeting held by electronic means.

Article XX. Liability and Indemnification

§ 1. Liability. The Society will maintain general liability insurance to protect itself, its officers and the officers of its chapters against any liability asserted against it or any of its officers or chapter officers who were acting reasonably in furtherance of the mission and goals of the society.

§ 2. Indemnification. No officer of the Society will be liable for an act or failure to act in the performance of his duties if he does so good faith and with reasonable care. Absent fraud or bad

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faith, no officer of the Society will be personally liable for the debts, obligations or liabilities of the Society. The Society will indemnify an officer of the society for the reasonable expenses he incurs in any threatened, pending or completed legal proceeding that seeks to hold him liable because he was acting as an officer of the Society. The Society will indemnify an officer of the Society for reasonable payments he may be required to make in satisfaction of any judgment, fine, penalty or settlement for which he became liable. The Society will maintain directors and officers (D&O) insurance at its expense.

Changes to Bylaws

22 April 2017 -- changed the term from District to Region to describe the geographical areas of the North Carolina Society

22 April 2017 -- removed references to fees in the bylaws

7 April 2018 -- Deleted the phrase "and return his application fee." From the last sentence of Article II, Paragraph 3

5 April 2025 -- Article III, §1, added "and not disqualified by disciplinary action"

5 April 2025 -- Article III, §4, c, Discipline is now in Article XVI

5 April 2025 -- Article VI, §1, added Chancellor and Surgeon

5 April 2025 -- Article VI, §5, removed "provided that there is a quorum" (Quorum required for entire meeting)

5 April 2025 -- Article VIII, §3, removed "A vote to suspend an officer must be by secret ballot and by a two thirds majority of the members present." (defined elsewhere)

5 April 2025 -- Article IX, §4, Quorum defined as members in good standing of at least 50 percent of chapters

5 April 2025 -- The subjects of Articles XV and XVI are reversed (Code of Conduct now before Discipline)

5 April 2025 -- Article XV, renamed "Code of Conduct"

5 April 2025 -- Article XV, §1, Policy renamed "Code of Conduct," added "other relevant policies of the National Society," clarified that it applied to all members, added Policy approved by 2/3 vote of Board of Managers

5 April 2025 -- Article XVI, completely rewritten to conform to current National Society policies, defines Discipline, Procedure, and Due Process Policy approved by 2/3 vote of the Board of Managers

5 April 2025 -- Article XVII, clarified to "two-thirds (2/3)"

5 April 2025 -- Article XIX, §2, rewritten to unambiguously allow email or US Mail for notices

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Policies

North Carolina SAR Code of Conduct Policy

I. Code of Business Ethics and Conduct Policy

Section 1. General. National Society, Sons of the American Revolution (hereafter, NSSAR) is a not-for-profit corporation chartered by an Act of the United States Congress on June 9, 1906. The purposes and objects of NSSAR are declared to be patriotic, historical, and educational, and shall include those intended or designed to perpetuate the memory of the men who, by their services or sacrifices during the war of the American Revolution, achieved the independence of the American people; to unite and promote among their descendants; to inspire them and the community at large with a more profound reverence for the principles of the Government founded by our forefathers; to encourage historical research in relation to the American Revolution; to acquire and preserve the records of the individual services of the patriots of the war, as well as documents, relics, and landmarks; to mark the scenes of the Revolution by appropriate memorials; to celebrate the anniversaries of the prominent events of the war and of the Revolutionary period; to foster true patriotism; to maintain and extend the institutions of American freedom, and to carry out the purposes expressed in the preamble to the Constitution of our country and the injunctions of Washington in his farewell address to the American people.

To maintain the high standard of conduct expected and deserved by our Forefathers, our members, and the American public, NSSAR operates under the Code of Business Ethics and Conduct outlined below.

Section 2. Compliance Requirements. All members, employees, and volunteers are required to comply with applicable federal, state, and local laws and regulations and with NSSAR and North Carolina SAR (hereafter, jointly, NCSSAR) bylaws and policies.

Section 3. Prohibited Actions. No member, employee, or volunteer shall engage in the following actions:

- Authorize the use of or use for the benefit or advantage of any person, the name, emblem, endorsement, services, or property of NCSSAR, except in conformance with NCSSAR policy.
- Accept or seek on behalf of any other person, any financial advantage or gain of other than nominal value offered because of the member's, employee's, or volunteer's affiliation with NCSSAR.
- Publicly use any NCSSAR affiliation in connection with promotion of partisan politics, religious matters, or positions on any issue not in conformity with the official position of NCSSAR.

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- Disclose any confidential NCSSAR information that is available solely because of the member's, employee's or volunteer's affiliation with NCSSAR to any person not authorized to receive information or use to the disadvantage of NCSSAR any such confidential information, without the express authorization of NCSSAR.
- Knowingly take any action or make any statement intended to influence the conduct of NCSSAR in such a way as to confer any financial benefit on any person, corporation, or entity in which the individual has a significant interest or affiliation.
- Operate or act in a manner that creates a conflict or appears to create a conflict with the interests of NCSSAR and any organization in which the individual has a personal, business, or financial interest.
- Retaliate against any member, employee or volunteer who seeks advice about, raises a concern with, or makes a complaint about fraud, waste, abuse, policy violations, discrimination, illegal conduct, unethical conduct, unsafe conduct, or any other misconduct by the organization, its members, employees, or volunteers.
- Operate or act in any manner that is contrary to the best interest of NCSSAR.
- Conduct in disseminating via multi-party e-mail, mail, social media or other means, disparaging, maligning, false, or harassing comments or statements concerning compatriots.
- Issuance of circulars, communications, or pronouncements regarding NCSSAR purporting to represent official policies of the NCSSAR via multi-party e-mail, mail, social media, or other means, without the approval of the Executive Committee.
- Misappropriate or convert to personal use the personal or intellectual property of the NCSSAR without the approval of the Executive Committee.

Section 4. Reporting Responsibility. Each member, employee, volunteer, and other stakeholder of NCSSAR has an obligation to report, in accordance with this Code of Business Ethics and Conduct Policy, violations and suspected violations of this Policy.

Section 5. Handling of Reported Violations. Violations of this Policy will be reported and addressed as specified by NCSSAR Bylaw XVI.

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II. Conflict of Interest Statement and Code of Organizational Conduct

Section 1. Purpose. North Carolina SAR (hereafter NCSSAR) is a not for profit, tax-exempt organization. Maintenance of its tax-exempt status is important for both continued financial stability, and public and member support. Therefore, the Internal Revenue Service, as well as other regulatory agencies, tax officials and other stakeholders view the policy and operations of the North Carolina Sons of the American Revolution (NCSSAR) as a public trust, which is subject to scrutiny by and accountable to such authorities as well as its constituents.

Consequently, there does exist between NCSSAR and its officers, committee chairmen, executive committee members, and the public a fiduciary duty that carries with it a broad and clear duty of fidelity and loyalty. The officers, committee chairmen, and executive committee members have the responsibility to administer the affairs in an honest and prudent manner, exercising the best skill, abilities, and judgment for the sole benefit of NCSSAR. Those persons who serve in leadership capacities shall exercise good faith in all matters and transactions and shall refrain from practices that allow personal gain or benefit due to knowledge or influence. The interest of the SAR shall be the priority in all decision and actions.

Section 2. Persons Concerned. This code and statement are intended for all Officers, Executive Committee members, and others as so determined by the Board of Managers of NCSSAR. All persons who may influence decisions of NCSSAR may be added at any time.

Section 3. Areas of Potential Conflict. Conflicts may arise in relations to Officers, Executive Committee members, and others, with any of the following third parties:

1. Persons and firms supplying goods and services to NCSSAR.
2. Persons and firms from whom NCSSAR leases property or equipment.
3. Persons and firms with whom NCSSAR is maintaining or plans to maintain a business relationship that involves the sale of real estate, securities, or other property.
4. Other organizations.
5. Donors and others supporting NCSSAR.
6. Agencies, organizations, and associations that affect the operations of NCSSAR.
7. Family members, close associates, and other employees.

Section 4. Nature of Conflict of Interest. A conflicting interest may be defined as an interest, direct or indirect, with any person or firms mentioned in Section 3. Such interest may arise from the following activities:

1. Owning stock or holding debt or other proprietary interest in a third party dealing with NCSSAR.

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2. Holding office, serving on the board, participation in management, or being otherwise employed or previously employed with any third party who conducts business or intends to conduct business with NCSSAR.
3. Receiving remuneration for services with respect to individual transactions involving NCSSAR.
4. Using the time, personnel, equipment, goodwill, or other resources of NCSSAR for activities other than approved activities, programs, and functions.
5. Receiving personal gifts, professional opportunities or loans from third-party vendors conducting business or intending to conduct business with NCSSAR. Receipt of any gift of cash is prohibited. Gifts with a value of less than \$25 (twenty-five dollars) may be accepted only if the acceptance avoids a discourtesy.

Section 5. Interpretation of Policy. The areas of conflicting interest listed in Sections 3 and 4 are examples of potential conflicts and may be expanded as situations dictate. All persons who serve in leadership and critical areas of NCSSAR shall use best judgment to determine any possible conflicts. The NCSSAR Chancellor shall be consulted on any question of this policy.

Persons in leadership positions of NCSSAR shall disclose any potential conflict before transactions are consummated. The leadership shall scrutinize all transactions and disclose any activities that are, or have the appearance of, a conflict to the Board of Managers immediately upon knowledge of such activities.

This policy, once enacted, shall be mandatory for all affected members. Any change of the policy will require a two-thirds affirmative vote of the Board of Managers of NCSSAR. Such vote will occur at a called meeting of the Board of Managers.

Section 6. Disclosure Policy and Procedure. Transactions with parties with whom a conflicting interest exists may only be undertaken when all four (4) stipulations are met:

1. The conflict of interest is fully disclosed.
2. The person with the conflict refrains from discussion and approval of such transaction.
3. A competitive bid or comparable valuation exists.
4. The leadership, Executive Committee, Board of Managers, or duly constituted committee determines that the transaction serves the best interest of NCSSAR.

Disclosure shall be made to the NCSSAR President (NCSSAR Senior Vice President, if the NCSSAR President is the person in conflict) and the NCSSAR Chancellor, who shall bring the matter to the Board of Managers for discussion and resolution.

The duly constituted committee shall determine whether a conflict exists. Further, the constituted body shall determine in a fair, just, and reasonable manner if the approval of such transaction with the disclosed conflict best serves the interest and mission of NCSSAR.

A NCSSAR Code of Conduct Statement must be signed each year by all Officers, Executive Committee members, and others as so determined by the Board of Managers of NCSSAR.

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Section 7. Handling of Reported Violations. Violations of this Policy will be reported and addressed as specified by NCSSAR Bylaw XVI.

III. Records Retention and Destruction Policy

Section 1. Purpose of Records. North Carolina SAR (hereafter, NCSSAR) must maintain books and records to show that it complies with tax rules. The organization must be able to document the sources of receipts and expenditures reported on Form 990, *Return of Organization Exempt from Income Tax* or Form 990-EZ, *Short Form Return of Organization Exempt from Income Tax*, and Form 990-T, *Exempt Organization Business Income Tax Return*.

If NCSSAR does not keep required records, it may not be able to show that it qualifies for tax-exempt status. Thus, NCSSAR may lose its tax-exempt status. In addition, NCSSAR may not be able to complete its return accurately and may be subject to penalties. When good recordkeeping systems are in place, NCSSAR can evaluate the success of its programs, monitor its budget, and prepare its financial statements and returns.

Section 2. Records to be kept. Except in a few cases, the law does not require a special kind of record. NCSSAR should choose any recordkeeping system suited to its activities, that clearly shows the organization's income and expenses. NCSSAR activities should determine the type of records that should be kept for federal tax purposes. NCSSAR should set up a recordkeeping system using an accounting method that is appropriate for proper monitoring and reporting of its financial activities for the tax year. Since NCSSAR has more than one program, it should ensure that the records appropriately identify the income and expense items that are attributable to each program.

Section 3. Period of Retention. NCSSAR must keep records for federal tax purposes for as long as they may be needed to document evidence of compliance with provisions of the Code. NCSSAR must keep records that support an item of income or deduction on a return until the statute of limitations for that return runs. After the statute of limitations has run NCSSAR can no longer amend its return and the IRS can no longer assess additional tax. Generally, the statute of limitations runs three years after the date the return is due or filed, whichever is later. NCSSAR may be required to retain records longer for other legal purposes, including state or local tax purposes.

NCSSAR record retention periods vary depending on the types of records and returns.

Permanent Records – Some records should be kept permanently. These include the application for recognition of tax-exempt status, the determination letter recognizing tax-exempt status, and

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organizing documents, such as articles of incorporation and by-laws, with amendments, as well as board minutes.

Employment Tax Records – NCSSAR must keep employment tax records for at least four years after the date the tax becomes due or is paid, whichever is later.

Records for Non-Tax Purposes – When records are no longer needed for tax purposes, NCSSAR should keep them until they are no longer needed for non-tax purposes. For example, a grantor, insurance company, creditor, or state agency may require that records be kept longer than IRS requires.

Section 4. NCSSAR Retention Policy. The following table provides the minimum requirements for determining document retention policy.

Type of Document	Minimum Requirement
Accounts payable ledgers and schedules	7 years
Audit Reports	Permanently
Bank Reconciliations	2 years
Bank Statements	3 years
Checks (for important payments and purchases)	Permanently
Conflict of Interest statements	4 years
Contracts, mortgages, notes and leases (expired)	7 years
Contracts (still in effect)	Permanently
Correspondence (general)	2 years
Correspondence (legal and important matters)	Permanently
Correspondence (with customers and vendors)	2 years
Deeds, mortgages, and bills of sale	Permanently
Depreciation Schedules	Permanently
Duplicated deposit slips	2 years
Employment applications	3 years
Expenses Analyses/expense distribution schedules	7 years
Year End Financial Statements	Permanently
Insurance Policies (expired)	3 years
Insurance records, current accident reports, claims, policies, etc.	Permanently
Internal audit reports	3 years
Inventories of product, materials, and supplies	7 years
Invoices (to customers, from vendors)	7 years
Minutes books, bylaws, and charter	Permanently
Patents and related papers	Permanently
Payroll records and summaries	7 years
Personnel files (terminated employees)	7 years
Retirement and pension records	Permanently

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Tax returns and worksheets	Permanently
Timesheets	7 years
Trademark registrations and copyrights	Permanently
Withholding tax statements	7 years

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Section 5. Electronic. NCSSAR Officers should follow the above guidance in Section 1 thru Section 4 in determining the electronic records that should be retained and the length to be retained.

Section 6. Record Destruction. All records (manual and electronic) should be destroyed after the expiration of the retention period unless there is a reason to retain them longer.

The destruction of each record should be performed by two members of the Audit Committee and must be documented. Documentation of the records destroyed must include the date destroyed, description of the record destroyed and the name of the person/persons destroying the record.

Destruction of documents will be suspended when NCSSAR is notified of an investigation by a regulatory authority.

Section 7. Handling of Reported Violations. Violations of this Policy will be reported and addressed as specified by NCSSAR Bylaw XVI.

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North Carolina SAR Discipline, Procedure, and Due Process Policy

Section 1. State Ethics Committee. When necessary, the NCSSAR President will appoint a State Ethics Committee. The committee will be composed of no fewer than five voting members including at least two (2) past State Presidents, and such other members as needed to have an odd number of committee members. The President will appoint one of the committee members as the committee chairman who will preside over any investigations or hearings. One member of the committee will be appointed as the secretary for the purpose of recording and taking notes of the testimony before the committee. If any member of the committee recuses himself because of a conflict of interest, then the President will appoint a replacement member.

Section 2. State Ethics Committee Procedures. After referral of a report or complaint to the State Ethics Committee, it shall review the information presented including the reports of any investigations. The Committee will first consider whether the conduct alleged in the report or complaint, if true, constitutes a material violation of the ethical standards of the NCSSAR, as defined in Article XVI §2 of the NCSSAR Bylaws. The State Ethics Committee will review the report or complaint, reports of the investigation and all evidentiary materials submitted or generated during such investigation to determine whether there is a sufficient basis to proceed with a hearing.

- a. If the Committee determines that the alleged conduct does not constitute a material violation of any of those ethical standards, they will take no further action and dismiss the report or complaint.
- b. If the Committee determines that the alleged conduct may constitute a violation, they will provide the factual allegations to the respondent (or “subject”) and request that the subject respond to those allegations. The response must be in writing and must be signed and dated by the subject.
- c. If the Committee determines that a hearing is necessary, the chairman will notify the subject of the alleged violation, the complainant (if applicable), and any potential witnesses of the hearing time, date, and location. The notices shall be made in a manner designed to ensure that everyone is apprised of the hearing and may be made by multiple methods but at least one notice to each person must be sent by USPS registered mail return receipt requested. The method of notice shall

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be documented. The hearing is closed to the public and to other SAR members, and the only people permitted in the hearing are the State Ethics Committee members, any investigators who participated in the investigation, the subject of the report or complaint and his attorney (if applicable), or his advocate, and any witnesses while they are giving testimony. The subject of the complaint may retain an attorney so long as he is a member of the SAR. Alternatively, the subject may have an advocate to assist him who must be a member of the SAR. All participants in the hearing must preserve the confidentiality of the proceedings. At the conclusion of the hearing the Committee will consider the materials and testimony and make a decision that will be transmitted to the NCSSAR President.

The hearing will be conducted as follows:

1. The hearing will be recorded, and a transcript made of the proceedings. The Ethics Committee may employ a court reporter, a recording device, or any other method legal in North Carolina.
2. The hearing will be informal and the rules of evidence and procedure, which may be applicable in North Carolina, are not in effect.
3. The order of the hearing will be as follows:
 - i. All witnesses will be sworn in.
 - ii. The investigator for the NCSSAR will make an opening statement.
 - iii. The subject, his attorney or his advocate may make an opening statement.
 - iv. The chairman shall call any witnesses who have information relevant to the complaint. The investigator may ask questions of any witnesses and any members of the committee may ask questions.
 - v. The subject, or his attorney or advocate may ask questions of any witnesses for the committee.
 - vi. The subject may then call witnesses on his behalf, and the members of the committee may ask questions of the subject's witnesses.
 - vii. At the conclusion of all witness testimony the chairman will allow the investigator and the subject or his attorney or advocate to make a closing statement.
 - viii. After all witness testimony and closing statements the committee will deliberate in private and reach a decision by majority vote.
 - ix. At the conclusion of the hearing all written materials introduced into the hearing will be collected and made a part of the record of the proceedings, along with a recording.
- d. If the Committee finds that the subject of the report or complaint did violate ethical rules, then

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the Committee will send the complete record of the hearing as well as any recommended sanctions to the NCSSAR President who will forward this record to the Board of Managers. The President must also notify the subject of the decision of the Ethics Committee. The Committee may recommend a sanction that may include but is not limited to the following:

1. If the subject is a state officer, director, or appointed official, they may recommend that he be removed from that office permanently or for a specific period of time.
2. If the subject is a chairman of any committees or a member of any committees, then they may recommend that he be removed from those committees permanently or for a specific period.
3. If the subject is involved in any activities on behalf of the NCSSAR such as color guard, participating in youth activities or participating in parades or other public events, then they may recommend that he be prohibited from participating in those activities permanently or for a specific period.
4. They may recommend that he be suspended from any or all chapter and state activities, meetings, or events permanently or for a specific period of time.
5. They may recommend probation for a specific period, stating the basis for the probation and setting forth any provisions of the probation. The subject will be advised that if the terms of probation are violated that the State Ethics Committee will take up the matter again and may recommend additional sanctions.
6. They may recommend that the subject be given a private admonition setting forth the prohibited conduct. A private admonition is confidential.
7. They may recommend that the subject be given a public reprimand setting forth the prohibited conduct and the reprimand may be promulgated in any manner specified by the Board of Managers.
8. They may recommend that the subject be expelled from the NCSSAR.

e. A Compatriot who is the subject of a report or complaint is entitled to a hearing before the State Ethics Committee on the proffered allegations. However, the compatriot may waive his right to a hearing and agree to accept a sanction offered by the State Ethics Committee. The agreement must contain a statement in which the subject of the report or complaint waives his rights to a hearing and accepts the sanction. The agreement must contain the following provisions:

1. The agreement must be in writing and signed by the Compatriot and the chairman or vice-chairman of the State Ethics Committee;
2. The subject must acknowledge that the agreement is in lieu of a pending disciplinary proceeding;

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3. The subject must agree to waive his right to appeal the sanction to the Board of Managers;
 4. The type of sanction will be clearly specified and must conform to the sanctions listed in this Policy. Upon execution of the agreement by both parties the State Ethics Committee will retain jurisdiction over the report or complaint until the successful completion of the requirements in the sanction;
 5. If the agreement is for the subject to resign from the NCSSAR, then it may also contain a provision that he not be allowed to reapply for membership for a period not to exceed 24 months;
 6. The agreement shall be confidential, unless subsequent proceedings require that confidentiality provisions be removed for purposes of further enforcement;
 7. The agreement is subject to approval by a two-thirds (2/3) majority vote of the Board of Managers.
- f. The report of the State Ethics Committee is a recommendation. Any sanction will be determined by the Board of Managers, as detailed in NCSSAR Bylaws, Article XVI.

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**Official Handbook
of the
North Carolina Society
Volume I**

August 20, 2025

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Chapter 1 – North Carolina Society History and Organization

A. The National Society Sons of the American Revolution

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

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

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

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

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

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

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

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

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

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

B. History of the North Carolina Society SAR

The North Carolina Society of the Sons of the American Revolution (North Carolina SAR) conducted its organizational meeting in Washington, North Carolina on February 22, 1911. Stephen C. Bragaw was the first President and served until 1913. The Society was discontinued in 1920; however, in 1922, the National Society appointed a "Special Organizer", Maj. John F. Jones, of Blacksburg, South Carolina to oversee both the Society of North Carolina and South Carolina. Subsequently, Mr. Harrison Otis re-organized the North Carolina Society at the Sir Walter Hotel in Raleigh on April 27, 1928 with 333 members. In more recent years, membership has grown to over 1,500 members. The North Carolina Charter from the National Society is dated May 1928.

The North Carolina Society hosted the National SAR Congress in Charlotte May 17-21, 1931. In honor of the Society's 100th anniversary year of organization, the North Carolina SAR hosted the National Congress in Winston-Salem a second time July 9-13, 2011. The Society is honored to host the National Congress a third time, in Greensboro, July 10-16, 2026, celebrating the 250th Anniversary of the Nation's Independence.

C. 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

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composed of twenty-nine (29) Chapters divided into five (5) Regions, each governed by a Region Vice President.

D. Handbook

The Official Handbook of the North Carolina Society of the Sons of the American Revolution was prepared and distributed by Compatriot Nat Clark up through the 2003 Edition. We are indebted to Nat for his dedication in providing the format and material contained herein, and for making the Handbook available. It is a valuable tool for the North Carolina SAR membership to have this reference guide.

Additional information continues to be offered by other members of the North Carolina SAR to make this a work in progress. In 2008, it was put in an electronic format by Compatriot Sam Powell and is currently available on the North Carolina SAR web site. Individual pages of the Handbook can be printed from this site.

Suggested changes to any of the five volumes of the NC SAR Handbook should be submitted to the Senior Vice President who chairs the Handbook Committee. The Handbook Committee will review all proposed changes and will prepare an initial draft. If the changes concern revision to the Bylaws (Volume I), then they will be referred to the Bylaws Committee for action per NC SAR Bylaws Article XVIII.

Significant or substantial changes will be submitted to the Council of Past State Presidents for review and comment and also to the Bylaws Committee to check compliance within the scope of State Bylaws. Once their comments are reconciled and incorporated, the proposed revision will be presented to the Executive Committee for final review and approval. Minor edits, spelling corrections, grammatical changes, or annual updates to award recipients (Appendix A) and state president (Chapter 1) to the Handbook do not have to undergo reviews or be approved by the Executive Committee.

After approval by the Executive Committee, the proposed Handbook revision will be incorporated and a new dated version of the Handbook will be given to the Webmaster for posting on the Society's web site. A Handbook summary showing the changes will be posted and made available at the Board of Managers meetings and Annual Convention.

A Master Copy of the Handbook (all five volumes) will be maintained in digital copy. MS Word will be the format for the digital master copy and will be maintained on the NC SAR Sharefile. A digital copy in Adobe Acrobat will be posted on the website and on the NC SAR Sharefile for reading or download.

E. Newsletter

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

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with Volume IV in September 1996, John O. Thornhill of Rose Hill took over as Editor. At the 107th National Congress held in Baltimore in July of 1997; *The Old North State* won Honorable Mention in the “Jennings H. Flathers Award” for newsletters of Societies under 500 members. Mr. G. Steven Pittard of Fayetteville became Editor with Volume XIII, Number 1, in the fall of 2005. At the 117th National Congress held in Williamsburg in July 2007, *The Old North State* won the “Grahame T. Smallwood, Jr. Award” for best news publication of more than 10 pages for a State Society with 500 or more members. After a four-year hiatus, Dr. Joe Sutton of LaGrange took over as Editor and restarted production of the newsletter in 2020.

F. Goals of the National Society SAR

National Society Sons of the American Revolution (SAR)

(Taken from the National Society SAR web site):

The Sons of the American Revolution is a historical, educational, and patriotic non-profit, United States 501(c) 3, corporation that seeks to maintain and extend:

- the institutions of American freedom
- an appreciation for true patriotism
- a respect for our national symbols
- the value of American citizenship
- the unifying force of “e Pluribus Unum” that has created, from the people of many nations, one nation and one people.

We do this by perpetuating the stories of patriotism, courage, sacrifice, tragedy, and triumph of the men who achieved the independence of the American people in the belief that these stories are universal ones of man’s eternal struggle against tyranny, relevant to all time, and will inspire and strengthen each succeeding generation as it too is called upon to defend our freedoms on the battlefield and in our public institutions.

G. Goals of the North Carolina Society SAR

1. The North Carolina SAR supports the mission and goals of the National Society SAR.
2. The long-term goals of the North Carolina SAR are:
 - a. Prepare for the 250th Anniversary
 - b. Grow the Membership to 2200 by 2025
 - c. Enhance SAR-DAR Partnerships
3. As members of the Sons of the American Revolution (SAR), we:
 - Honor individuals for outstanding and unusual patriotic achievement on a national, regional and local level.
 - Honor persons for outstanding bravery and self-sacrifice in the face of imminent danger.
 - Honor members of the United States Congress for outstanding service to the nation.

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- Honor outstanding high school students annually with the presentation of a Good Citizenship Award.
- Honor outstanding Junior and Senior ROTC cadets annually with the presentation of the ROTC Award.
- Honor Law Enforcement officials for outstanding service with a Law Enforcement Award.
- Select an outstanding Eagle Scout annually at the chapter, state and national level.
- Honor an outstanding student for winning the Knight Essay Contest.
- Assist veterans in Veterans Hospitals.
- Conduct a national historical orations contest annually.
- Conduct a national youth video contest annually.
- Sponsor Boy Scout troops and chapters of the Children of the American Revolution.
- Place SAR Markers at the grave sites of Revolutionary War Patriots and SAR Members.
- Commemorate Revolutionary War Patriots with appropriate ceremonies.
- Participate in new citizenship swearing-in ceremonies.
- Observe patriotic anniversaries.
- Cooperate with the: National Society of the Daughters of the American Revolution, Children of the American Revolution and other hereditary organizations in the promotion of patriotism.

H. Presidents of the North Carolina Society

1911-1913 * Judge Stephen Camberleng Bragaw –Beaufort, Oakdale Cemetery, Washington, NC
1913-1914 * Frank Cannon Kugler – Beaufort, Oakdale Cemetery, Washington, NC
1914-1916 * Earl Arnold Harrington – Nathanael Greene, Whitmarsh Memorial Pk, Ambler, PA
1916-1920 * Frank Havens Bryan – Beaufort, Oakdale Cemetery, Washington, NC
1928-1929 * Harrison Gray Otis – West Virginia, Southern Memorial Park, Biloxi, MS
1929-1930 * Park Mathewson, Jr.-Green-Wood Cemetery, Brooklyn, NY
1930-1931 * William Alexander Graham, Jr. – Machpelah Presbyterian, Lincolnton, Lincoln, NC
1931-1932 * Honorable Cameron A. Morrison – Elmwood Cemetery, Charlotte, NC
1932-1933 * Sydenham Brevard Alexander - Elmwood Cemetery, Charlotte, NC
1933-1934 * Ralph Bolles Coit – Forest Lawn Cemetery, Greensboro, NC
1934-1935 * William Andrew Hunt - Elmwood Cemetery, Oxford, NC
1935-1940 * Henry Mauger London, Jr – St Bartholomew’s Episcopal, Pittsboro, NC
1940-1941 * Major William Oliver Smith, Sr – Oakwood Cemetery, Raleigh, NC
1941-1943 * Captain McDaniel Lewis- Forest Lawn Cemetery, Greensboro, NC
1943-1946 * Hiram Dennett Jones – Maplewood Cemetery, Durham, NC
1944-1946 * Willis Grandy Briggs – Oakwood Cemetery, Raleigh, NC
1946-1948 * John Edward Allen – Fairview Cemetery, Warrenton, NC
1948-1949 * James Gwaltney Westwarren MacClamroch-Greensboro, NC
1949-1951 * Judge Henry Alexander Grady – Greenleaf Memorial Park, Trent Woods, NC
1951-1952 * William Alderman Parker-Montlawn Memorial Park, Raleigh, NC
1952-1953 * Carson Devane Baucom – Oakwood Cemetery, Raleigh, NC
1953-1955 * Maj. William Oliver Smith, Jr, USA (Ret) – Garrett-Hillcrest Memorial Park, Waynesville, NC
1955-1957 * Horace Bryon Lindsey, Sr- Chapel Hill Memorial Gardens, Kansas City, KS
1957-1959 * Phillip Rahm Carlton, Jr.-Forest Lawn Cemetery, Greensboro, NC
1959-1961 * Travis Brodnax Callum – Green Hill Cemetery, Greensboro, NC
1961-1962 * Col. David Lydall Hardee, USA (Ret) – Maplewood Cemetery, Durham, NC
1962-1963 * Victor Hugh Idol –Rockingham County, Riverview Cemetery, Madison, NC
1963-1964 * Rear Admiral Ligon Briggs Ard, USN, (Ret) - Blue Ridge Gardens of Memory, Pisgah Forest, NC

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- 1964-1965 * William Lewis Callum, III – Elmwood Cemetery, Charlotte, NC
1965-1966 * James Macomber Robinson - Edenton, NC
1966-1969 * Dr. Alvin Marcus Fountain – John R. Fountain Cemetery, Richlands, NC
1969-1970 * Albert Carl Wirth, Jr.-Raleigh, Raleigh Memorial Park, Raleigh, NC
1970-1971 * William Lee Ramsey-Lafayette Memorial Park, Fayetteville, NC
1971-1972 * Capt. Robert Strickland Beckham- Orange-Durham, Wilmington National Cemetery, NC
1972-1974 * Dr. Ralph Hardee Rives-Rocky Mount, Elmwood Cemetery, Enfield, NC
1974-1976 * Dr. Herbert Clarence Bradshaw-Pisgah Baptist Church Cemetery, Durham, NC
1976-1977 * David Patterson Henry, II-Gen Francis Nash, Old Chapel Hill Cemetery, Chapel Hill, NC
1977-1979 * William Austin Cofer- Raleigh, Raleigh Memorial Park, Raleigh, NC
1979-1980 * William Martin Stanley-Lower Cape Fear, Stanley Cemetery, Dublin, GA
1980-1981 * Richard Franklin Boddie- Gen Francis Nash, Maplewood Cemetery, Durham, NC
1981-1983 * The Rev. Walser H. Allen, Jr.-Lower Cape Fear-Oleander Memorial Gardens, Wilmington, NC
1983-1984 * The Rev. Leonard Wesley Topping-Evergreen Cemetery, Charlotte, NC
1984-1985 * Col. Howland Guild Taft, USA (Ret) -Jeffrey, NH
1985-1987 * Col. William Alexander Smith, Jr., USA (Ret)-Montlawn Cemetery, Raleigh, NC
1987-1989 * Paul Bailey Osgood- Fairfield Cemetery, New Bern, NC
1989-1991 * Commander Thomas Rudolph Topping, USN (Ret)-Mecklenburg, Charlotte, NC
1991-1993 * CDR Lee Warwick Porter, Jr., USN (Ret)-Lower Cape Fear-1st Baptist Church, Wilmington, NC
1993-1995 * George Nelson Bass-Sharon Memorial Park, Charlotte, NC
1995-1997 * Thomas Nathan Clark-Alamance Battleground-Eastview Cemetery, Wadesboro, NC
1997-1999 * The Rev. Dr. Charles Elbert Page-Mecklenburg, Greensboro, NC
1999-2001 * William David Snyder, Jr-Nathanael Greene, Greensboro, NC
2001-2003 Dr. Randy Darrell Steele-Salisbury-LTC John Phifer, Fort Mill, SC
2003-2005 * Frank Grady Hall, III-Salisbury, Salisbury, NC
2005-2007 LTC Joe Edwin Harris, USA (Ret) -le Marquis de Lafayette, Ivins, UT
2007-2009 Dr. Samuel Christopher Powell-Alamance Battleground, Burlington, NC
2009-2010 LTC Frank Nelson Horton, USA (Ret)-le Marquis de Lafayette, Fayetteville, NC
2010-2011 * John Oakley Thornhill – Lower Cape Fear, Rose Hill, NC
2011-2012 George Steven Pittard – le Marquis de Lafayette, Fayetteville, NC
2012-2013 Glenn Paul Sappie – Raleigh, Raleigh, NC
2013-2014 Col James Henry Wood, USA (Ret) – Mecklenburg, Charlotte, NC
2014-2015 MSgt C. Kenith Wilson, USAF (Ret) – Halifax Resolves, Roanoke Rapids, NC
2015-2016 * Timothy Wayne Berly – Mecklenburg, Raleigh Memorial Park, Raleigh, NC
2016-2017 Lt Col Gary O. Green, USAF (Ret) – Lower Cape Fear, Wilmington, NC
2017-2019 SMSgt George K Strunk, USAF (Ret) – General George Washington, Greenville, NC
2019-2020 James Arthur Becker – Raleigh, Raleigh, NC
2020-2021 Frederick Douglas Learned – Bethabara, Winston-Salem, NC
2021-2023 Rear Admiral Jay Allan DeLoach, USN (Ret) – New Bern, New Bern, NC
2023-2025 Steve A. Van Pelt – Alamance Battleground, Burlington, NC
2025- Stephen P. McKee – Mecklenburg, Charlotte, NC

* Deceased

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I. Chapters of the North Carolina SAR

Region 1 - Northeast Chapters:

General George Washington, Washington

Chartered: October 14, 2006

Organizing President: Ronald B. Dailey

Halifax Resolves, Halifax

Chartered: April 12, 2003

Organizing President: Steven F. Avent

Albemarle, Hertford

Chartered: October 13, 2007

Organizing President: Melvin Hawkins, Jr.

Raleigh, Raleigh

Chartered: April 27, 1928,

Organizing President: Kent Mathewson

Region 2 - Southeast Chapters:

Le Marquis de Lafayette, Fayetteville

Chartered: December 1968

Organizing President: William L. Ramsey

Re-organized: May 3, 2000

Organizing President: LTC Joe E. Harris

Lower Cape Fear, Wilmington

Chartered: January 24, 1969

Organizing President: Charles J. Blake

New Bern, New Bern

Chartered: April 27, 1928

Organizing President: Thomas G. Hyman

Re-chartered: October 6, 1979

Organizing President: Charles E. Bradshaw

Lumber River, Lumberton

Chartered: October 23, 2010

Organizing President: Sam West

Patriot Isaac Carter, North Harlowe

Chartered: September 3, 2016

Organizing President: Edward Earl Carter

Col Alexander Lillington, Wallace

Chartered: January 21, 2018

Organizing President: D. Henry Campbell

General Andrew Jackson, Jacksonville

Chartered: April 27, 2023

Organizing President: Danny Hilton

Region 3 - Piedmont Chapters:

Alamance Battleground, Burlington

Chartered: May 19, 1928

Organizing President: Eugene Holt

Re-chartered: September 17, 1990

Organizing President: Thomas N. Clark

Bethabara, Winston-Salem

Chartered: October 29, 1994

Organizing President: James B. Stoeber

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Re-organized November 8, 2014

Re-organizing President: Frederick D. Learned

General Francis Nash, Chapel Hill/ Durham

Chartered: April 27, 1928,

Organizing President: William G. Bramham

Re-organized: June 18, 2006

Organizing President: Emmett “Jay” Stobbs

Nathanael Greene, Greensboro

Chartered: April 27, 1928

Organizing President: Charles G. Harrison

Re-chartered: September 13, 1993

Organizing President: Clarence A. Tillery

Sandhills, Pinehurst

Chartered: August 22, 2020

Organizing President: Bruce Fensley

Yadkin Valley, Statesville/Elkin/Jonesville

Chartered: October 14, 2006

Organizing President: Ellis C. Hamby

Region 4 – Foothills Chapters:

Battle of Kings Mountain, Kings Mountain

Chartered: October 7, 2013

Organizing President: Doyle Campbell

Catawba Valley, Hickory

Chartered October 11, 1997

Organizing President: Dr. Richard Hefner

Colson’s Mill, Norwood

Chartered: July 14, 2008

Organizing President: Jonathan Underwood

Lt. Col. John Phifer, Concord

Chartered: January 26, 2002

Organizing President: Dr. Randy D. Steele

Mecklenburg, Charlotte

Chartered: April 27, 1928

Organizing President: Dr. John R. Irwin

Re-chartered: April 11, 1975

Organizing President: E. Allen Royce, III

Salisbury, Salisbury

Chartered: January 12, 1997

Organizing President: F. Grady Hall, III

Region 5 - Mountain Chapters:

Blue Ridge, Asheville

Chartered: April 21, 1928

Organizing President: Lawrence S. Holt

Col Alexander Erwin, Morganton

Chartered September 12, 2015

Organizing President: Wayne Davis

Lt. Col. Felix Walker, Waynesville

Chartered: September 22, 2001

Organizing President: Richard Walker, Jr.

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Capt. George Dickey, Rutherfordton

Chartered: October 23, 2010

Organizing President: James E. Brewer

Western Waters, Waynesville

Chartered: April 21, 2012

Organizing President: William A. McEntire, Jr.

Col. Daniel Boone, Boone

Chartered: August 20, 2022

Organizing President: Robert A. Crum

At-Large Chapter:

Old North State, State-wide membership

Chartered: April 19, 2008

Organizing President: Robert P. Yankle II

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Chapter 2-Duties of Officers

A. President

The President provides overall leadership to the Society in implementing the programs that fulfill the purposes of the National Society and this Society within the State of North Carolina. He:

1. Acts in accordance with the policies and guidelines provided by the National Society and by the bylaws of this Society.
2. Ensures that the expenditures of the Society remain within the budget of the Society.
3. Presides at all meetings of the Society and of the Board.
4. Serves as the executive head of the Society.
5. May appoint members of the Society to assist the Officers in the performance of his duties.
6. Appoint a member of the Society to act as chairman of a committee.

B. Senior Vice President

The Senior Vice President assists the President in the discharge of the President's duties. He:

1. Acts as the presiding officer and performs the normal functions of the President in the absence of the President from any meeting.
2. 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.
3. Serves as the Chairman of the Awards and Budget Committees.
4. Responsible for the annual review and update of all volumes of the Society Handbook.

C. Region Vice Presidents

The five Regional Vice Presidents are the President's assistants and representatives in their respective regions. A Region Vice President will

1. Act to strengthen Chapter membership and support Chapter activities in his region.
2. Attend a meeting of each Chapter in his region annually.
3. Offer to induct new Chapter officers in the absence of the State President.
4. Serve as a mentor to Chapter Presidents and to those who are forming new Chapters.
5. Monitor dues collection by Chapters, making sure that dues notices are mailed in September and submitted to the State before the December deadline.
6. Encourage Chapter Presidents to turn in their annual reconciliation report, and submit Chapter reports, when required, prior to each State Society meeting.
7. Ensure that all Chapters in his region have made the required IRS tax filing each year.
8. Encourage attendance of Chapter members to SAR sponsored events, such as Board meetings, Annual State Meetings and National Congresses, and lead by example.
9. Recommend and encourage promising Chapter leaders to run for State Office.
10. Recommend region compatriots for Society Awards and be a conduit through whom Chapters may forward recommendations to the Society Awards Chairman.

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D. Secretary

The Secretary shall:

1. Keep the minutes and records of the Society and conducts its correspondence.
2. Distribute copies of the minutes of each meeting of the Society and its Board to each officer, past president and chapter president of the Society within 30 days of that meeting.
3. Be responsible for the annual consolidation of chapter reconciliation reports into a Society membership reconciliation. Upon completion, issue membership cards.
4. Provides the National Registrar with updates on Society membership.
5. Annually, collect and retain the statements of agreement to comply with the Code of Conduct and Conflict of Interest policies by members of the ExCom Board and the Finance, Financial Review, Investment and George Washington Endowment Foundation committees.

E. Treasurer

The Treasurer shall:

1. Collect fees, dues and other income payable to the Society.
2. Maintain accounts in the name of the Society in a bank or banks approved by the Board.
3. Deposit and disburse 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 the Society.
4. Keep an account of the receipts and disbursements to and from the Society accounts.
5. Render an accounting of the funds in his charge at each Annual Meeting and Board meeting.
6. Provide such financial information relative to Society as the officers may from to time require.

F. Registrar

The Registrar shall:

1. Investigate 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.
2. Maintain custody of all genealogical records of the Society.
3. Present to the members at each Annual Meeting a list of applications submitted and accepted by the National Registrar General for the year.

G. Historian

The Historian shall:

1. Collect and maintain 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.
2. Maintain records on the major activities of the Society and its chapters.

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H. Chaplain

The Chaplain should be an ordained clergyman. The Chaplain shall:

1. Open and close Annual and Board meetings with such prayers and devotional guidance as is proper for such occasions.
2. Conducts a remembrance observance at the Annual meeting in memory of members of the Society who have passed on since the last Annual Meeting.
3. Send condolences to the families of recently deceased members of the Society.

I. Genealogist

The Genealogist shall:

1. Conduct genealogical workshops.
2. Assist potential applicants in preparing their membership applications.
3. Assists the Registrar in reviewing new and supplemental applications.
4. Acts as the Registrar in his absence.

J. Webmaster

The Webmaster shall:

1. Be responsible for the organization, management, presentation and format of all materials that appear on the Society website.
2. Edit and publish all materials submitted by other officers, committees and the Chapters.
3. Monitor and edit if necessary all materials published by others on the website.

K. Chancellor

The Chancellor is responsible for the State Society's legal affairs. He shall:

1. Be a member of the North Carolina Bar in good standing.
2. Render opinions on such questions of law or involving the Bylaws and Policies of the State Society or of the National Society, as may be referred to him by any officer of the State Society or by any chapter of the State Society.
3. Review resolutions and Bylaw and policy changes in accordance with such policies and guidelines as the State Society may establish.
4. Be responsible for reviewing all corporate filings and contracts.
5. Be point of contact for the State Society to National Society's Chancellor General and its Legal Advisory Committee.
6. Be the legal advisor to the State Executive Committee and shall be a member of the State Society's Risk Management and Ethics Committees.
7. Perform such additional duties as may be assigned by the President.

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L. Surgeon

The Surgeon shall be a practicing Doctor of Medicine or Osteopathy or one who has special training in first aid and cardiopulmonary resuscitation (CPR). He shall:

1. Provide medical care and advice for any Compatriot needing such care during State Society functions.
2. Be the medical advisor to the Executive Committee and shall chair the State Society's Medical Advisory Committee.
3. Be the point of contact for the State Society to the National Society's Surgeon General and Medical Advisory Committee.
4. Make regular reports to the members regarding relevant public health matters. 5. Perform such additional duties as may be assigned by the President.

M. Council of Past State Presidents

1. Composition. All past presidents of the Society who remain members in good standing are members of the Council of Past State Presidents (the Council). One Council member, elected by the members of the Council for a term of two years, will serve as chairman.
2. The Council advises the president of the Society. The president of the Society may refer such matters as he deems appropriate to the Council for its advice. These matters include, but not limited to:
 - a. annually recommends a candidate for the State Medal for Distinguished Service;
 - b. annually recommends a recipient of the NC George Washington Fellow award;
 - c. assists in identifying and mentoring potential Minuteman candidates; and
 - d. helping with strategic planning and the long-term goals of the Society.
3. Meetings. The president of the Society may call a meeting of the Council when he deems it necessary. The chairman may also call a meeting as he deems necessary. In any case, the Council should meet at least twice a year, preferably in-person but electronically if necessary.
4. Reports. The Council may issue reports to the Society president, the BOM or the general membership as it deems appropriate. The Society secretary will retain such reports as a permanent record.

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Chapter 3-Duties of Committees

A. Annual Meeting

This committee plans for, arranges and coordinates the conduct of the North Carolina Society Sons of the American Revolution (Society) annual meeting. It negotiates, as necessary and appropriate, hotel, restaurant and meeting venue reservations and contracts. It arranges non-meeting but related activities.

B. Americanism and Flag

This committee manages Society participation in the National Society Sons of the American Revolution (National Society) contests for the Allene Wilson Graves Award, Liberty Bell Award, President General's Cup and NC President's and Chapter Award competitions. It promotes the observance of flag etiquette within the Society. It encourages chapters of the Society to present National Society Flag Certificates to deserving individuals and entities who and that fly the United States flag for patriotic reasons. It collects information from chapters of the Society on those chapters' participation in the National Society flag certificate program. It submits that information to the Society Awards committee.

C. Awards

This committee manages Society participation in the National Society Awards and Medals programs under guidelines promulgated in Vols. V and VI of the National Society Handbook.

D. Bylaws

This committee reviews and edits proposed amendments to the Society bylaws originating from within and without the committee, submits such proposals to the Board of Managers (Board) for review and to the Society general membership for approval.

E. C.A.R. Liaison

This committee manages relations between the Society and the North Carolina Society Children of the American Revolution (C.A.R.). It maintains contacts with appropriate state C.A.R. officers; encourages chapters of the Society to support of C.A.R. activities; encourages Society members to become involved with C.A.R. activities; recruits male C.A.R. members to become members of the Sons of the American Revolution; and invites and escorts the state C.A.R. president and senior president to the Society annual meeting and other events as appropriate. Annually submits a completed C.A.R. Activity Streamer form to the NSSAR C.A.R. Liaison Committee.

F. DAR Liaison

This committee manages relations between the Society and the North Carolina Society Daughters of the American Revolution (DAR). It maintains contacts with appropriate state DAR officers; encourages chapters of the Society to support of DAR activities; and encourages Society members to become involved with DAR activities. The DAR Liaison invites and escorts the state DAR Regent and senior DAR officers to the Society annual meeting and other events as appropriate.

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G. Fundraising

This committee coordinates the fundraising activities of the Society. It distributes information on fundraising needs and opportunities. It coordinates fundraising drives. It coordinates with the Society Treasurer to ensure proper accounting for funds raised. It coordinates with the Society Secretary to ensure that donors of tax-deductible gifts receive receipts certifying the income tax deductibility of those gifts. It reports gifts to the Society to the Society President and to the Awards Committee so that donors receive recognition.

H. Education

This committee oversees the operation of the Society's Speakers Bureau. It develops and delivers presentations to students in the state. It maintains a list of teachers who and other entities that have requested presentations by members of the Society. It coordinates the chapter's annual submission of the Partners in Education certificate forms to the NSSAR Education Committee.

I. Executive

See Society Bylaws, Society Handbook Vol. 1, Art. VIII § 4.

J. Finance and Budget

This committee prepares and presents an annual Society budget for review by the Board of Managers (Board) and approval by the general Society membership. It receives estimated funding requirements from other Society committees and members and from others responsible for disbursing the funds of the Society. It analyzes the investment portfolio of the Society and recommends portfolio adjustments to the Board as appropriate.

K. Financial Review

This committee reviews the financial records of the Society as soon as possible after end of the Society's fiscal year. It reports its findings to the Board at the first meeting of the Board after the completion of the review.

L. George Washington Endowment Fund

This committee selects and names a Society member to receive the George Washington Fellow Award. When Society members' annual donations to the National Society's George Washington Fund from Society members equal or exceed one thousand dollars, the Society President forms the committee by appointing three or more Society members. When formed, the committee selects the honoree because of his having rendered outstanding service to the Society. The committee forwards the name of the honoree to the National Society. The honoree will receive the George Washington Fellow Award at a National Society Trustee's Meeting or National Society Annual Convention.

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M. Membership

This committee promotes the recruitment, orientation and retention of members. It maintains programs to acquaint potential members with the programs and activities of the National Society, the Society and chapters of the Society.

N. Nominating

This committee draws up a slate of candidates for the offices of the Society, as provided for in the bylaws of the Society, for presentation for review to the Board at its spring meeting and for election at the annual meeting of the Society. It will ensure that it has contacted each nominee and obtained that nominee's consent to his appearance on the slate and, if elected, his willingness to serve in the office for which he has been nominated.

O. Patriot Medal

This committee meets once a year to review and select candidates for the Patriot Medal. The Patriot Medal is awarded to those Compatriots who have demonstrated long, faithful and outstanding service at the state and/or chapter level.

P. Patriot Outreach

This committee manages Society participation the National Society Patriot Outreach program under guidelines promulgated on the National Society website.

Q. Patriot Records

This committee manages Society participation in the National Society Patriot Records and Grave Marking programs under guidelines promulgated on the National Society website, in Volume IV of the National Society Handbook and the National Society Grave Marking Manual.

R. Publicity and Newsletter

This committee manages informational communications within the Society and the Society's public relations activities, including recruitment of new members. It publishes *The Old North State*, the Society newsletter.

S. Veterans

This committee manages the Society's efforts to encourage and recognize individuals, chapters, and state-level activities in support of veterans including, but not limited to, the Veterans-to-Service Medal, General William C. Westmoreland Award, and the Partners in Patriotism certificates. Annually collect from the chapters and consolidate the USS Stark Memorial Reports to send to the NSSAR Veterans Committee for competition.

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T. Youth Programs

This committee manages Society participation in a number of National Society recognition programs for youth and educators under guidelines promulgated in Vol. VI of the National Society Sons of the American Revolution (National Society) Handbook. These programs are:

- 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
- Youth Video 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 for Elementary, Middle and High School

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Chapter 4 - North Carolina Compatriot Training Program

The North Carolina Compatriot Training Program is a multi-level approach focused on integrating new members into the SAR, their early involvement in chapter activities (e.g., committees and the Color Guard), and development of officers at the chapter and state levels. The orientation, involvement, development, and mentoring are key components for the retention and growth of our membership. These components also provide important underpinnings for an effective corps of chapter and state officers capable of executing the mission, goals, and programs of the Society.

The core mechanisms of the training programs are directed at:

- New members to learn about the SAR and its programs with the purpose of getting new members engaged early in chapter-level activities;
- Chapter officers and state officers to understand their roles and responsibilities; and
- Color Guard to acquire knowledge about uniforms, commands, salutes, and safety procedures for honoring our Patriot Ancestors and being the “face of the SAR”.

The roles and responsibilities for the NC Compatriot Training Program are:

1. Senior VP is in overall charge of implementing and executing the program, and for maintaining the training material up-to-date;
2. Regional VPs are responsible for the training and mentoring of the chapter presidents in their respective regions;
3. Chapter VPs are responsible for implementing and executing the training of chapter officers and for new members, and for assignment of mentors to new members; and
4. State Color Guard Commander is responsible for overseeing the execution of the Color Guard training including safe handling and firing of firelocks.

The training materials are available in PowerPoint and Adobe Acrobat (pdf) format on the Sharefile under NC Member/Training Material. The materials include:

1. New Chapter Members
 - a. New Member Guidebook
 - b. Fundamentals of the SAR Training
 - c. Medals & Insignia
 - d. Color Guard (Basic) Training
2. Chapter Leaders
 - a. Mentors
 - b. Chapter Officers
 - c. Chapter President
 - d. Chapter Color Guard Commander
3. State Leaders
 - a. State Officers

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Chapter 5-Fees and Dues

A. General

This Chapter supplements Art. V of the North Carolina Society Sons of the American Revolution (the Society) Bylaws. It defines fees and dues payable to the Society. It also contains the national fees and dues. Users should therefore consult the SAR Dues and Fees Chart, available online in the Forms Fees and Dues section at <http://www.ncssar.org/> to determine the correct amounts of National Society fees and dues.

B. Dues

1. Admission Charge. The regular admission charge, payment of which shall accompany all new applications includes the National Application Fee, National Dues, and the State Application Fee. The Admission Charge to accompany application for reinstatement of membership after resignation or drop for non-payment of dues includes National Dues, State Dues and a Reinstatement Fee. The Society follows the policy of the National Society regarding credit of dues paid by new and reinstated members.

2. Members Excused from Payment of Dues. For reasons contained in the National Society Constitution for National Society dues and for like reasons for Society dues, the Board of Managers (the Board) may excuse any member from payment of those dues. A member on active duty military service and deployed to a combat zone does not pay State Society dues for the duration of that deployment. The member must request this suspension and must inform the chapter and the Society Secretary of his status. Such a deployment does not entitle the member to a return of dues already paid.

3. Members Exempt from Payment of Dues. Honorary, Junior and Half-Century members are exempt from payment of dues.

4. Life Member Dues. Dues for Thomas N. “Nat” Clark (Nat Clark) life membership in the Society vary with the age at which an individual becomes a life member and can be found on the SAR Fees and Dues Chart available online at the NC SAR Website. A Nat Clark life member must also be a National Society life member. An applicant for a Nat Clark life membership must complete an application form and submit it to the State Secretary.

C. Fees

1. Application Fee. This fee is for submission of an application for membership in the Society. There is no reduction in the fee for family applications, i.e., multiple applications based on the same genealogical line or connected by relationship not more than two linkages removed from the primary applicant’s line.

2. Waived Application Fee. There is no fee for submission of an application for membership in the Society from an applicant who has not attained the age of 22 and is a member in good standing

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of the Children of the American Revolution, Children of the Revolution or Washington Guard, provided that two members of the Society have recommended the applicant and that a transfer document for one or more of those societies accompany the membership application. One year's Society membership dues must accompany the application for membership.

3. **Reduced Application Fee.** The fee is \$5 for submission of an application for membership in the Society from an applicant who has not attained the age of 25 and is the son, grandson, brother, nephew or grandnephew of a member of the National Society, National Society Daughters of the American Revolution or Sons of the Revolution provided that the relative upon whose membership application is based, or if deceased, was at the time of the relative's death, a member in good standing in one of these societies. In this case, the application must follow the same lineage as in the relative's application. One year's Society membership dues must accompany the application for membership.

4. **Fee for Transfer of Membership in another State Society to the Society.** The fee is \$5 for transfer of a member of another state society to the Society. One year's Society membership dues must accompany an application for transfer unless the member transferring has paid dues to the other society to the end of the year of transfer. (A record copy of the member's application must be provided.)

5. **Fee for Application for Dual Membership in the Society and another State Society.** The fee is \$5 for an application for membership in the Society while maintaining membership in another state society. One year's Society membership dues must accompany an application for dual membership.

6. **Fee for Application for Supplemental Ancestor Certificate.** The fee is \$15 for submission of an application for a supplemental ancestor certificate. The fee is \$7.50 for each simultaneous submission of an application for a supplemental ancestor certificate submitted by additional family members provided that all such additional applications must follow the same lineage as the original application.

7. **Reinstatement Fee.** The fee is \$5 for an application to reinstate membership in the Society after a lapse in membership. One year's Society membership dues must accompany an application for reinstatement unless the reinstatement application is submitted before the end of the calendar year in which the membership terminated.

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Chapter 6 - Protocol of the North Carolina Society

Protocol in the North Carolina Society is governed by grace, dignity, courtesy and common sense, and as consistent with guidelines of the National Society.

A. Precedence

1. The National Society SAR is first, the North Carolina Society second, chapters third, and other patriotic and lineage organizations subsequent to chapters are ordered in precedence of their founding. Order of precedence in the SAR is as follows:

- a. National Society SAR President General
- b. DAR President General
- c. C.A.R. National President
- d. C.A.R. Senior National President
- e. National presiding officers of other hereditary societies in order of their founding
- f. Former Presidents General
- g. North Carolina SAR State President
- h. Presidents (Regent) of other hereditary societies in order of their founding
- i. National Vice President General, South Atlantic District
- j. National SAR officers in order of seniority
- k. National officers of other hereditary societies in order of their founding
- l. Visiting state society Presidents in order of entry into the Union
- m. State officers
- n. Chapter Presidents
- o. Chapter Presidents (Regents) of other hereditary societies in order of their founding.
- p. National Committee Chairmen
- q. State Committee Chairmen
- r. Chapter Committee Chairmen

2. PRECEDENCE NOT WITHSTANDING, the presiding officer of the host Society or Chapter is the ranking officer at a function.

3. The host may designate a guest of honor appropriate for a function without respect to precedence in the organization.

B. Recognition, Seating and Greetings

1. Persons are recognized and seated in order of precedence, with the presiding officer at the center place. The guest of honor, if any, is to the right of the presiding officer. After the guest of honor, guests will normally be seated in order of precedence.

2. Officers of other organizations bringing greetings will be called upon on order of precedence.

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C. Visits to Chapters by the North Carolina State President

1. The North Carolina Society President will attempt to visit one or more Chapters in every Region of the Society during his term in office. Such visits are normally contingent upon invitation from the host Chapter.
2. Chapters of the North Carolina Society will normally invite the North Carolina President to attend a function during the year as the guest of honor. This invitation should be made as soon as possible after the election of officers. The North Carolina President will normally speak at such event and the invitation should specify the nature of the speech or remarks that the Chapter desires.
3. When Chapters invite the North Carolina Society President to attend a function, whether or not as the guest of honor, the invitation should be in writing and should specify the nature of the function, place, time, dress, and the role expected of him. He has an obligation to accept or decline as early as possible.
4. When the North Carolina Society President is invited to a function at which there is a fee for admission, food, or similar charge, the Host Chapter is responsible for the cost to him and his wife, if she accompanies him. Whether the cost of others accompanying the North Carolina President shall be defrayed by the Host Chapter is at the discretion of that chapter.
5. If the North Carolina Society President is to attend a function, normally the formal part of that function should not begin until he arrives.
6. If a Chapter invites the President General or Vice President General of the South Atlantic District to a function, it should also invite the North Carolina Society President.

D. Flags

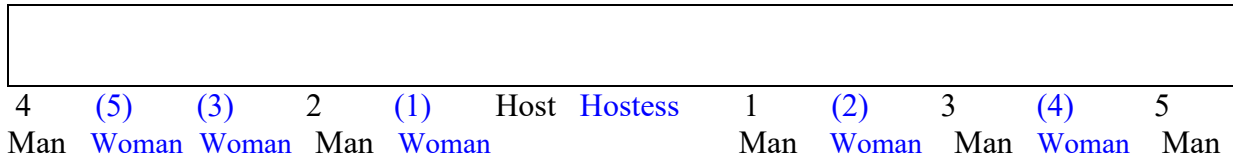
1. Flags on the podium, or elevated platform, will be displayed with the American Flag always to the speaker's right (audience left). Other flags will be displayed to the speaker's left of the American Flag, in the following order:
 - a. Foreign national flags
 - b. State Flags (North Carolina first, others in order of admission to the Union)
 - c. Military organizational flags in order of National Precedence
 - d. SAR flag
 - e. Flags of other societies (i.e., DAR, C.A.R.)
 - f. Flags of historic significance
 - g. Personal flags
2. Flags displayed behind the head table will be considered to be on a platform.
3. As with all protocol rules, discretion should always be used in displaying flags.

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Room shape, entrance door location, and other physical factors may require a different arrangement of flags than noted here. There are numerous guides available concerning etiquette in displaying the American Flag.

E. Seating

1. At mixed head tables, it is customary to alternate genders to the best extent possible. The spouse of a person seated in order of precedence will normally be seated next to the next person in the order. It is also customary not to seat a woman at the end of the table:



2. Seating arrangements will be adjusted in an appropriate fashion to accommodate any relevant handicaps of people being seated.

3. For State Society functions, the State Society President, as presiding officer, occupies the center place. The highest-ranking officer present is on the right, the next officer on the left, and so on alternating right and left.

4. A guide of precedence for a possible State Society function is as follows:

- (a) State Society President, (b) President General, (c) Governor of State or his Representative, (d) United States Senator, (e) United States Congressman, (f) Mayor of City, (g) Former Presidents General, (h) National SAR Officers in order of seniority, (i) Visiting State Society Presidents, (j) Active Host State Society Officers, (k) Former National Society Officers, (l) National Presidents of other organizations, (m) State Presidents of Other Societies.

F. North Carolina SAR Event Protocol – Step by Step

This explanation of the NC SAR Event Protocol is designed to help the new event planner get it right the first time around. It is also designed to provide updated information to members who may have been unaware of changes over the years. Protocol for events such as banquets is contained in the NC SAR Handbook, Volume I.

Events held in the North Carolina Society shall adhere to the following protocols. These are based on protocols established by the National Society Sons of the American Revolution.

National Society SAR President-General:

- 1. Should the National Society SAR President-General or his designated representative be in attendance at any event, the NC Society will assign a local representative to assist the President-General. North Carolina SAR pays for his lodging and meals and provides a wreath of real flowers for him to present, if applicable.

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2. He is escorted by the National Color Guard Commander or his designated representative.
3. He will be extended the proper protocol and respect.
4. He will be invited to speak and should not be upstaged by any other speakers.

Vice Presidents-General and other National Society SAR Officers:

1. Vice Presidents-General and other elected National Officers will be extended the proper protocol and respect.
2. They will be invited to speak and should not be upstaged by other speakers.

Note: Normally, no other General Officer will speak for the National Society if the President-General is present. Should another General Officer desire to speak, they will follow the Vice Presidents-General.

The basic rule at an event where the SAR is the sole host is the host chapter is always first to speak and first to present a wreath. After that, there is a set order for speakers to render honors (present wreaths).

Order for wreath presentations:

1. Host Chapter
2. Host State Officer or designated representative
3. National Officers
 - a. Sons of the American Revolution –
 - 1) The President-General or his designated representative
 - 2) The Host Vice President-General
 - 3) Remaining Vice Presidents-General
 - b. Other Patriotic Lineage Societies with precedence in the order by date of when they were organized.
 - 1) 1783 – Society of the Cincinnati
 - 2) 1876 – Sons of the Revolution
 - 3) 1890 – Daughters of the American Revolution
 - 4) 1892 – General Society of Colonial Wars
 - 5) 1895 – Children of the American Revolution
 - 6) 1896 – Order of Founders and Patriots
 - 7) 1897 – Mayflower Society
 - 8) 1915 - Colonial Dames XVII Century

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c. Should Patriotic Community organizations such as the Boy Scouts, Girls Scouts, American Legion, AMVETS or Veterans of Foreign Wars participate, their organization date will govern the order of their presentation.

- 1) 1899 – Veterans of Foreign Wars
- 2) 1910 – Boy Scouts
- 3) 1912 – Girls Scouts
- 4) 1919 – American Legion
- 5) 1944 - AMVETS

4. State Officers

a. Sons of the American Revolution - State Officers of remaining states in order of the state's admission to the Union (See Addendum 1)

b. Other Patriotic Lineage Societies with precedence in the order by date of when they were organized, then order of admission to the Union.

c. Patriot Community Organizations – in order of precedence

5. Chapters

a. Sons of the American Revolution

- 1) NC chapters in alphabetical order
- 2) Chapters from other states listed alphabetically by state's order of admission to the Union – see list below.

b. Other Patriotic Lineage Societies with precedence in the order by date of when they were organized, then order of admission to the Union

c. Patriot Community Organizations – in order of precedence

6. Sons of the American Revolution Ladies Auxiliary

7. Family Members

8. Government Officials

A recommended outline for the program is listed below:

Welcome
Invocation
Presentation of the Colors
Pledge of Allegiance
SAR Pledge
Organizational Greetings

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Keynote Speaker
 Presentation of Wreaths
 Closing Remarks
 SAR Recessional
 Retirement of the Colors
 Benediction
 Dismissal

Dates States Entered the Union

1	Delaware	December 7, 1787	26	Michigan	January 26, 1837
2	Pennsylvania	December 12, 1787	27	Florida	March 3, 1845
3	New Jersey	December 18, 1787	28	Texas	December 29, 1845
4	Georgia	January 2, 1788	29	Iowa	December 28, 1846
5	Connecticut	January 9, 1788	30	Wisconsin	May 29, 1848
6	Massachusetts	February 6, 1788	31	California	September 9, 1850
7	Maryland	April 28, 1788	32	Minnesota	May 11, 1858
8	South Carolina	May 23, 1788	33	Oregon	February 14, 1859
9	New Hampshire	June 21, 1788	34	Kansas	January 29, 1861
10	Virginia	June 25, 1788	35	West Virginia	June 20, 1863
11	New York	July 26, 1788	36	Nevada	October 31, 1864
12	North Carolina	November 21, 1789	37	Nebraska	March 1, 1867
13	Rhode Island	May 29, 1790	38	Colorado	August 1, 1876
14	Vermont	March 4, 1791	39	North Dakota	November 2, 1889
15	Kentucky	June 1, 1792	40	South Dakota	November 2, 1889
16	Tennessee	June 1, 1796	41	Montana	November 8, 1889
17	Ohio	March 1, 1803	42	Washington	November 11, 1889
18	Louisiana	April 30, 1812	43	Idaho	July 3, 1890
19	Indiana	December 11, 1816	44	Wyoming	July 10, 1890
20	Mississippi	December 10, 1817	45	Utah	January 4, 1896
21	Illinois	December 3, 1818	46	Oklahoma	November 16, 1907
22	Alabama	December 14, 1819	47	New Mexico	January 6, 1912
23	Maine	March 15, 1820	48	Arizona	February 14, 1912
24	Missouri	August 10, 1821	49	Alaska	January 3, 1959
25	Arkansas	June 15, 1836	50	Hawaii	August 21, 1959

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Flags

1. Flags displayed on the field will be displayed with the American Flag always to the speaker's right (audience left). Other flags will be displayed to the left of the American Flag, in the following order:

- a. Foreign national flags
- b. State Flags (North Carolina first, others in order of admission to the Union)

Note: Should the President General be present and the flag of his state is also present, his state flag will be flown to the left of the NC flag.

- c. Military organizational flags in order of National Precedence
- d. SAR flag

Note: From the speaker's right to left, NC SAR flag, visiting state SAR Flags (in order of admission), host chapter flag, remaining NC chapter flags in alphabetical order. Chapter flags from other states in order of admission in alphabetical order.

- e. Flags of other societies (i.e., DAR, C.A.R.)
- f. Flags of historic significance
- g. Personal flags – Flags of the President-General and State Society Presidents will be placed behind the podium, but not within the line of the other flags.

2. As with all protocol rules, discretion should always be used in displaying flags.

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Chapter 7 – Annual State Meeting

The date of the Annual Meeting of the Society is determined by Board per North Carolina Society Bylaws, Article IX, § 1 - Annual Meeting. The Annual Meeting is typically held on a Saturday in April to commemorate the April 12th date in 1776 when the Provincial Congress of North Carolina passed the Halifax Resolves. When extenuating circumstances occur or when it becomes financially beneficial to the membership, the Annual Meeting may be moved up into the month of March.

A centrally located site for the Annual Meeting will be determined and contracted for a five-year period. Regions with their respective chapters will rotate annually to host the Annual Meeting. The official Color Guard for the Annual Meeting shall consist of members of all North Carolina SAR Color Guards, shall be called the "Combined NC Color Guard" and conduct opening and closing ceremonies for each convention function.

The purpose of the Annual Meeting shall be:

- a. To provide a social atmosphere of fellowship for the members and their spouses
- b. To review the events and accomplishments of the past year.
- c. To approve the operating budget for the next year
- d. To conduct official business of the North Carolina Society.
- e. To elect officers
- f. To recognize significant accomplishments and present awards
- g. To announce the Society's goals and meetings, events, and programs for the upcoming year.
- h. To solicit inputs from the membership on training or other programs for the Board of Manager meetings

This is usually a two-day affair:

- a. Friday is for Registration, Council of Past State Presidents Meeting, South Atlantic District Meeting, Color Guard Presentation, and Social Hour.
- b. Saturday morning is a business breakfast with fundraising presentation followed by training sessions. Saturday noon is the youth recognition luncheon for Oration, Knights Essay, Eagle Scout, JROTC, and History Teacher representatives. Saturday afternoon is a Memorial Service followed by the Annual business meeting, election of officers, budget approval, bylaw amendments approval, and other business.
- c. Saturday evening is the Social Hour, Color Guard Presentation, Annual banquet followed by individual award presentations and Installation of Officers.

The President General and Vice President General South Atlantic District are normally invited and are requested to address the membership at the Annual Banquet.

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Each attending member is presented with the North Carolina Society's booklet which includes the program agenda and selective Officer and Committee Reports including Budget, Membership, Bylaws, and Nominating Reports.

A. Attendees

The number of invited guests will differ from year to year depending upon their availability and the number of non-SAR awards to be presented by the State President; however, the invitation list for the Annual State Meeting should include:

1. President General and his Lady
2. South Atlantic District Vice President General and his Lady
3. President of the Sons of the Revolution (SR)
4. Regent of the North Carolina Society Daughters of the American Revolution.
5. Local Chapter Regent of the DAR
6. Senior President of the North Carolina C.A.R.
7. President of the North Carolina C.A.R.
8. Mayor of host City
9. SAR Contest Winners: Eagle Scout, George & Stella Knight Essay Contest, JROTC Cadet, and the Rumbaugh Oration Contest and American History Teacher Contest winners.

B. Meeting Site

The State Annual Meeting Committee will choose a site for the meeting based upon the site's ability to provide suitable accommodations for overnight guests, reception, banquet facilities and meeting rooms. The venue should be centrally located in the state. The State Annual Meeting Committee and State Treasurer will contract a suitable accommodation for a five-year period.

C. Regional Host Responsibilities

The Host for the Annual Meeting will rotate among the five Regions. The chapters in the Region will collectively pull together the staffing and planning for the Annual Meeting in consultation with the State Annual Meeting Committee. The manning for the Annual Meeting will be from the chapters within the Host Region. Specific Host Region responsibilities include:

1. Establish a break-even budget (See D. Registration Rates below).
2. Provide visiting dignitaries with in-room flowers, fruit, candy or wine. (The cost is normally furnished by the Host Region; otherwise, it should be included in Registration Rates below.
3. Procure items for and assembly of conference swag bags.
4. Manning of the registration tables throughout the meeting.
5. Providing sufficient personnel to oversee the setup and readiness of meeting rooms.

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6. Provide personnel for checking tickets to the breakfast meeting, luncheon, and banquet.
7. Provide escorts for visiting dignitaries, special guests, and Youth award winners.
8. Arrangement for musicians and entertainment.

D. Registration Rates

The Annual Meeting Committee of the Host Region shall consult with the State Annual Meeting Committee in establishing a break-even budget according to the following guidelines:

1. Printing and postage costs for printed programs and supplies (i.e., name tags, place cards, etc.)
2. Flowers and decorations for tables.
3. Corsages for lady guests.
4. Hotel accommodations for special guests (i.e., President General or VPG & Lady).
5. Gift for President General.
6. Musicians and entertainment.
7. Transportation for Guest's Events
8. Favors
9. Speaker's Fees
10. Meals for student awardees and one adult (parent or chaperone).

The total cost should be divided by the number of SAR members estimated to attend and the registration fees set to fully absorb those costs.

D. Reception, Luncheon, and Banquet Rates

Fees charged for the President's Reception, the State Luncheon and the North Carolina State Banquet are based upon the total number of attendees conservatively estimated to attend (members & guests) multiplied by the total cost of the function, plus tax and gratuity divided by the number of SAR members paying for the function.

Example: 40 SAR Members and 10 Guests @ \$20.00*ea. = \$1,000.00

\$1,000.00 divided by 40 Members = \$25.00/per Member.

* Includes cost of meal, tax & gratuity.

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Chapter 8 – Establishing an Official State Event

A. General Information

The North Carolina Society follows the guidelines established by the NSSAR Historic Sites & Celebrations Committee for authorizing various events as Official National SAR Events. In that spirit of recognizing key events in North Carolina, the Society follows similar criteria and process for requesting and approving an Official State SAR Event. Elevating a chapter event to an Official State SAR Event places a shared long-term commitment upon the hosting/sponsoring chapter and the State with regards to planning, attendance, State officer participation, State Color Guard participation, financial obligations, and/or publicity. The complementary objective of this process is to generate a listing that outlines why these events have been so designated as well as to provide an example of what the Board of Managers will require to deliberate upon for any new proposals.

B. Key Definitions

Chapter event – Any local event or meeting performed by or participated in by the local chapter.

Sponsorship – The visible act of assuming responsibility or shared responsibility for leading the planning, organizing, resourcing, and execution of an event.

SAR sponsored event – An event where an SAR organization is the recognized leader/sponsor or co-sponsor of an organized activity.

Official State SAR Event – An SAR sponsored event that has met the criteria set forth below and whose written request by a chapter has been deliberated and approved by the Board of Managers.

C. Chapter Request for an Event to become an Official State Event

A chapter desiring to have their chapter event elevated to an Official State Event, must submit a written request to the Board of Managers (Board) via the Senior Vice President addressing the criteria below. The written request must be submitted at least 30 days prior to the next scheduled Board meeting or Annual Convention business meeting to allow time for distribution to the NC SAR leadership and for inclusion in the booklet. The written request must address the following criteria:

1. A recognized Revolutionary battle or event must have occurred at or near the planned event location.
2. Rationale for why it is important for the battle/event to be considered of state significance including its strategic impact on the Southern Campaign/American Revolution.
3. An established track record of an SAR chapter sponsored commemoration of the event over time.

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4. Evidence of participation by multiple SAR chapters/societies, and other organizations at the event.
5. Evidence that the event will be an ongoing event in the future years.
6. Any financial obligations or special responsibilities or liabilities associated with this event in which the SAR chapter and/or State could be committed.

The written request will be distributed to the NC SAR leadership and included in the booklet. The chapter will present their written request to the BOM under the title of New Business – Request for Official SAR State Event designation. The Board will then deliberate on the merits of the request and vote to approve or disapprove the request. If approved, then a version of the request will be incorporated into the NC SAR Handbook to serve as a historical record.

B. Chapter and State Responsibilities for an Official State SAR Event

The chapter will assume responsibility for:

1. Leading or co-leading the planning, organizing, resourcing, and execution of an event.
2. Posting the event on the NC SAR website Calendar.
3. Crafting and printing of the program. Current SAR Event Protocol will be used.
4. Requesting the State President or his designee to attend the event. (The State President is responsible for the speech in its entirety). Chapters shall request the State President/designee a minimum of 90 days prior to the event to decrease the possibility of a conflict of events.
5. Arrangement of the keynote speaker if the speaker is not the State President or his designee.
6. Crafting, transmitting, and receiving Registration forms and/or RSVPs including coordinating the list of organizations participating in the wreath laying ceremony, if applicable.
7. Notification of the Senior VP/State Awards Chairman of the projected number of Streamers. Minimum of 90-day notice required to ensure delivery of the requested streamers.
8. Arrangement of pre/post-event lunch options (i.e., Dutch treat) by the host chapter.
9. Arrangement or identification of hotel options for out-of-town participants.
10. Staffing the Registration table and a SAR recruiting table.
11. Coordinate with the State Color Guard Commander or Adjutant of the need for additional Color Guard members, flags, stand, ground spikes, and related equipment that the chapter cannot provide.
12. Advertise the upcoming event in the local newspaper, television, radio, and/or social media.
13. Ensure personnel are taking photographs or video of the event, then posting appropriate articles in public media as well as SAR website, social media, newsletters, and/or magazines.

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14. Post event, submitting a completed Event Report to the Americanism Committee Chairman and State Color Guard Commander within five (5) days after the event.

The State will assume responsibility to:

1. Fund and order the Event Streamers.
2. Designate a State Officer to attend the event if the State President cannot make the event.
3. The State President or designee will offer greetings from the NC Society.
4. The State President or designee will give the keynote address if requested.
5. The State President or his designee will render honors during the wreath laying ceremony (if applicable).
6. The State Color Guard Commander or Adjutant will command the Color Guard and provide any flags, stands, ground spikes, and related equipment that the chapter needs.

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Chapter 9 – Finances and Budget

A. Budget Process

1. The Treasurer under the guidance of the Executive Committee will develop, propose and implement a budget for the North Carolina Society. The yearly budget process is designed to allow membership participation, orderly planning, management oversight and will follow the guidance and schedule outlined below.
2. The North Carolina Society will use a fiscal year that runs from May 1st, through April 30th of the next year.
3. The North Carolina Society shall endeavor to operate on a balanced budget.
4. The North Carolina Society yearly budget process is as follows:
 - a. In the fall prior to the Winter Board of Managers meeting, the Treasurer shall solicit inputs to next year's budget.
 - b. The Treasurer will present a draft of next year's budget to the Executive Committee prior to the Winter Board of Managers Meeting.
 - c. The draft of next year's budget, with changes and corrections made by the Executive Committee, will be presented at the Winter Board of Managers meeting for review, comment and input. A vote to recommend the proposed budget, on condition that comments and adjustments will be made, for approval will be made at the Winter Board of Managers meeting.
 - d. The Treasurer will coordinate any necessary research and development of the FINAL version of the budget.
 - e. The Treasurer will present a FINAL version of NEXT year's budget, including comments and adjustments made as a result of the Winter Board of Managers Meeting, to the general membership at the Annual Meeting.
 - f. The Treasurer will present the FINAL version of NEXT Year's budget as recommended by the BOM to be voted upon for approval by the general membership.
5. Hard copies of the draft and final budgets will be available for review at the Board of Managers meeting and the Annual Meeting.

B. Annual Finance Review

1. The Finance Review Committee annually reviews the financial records of the Society as soon as possible after end of the Society's fiscal year.

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2. The Committee reports its findings to the Board at the first meeting of the Board after the completion of the review.

C. Financial Proposal Notification Process

1. During the year, NC Compatriots may propose other expenditures of funds that were not approved in the current budget and cannot wait until the next Annual Meeting. These expenditures are categorized as Off-Budget Expenditures. This process supplements NC SAR Bylaw Article X, § 4 on Off-Budget Expenditures. It allows the State Treasurer additional time (5 days) to perform and process a preliminary review of the proposal prior to release to the Board. The State Treasurer will determine if funds already exist in a current budget line item, recommend a different funding approach, or concur with the proposal. Additionally, the State Secretary needs two days to obtain and send the proposal to the Board at least ten days prior to the next scheduled Board meeting.

2. NC Compatriot desiring to submit an Off-Budget Expenditure Proposal shall complete the form. Email the completed form to the State Treasurer no later than 17 days from the start of the next scheduled Board meeting.

3. State Treasurer will conduct a preliminary review of the proposal and provide a recommendation. He will then email the proposal with his recommendation to the State Secretary as soon as possible but no later than 12 days prior to the next scheduled BOM meeting.

4. State Secretary will email a copy of the proposal to the Board as soon as possible but no later than 10 days prior to the next scheduled Board meeting.

5. State Secretary will notify the President and the Senior Vice President of the proposal to ensure it is added the agenda of the next scheduled Board meeting.

6. During the Board meeting, the Board will deliberate on the merits of the proposal and render a decision by majority vote to approve, disapprove, or defer the item for inclusion in the Budget at the next Annual Convention.

7. State Treasurer will retain the completed copy for his records.

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D. Off-Budget Expenditure Proposal form

Date Submitted: _____ Date of Board Meeting: _____

Proposal Submitter: _____ Chapter: _____

Email: _____ Phone: _____

Proposal Statement:

Estimated cost/expenditure: _____

Is this a one-time expenditure, short duration expenditure, or annual expenditure? _____

Does this expenditure satisfy a SAR requirement, goal, or program? Is so, please state.

Is this expenditure time-sensitive or can it be deferred to the next budget cycle?

State Treasurer Review

Does a budget line item currently exist from the proposed expenditure? Is so, describe.

Is there an alternative method or source to fund the expenditure that could be considered?

Are there any hidden costs? _____

Sufficient funds exist for this expenditure? _____

Recommendation: _____

Board Review

Date of Board Meeting: _____ Date Sent to Board: _____

Approved: _____ Disapproved: _____ Deferred: _____

Additional Remarks from the Board:

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Chapter 10 – Participation with the DAR and C.A.R.

A. Annual Participation with DAR

1. The Daughters of the American Revolution (DAR) Liaison manages relations between the Society and the North Carolina Society Daughters of the American Revolution (NCSDAR). In this capacity, he maintains contacts with appropriate state DAR officers and keeps them informed of all NC SAR events and commemorations of interest to the DAR.
2. The DAR Liaison invites and escorts the state DAR Regent and senior DAR officers to the Society Annual Meeting and other events as appropriate.
3. When the DAR brings the SAR new members, reward these women with the appropriate SAR medal (i.e., SAR Medal of Appreciation, Martha Washington Medal, and the Daughters of Liberty Medal). SAR applications must include a completed DAR Finder Report Form with that submission in order to qualify for credit. The DAR/SAR Membership Award was authorized in 1990 and is presented to the DAR State Society that recruits the most new members to the SAR. More information is available in Volume IV of the NSSAR Handbook.
4. The Society chapters should support and become involved in DAR activities such as:
 - a) Provide Color Guard support to DAR activities;
 - b) Reciprocate by recruiting new DAR members;
 - c) Collaborate in activities and programs at the local schools with the local DAR chapter;
 - d) Participate in Constitution Week activities;
 - e) Participate in U.S. Naturalization Ceremony with the DAR; and
 - f) Invite local DAR to Chapter grave markings.
5. Chapters of the Society should recognize deserving local DAR members and chapter regents with an appropriate award (i.e., SAR Medal of Appreciation, Martha Washington Medal, and the Daughters of Liberty Medal). For those DAR members who participate regularly in Color Guard events or commemorations, Chapters should recognize these ladies with a Molly Pitcher Medal or one of the 250th Anniversary Medals.

B. Annual Participation with C.A.R.

1. The Children of the American Revolution (C.A.R.) Liaison manages the relations between the Society and the North Carolina Society Children of the American Revolution (N.C.S.C.A.R.). He will:
 - a) maintain contact with appropriate state C.A.R. officers;

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- b) encourage chapters of the Society to support C.A.R. activities;
 - c) encourage chapters to award Bronze C.A.R. Medals of Appreciation Medals, where appropriate; and
 - d) encourage Society members to become involved with C.A.R. activities.
2. The C.A.R. Liaison works with local SAR Chapters to recruit male C.A.R. members to become members of the Sons of the American Revolution.
3. The C.A.R. Liaison will invite and escort the State President and Senior State President to attend the NC SAR Annual Meeting and deliver greetings during the Youth Awards Luncheon.
4. The C.A.R. Liaison will keep the State President and Senior State President informed of all NC SAR events and commemorations where C.A.R. attendance is beneficial.
5. Annually, the C.A.R. Liaison submits a completed C.A.R. Activity Streamer form to the NSSAR C.A.R. Liaison Committee for such activities as:
- a) Mentioning the C.A.R. in state newsletters - this can be as simple as a mention of C.A.R. members present at an SAR event;
 - b) At least one local chapter sponsoring a local C.A.R. society; and
 - c) Inviting C.A.R. members to participate in SAR events.
6. The Society President will normally be invited to attend the N.C.S.C.A.R. Annual Conference. At this Annual Conference, the Society President will:
- a) Bring greetings from the Society.
 - b) Present a \$1000 check to the N.C.S.C.A.R. State President to use for their annual service project and for N.C.S.C.A.R. operations.
 - c) Present the Silver C.A.R. Medal of Appreciation to the outgoing State President.
 - d) Every other year, present the Silver C.A.R. Medal of Appreciation to the outgoing Senior State President.
7. The State Color Guard may also be invited to provide an opening flag ceremony for the Annual Conference. They may be asked to provide uniformed escorts for their Debutantes if scheduled on their program.

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Chapter 11 – Medals and Awards

A. General Information

This section is a synopsis only. For more complete information, consult the National Handbook, Volume V, which is found on the National Society web site.

1. Wear - Medals can be offered in the large or miniature size. The miniatures are normally worn with formal wear. All medals are worn on the left breast with the top of the ribbon clasp four (4) inches below the midpoint of the shoulder seam of the coat. They may be pinned separately or attached to a bar for neatness and may overlap no more than 50% between rows. Display of more than three rows is strongly discouraged. Members should consult the official handbook of the National Society for proper order of wear. The Society's policy is that medals and pins will not be worn on Revolutionary War uniforms, militia outfits, or colonial attire.
2. Presentation - All awards are presented in the name of the National Society, SAR. The presentation should be made publicly and with appropriate ceremony befitting the dignity and honor of the occasion. Medals should be presented in person with the recipient on hand. For Extenuating circumstances, such as illness, a representative may receive the medal. Medals should never be mailed.
3. Adults - All SAR medals, with the exception of the Medal for Heroism, ROTC/JROTC medals, the Bronze Good Citizenship Medal, and the youth contest recognition medals are awarded only to adults.
4. Resale - Members should be aware that by becoming SAR members they have given the SAR legal authority to prevent improper transfers of SAR insignia, and they are requested to guard against insignia being available in resale shops, antique shops and so forth. Every effort should be made to redeem them to the society. They further agree, on behalf of themselves, their heirs, executors, administrators, and any and all persons asserting claims through them, to give the SAR a right of first purchase of their SAR Badge or other regalia.
5. Medals that can be received more than once - A member may be awarded several National Society medals more than once: Meritorious Service Medal (only once at each level), Roger Sherman Medal (only once at each level), Medal for Heroism, Bronze Good Citizenship Medal, Liberty Medal, C.A.R.-SAR Medals of Appreciation, Samuel Adams Congress Planning Medal, Service to Veterans Medal, and the Florence Kendall Award.

Oak Leaf Clusters (OLCs) – Are worn on the medal drape for multiple awards of the same medal and are awarded for additional, separate, and distinct acts of service:
Bronze – is worn for each additional award up to 5 additional awards;
Silver – is worn in lieu of each set of 5 bronze Oak Leaf Clusters, up to a maximum of 2 silver;
Gold – is worn in lieu of 2 silver clusters.

B. Color Guard Medals (See National SAR Color Guard Handbook)

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Medals will be awarded when the compatriot achieves the requirements established by the National Color Guard manual. Chapters will normally award the Bronze Color Guard medal and advise the state color guard commander of the date of the presentation. The State Color Guard Commander or Adjutant may be invited to make the formal presentation if requested by the chapter commander.

The Silver and von Steuben Color Guard medals will be recommended by the state color guard commander to the National Color Guard commander for presentation of the medals at a National, District or State meeting using the criterion established by the National Color Guard manual.

The National Von Steuben Medal for Sustained Achievement in the National Society SAR Color Guard, authorized 2 March 2012 by the National Society SAR Executive Committee, may be awarded for sustained service to the Society as a Color Guardsman at the National or District Levels. Recipients must already have been awarded the Bronze and Silver Color Guard Medals and a Color Guardsman must serve at least five years after he has received the SAR Silver Color Guard Medal.

The Silver Color Guard Medal is for service at the District and National levels. The medal is awarded for at least three years of service at the applicable level. The three years may be broken, not continuous. Award of each medal may be for retroactive service, so that any living compatriot may receive it, even if he cannot march anymore. *An SAR Color Guardsman must have the Bronze Color Guard Medal before he can be awarded the Silver Color Guard Medal.*

The Bronze Color Guard Medal is for service at the State and/or Chapter levels. Each medal is awarded for at least three years of service at the applicable level. The three years may be broken, not continuous. Award of each medal may be for retroactive service, so that any living compatriot may receive it, even if he cannot march anymore.

C. Streamer Awards

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

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

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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)
- Medium Chapter (41-90 members)
- Large Chapter (91-150 members)
- Very Large Chapter (151 or more members)

New Membership Growth North Carolina SAR - First Place & Honorable Mention Ribbons Awards will be presented to chapters who enroll the most new members.

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

Membership Retention Greater than 95% - Streamers will also be presented to chapters with a retention rate of 95% or higher for the calendar year.

Hard Copy History/Scrapbook/Yearbook – First Place and Honorable Mention Entries deemed to be the best by a panel of three judges from the Awards Committee whose Chapter does not have an entry in either of these categories. If there is a shortage of judges in this category, additional judges shall be chosen from the general membership.

Electronic Scrapbook/Yearbook - First Place and Honorable Mention - First Place & Runner-up Ribbon Awards will be presented to Chapters who present entries deemed to be the best by a panel of three judges from the Awards Committee whose Chapter does not have an entry in either of these categories. If there is a shortage of judges in this category, additional judges shall be chosen from the general membership.

Flag Certificate Streamer - This streamer is presented to chapters who award 10 or more SAR Flag or Flag Retirement Certificates to individuals/companies/organizations who correctly fly the U.S. flag during the calendar year (See Americanism & Flag Committee).

USS Stark Memorial Streamer Award – This streamer will be presented to the chapters which demonstrate the highest support of veterans through completion and submission of the USS Stark Memorial Award.

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

D. Individual Awards

For more complete information, consult the National Society SAR Handbook, Volume V, which is found on the National web site.

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1. Medals Awarded by a State Society

Patriot Medal

The Patriot Medal is the highest award presented to a Compatriot by the North Carolina Society and recognizes long, faithful, outstanding, and distinguished service at the state and/or chapter level. Service at the national level is not considered in making the award. It is desirable that it be presented at the annual meeting of the state society. A representative cannot accept the Patriot Medal. All requirements should be thoroughly reviewed before requesting this medal. The Executive Director maintains a record of all past recipients so that societies may contact him in advance to determine if a person has already received the medal and thus avoid an invalid request. See Appendix A-North Carolina Award Recipients.

State Medal of Distinguished Service (Awarded by State Society President)

The Distinguished Service Medal, the highest honor awarded by the State President, may be awarded for long and conspicuous service to State Society. Only one medal may be awarded per year by the State President. A citation of award is filed with the National Society for this medal. See Appendix A-North Carolina Award Recipients.

State Meritorious Service Medal

The State Meritorious Service Medal may be awarded to SAR members who have rendered long, faithful and meritorious service to their state society. The meritorious service rendered should be stated in the citation.

Silver Roger Sherman Medal

The Silver Roger Sherman Medal may be awarded to a compatriot in recognition of, and in appreciation of, outstanding services rendered to a State Society. The medal is presented to a compatriot for significant service which lacks the requirements for the Meritorious Service Medal. It should be awarded in place of the Bronze and Silver Good Citizenship Medals, which cannot be awarded for service to the SAR. The recipient must have served as an active officer for a minimum of two years, as an active committee chairman for three years, or as an active member of a committee for four years.

This Medal is named after Roger Sherman (1721-1793), who was a founding father, and the only person to sign all four great state papers of the U.S.: the Continental Association, the Declaration of Independence, the Articles of Confederation and the Constitution.

Silver Children of the American Revolution-Sons of the American Revolution Medal of Appreciation

The State Society may present the Silver C.A.R.-SAR Medal of Appreciation to a member of the C.A.R. or SAR in good standing in recognition of and in appreciation for outstanding services

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rendered to a State C.A.R. Society. The award may also recognize outstanding C.A.R. Senior leaders of a State Society or SAR members who have significantly supported or served a State C.A.R. Society. See Appendix A - North Carolina Award Recipients.

2. Medals Awarded by a Chapter

Chapter Medal of Distinguished Service

The incumbent Chapter President may present one medal during his term (or each year of his term if elected to a multiyear term) at the Chapter's Annual Meeting, to a Compatriot in recognition for that Compatriot's conspicuous service to the Chapter during the president's administration. The Chapter President presents this Medal at his discretion; no other approval is required.

Chapter Meritorious Service Medal

The Chapter Meritorious Service Medal may be awarded to SAR members who have rendered long, faithful and meritorious service to their chapter. The meritorious service rendered should be stated in the citation.

Bronze Children of the American Revolution-Sons of the American Revolution Medal of Appreciation

A local Chapter may present the Bronze C.A.R-SAR Medal of Appreciation to a member of the C.A.R. or SAR in good standing in recognition of and in appreciation for outstanding services rendered to a local C.A.R. Society. The award may recognize assistance in promoting C.A.R. members that qualify to obtain SAR memberships, C.A.R. members who participate in the State Society Annual Meetings or at the National Congress, C.A.R. members who have otherwise significantly aided SAR programs, or SAR members and C.A.R. Senior Leaders who have supported or served a state or local C.A.R. Society. See Paragraph G-North Carolina Award Recipients.

Bronze Roger Sherman Medal

The Bronze Roger Sherman Medal may be awarded to a compatriot in recognition of, and in appreciation of, outstanding services rendered to a Chapter. The medal is presented to a compatriot for significant service which lacks the requirements for the Meritorious Service Medal. It should be awarded in place of the Bronze and Silver Good Citizenship Medals, which cannot be awarded for service to the SAR. The recipient must have served as an active officer for a minimum of two years, as an active committee chairman for three years, or as an active member of a committee for four years.

This Medal is named after Roger Sherman (1721-1793), who was a founding father, and the only person to sign all four great state papers of the U.S.: the Continental Association, the Declaration of Independence, the Articles of Confederation, and the Constitution.

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3. Medals Awarded by a State or Chapter

Gold Good Citizenship Medal

The Gold Good Citizenship Medal is awarded for outstanding and unusual patriotic achievement and service of national importance to persons of prominence on a national level in the areas of government (including military service), religion, education, business and other professions, and other fields of endeavor. The State Society may award up to two Gold Good Citizenship Medals per year. The Gold Good Citizenship Medal must be approved by the National Society's Medals and Awards Committee and Executive Committee. Nominations for the award can be made by the National Society, a state society, or by a chapter (only if approved by its state society). All nominations should be submitted on the standard Gold Good Citizenship application form. There is no requirement that persons must be awarded a Bronze or Silver Good Citizenship Medal before they may be awarded a Gold Good Citizenship Medal.

Silver Good Citizenship Medal

The Silver Good Citizenship Medal recognizes outstanding and unusual patriotic achievement and service that is of a more local degree (state or regional level) than required for the Gold Good Citizenship Medal. The medal is presented to persons of prominence in the areas of government (including military service), religion, education, business and other professions, and other fields of endeavor. Since it recognizes extensive service, a biographical sketch of the candidate should accompany the request for a medal. There is no requirement that persons must be awarded a Bronze Good Citizenship Medal before they may be awarded a Silver Good Citizenship Medal.

For the SAR member who has shown leadership in six capacities including: Church, School, Scouting, Fraternal, Business Associations, Government, Patriotic, Military, Veterans, Conservation, Hereditary, Genealogical, Historical or Organized Sports (Little League, etc.). For a non-member, service should be of a truly outstanding nature. This award does not require prior award of the Bronze Good Citizenship Medal.

Bronze Good Citizenship Medal

This is a multipurpose medal that can be awarded to both youth and adults for noteworthy achievements in school, community or state. For an SAR member who has served in at least four of the leadership capacities covered under the Silver Good Citizenship Medal.

Wounded Warrior Coin

The Wounded Warrior Coin and Certificate can be presented to any member of the U.S. Military injured in the line of duty. SAR membership is not required for presentation.

Outstanding Citizenship Award Lapel Pin

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A chapter, state society or the National Society may present the lapel pin to deserving students in recognition of high ideals of character and citizenship. The Outstanding Citizenship Certificate may also be given in conjunction with the lapel pin.

Certificate of Appreciation

The Certificate of Appreciation, authorized in 1987, is a multi-purpose certificate of the same quality as other certificates with the SAR logo at the top and the seal at the bottom, both in color. The wording is as follows: "_____ has been awarded the Certificate of Appreciation in recognition of outstanding support given to the Sons of the American Revolution." It has printed spaces for the president and secretary to sign, for the date, and the name of the National Society, district, state or chapter.

The certificate can be used by any SAR organization for recognition of service by members, speakers, and for any other persons that may provide services and support to the SAR.

Flag Certificate

The Flag Certificate is awarded to individuals, companies, and government agencies that properly display of the American Flag for patriotic purposes.

U.S. Flag Retirement Certificate

The Certificate for U.S. Flag Retirement, authorized in 2018, is presented to any individual (including Compatriots) or organization that participates in the collection and destruction of worn, soiled, or otherwise unserviceable U.S. Flags. A chapter or state can present it.

E. Medals Authorized for Special Occasions and Commemorative Events

Semiquincentennial (250th Anniversary) Recognition Award

The medals are designed to encourage and recognize those compatriots, chapters and societies to participate in local, state, national and international events which publicly educate, and recognize, honor, and celebrate the heroes of the American Revolution. Participation involves the planning and execution of these events, as well as attendance. The medal covers the celebration of any event's 250th anniversary where said event related directly to acts of resistance to British attempts to coerce the residents in America: from the first Parliamentary Acts protested after the conclusion of the French and Indian Wars, through the armed struggle of the American War for Independence, to the ratification of the Treaty of Paris by the Continental Congress. This therefore will cover any public celebrations in the period from 2014 to 2033.

F. Medals and Awards for Service to the SAR

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For more complete information, consult the National Society SAR Handbook, Volume V, which is found on the National web site.

SAR Daughters of Liberty Medal

The Daughters of Liberty Medal may be presented to a lady recommended by any officer of a chapter, state or National Society, SAR in appreciation for her unselfish devotion, tireless efforts and assistance to the SAR, and who has dedicated her time, energy, ability and/or finances to the organization in support and furtherance of the stated objectives of the National Society, SAR. This is the highest lady's medal and consideration in awarding this medal should be given only after the SAR Medal of Appreciation or the Martha Washington Medal has been presented. See Paragraph G- North Carolina Award Recipients.

SAR Medal of Appreciation

The SAR Medal of Appreciation may be presented to a member of the DAR in good standing in recognition of and in appreciation for outstanding services rendered to the SAR. The award may recognize assistance in forming new SAR chapters, obtaining a specific number of new SAR members or otherwise significantly aiding the SAR programs. It is awarded to a DAR for assistance in forming new chapters. It is awarded to the State DAR Regent once in her three year term. To acknowledge contributions made by DAR members as well as women who are non-members for service rendered, and also to a DAR for providing three (3) new SAR members. See Appendix A-North Carolina Award Recipients.

Martha Washington Medal

The Martha Washington Medal may be presented to a woman over 18 years of age in recognition of outstanding service to SAR. A DAR may receive the Martha Washington Medal and the SAR Medal of Appreciation (on separate occasions) if her service warrants it. It is usually presented to the hostess of the Annual State Convention, and also to a DAR for providing five (5) new SAR members. See Appendix A-North Carolina Award Recipients.

Lydia Darragh Medal

The Lydia Darragh Medal may be awarded by the incumbent President General, Vice President General, State Society President or Chapter President to the lady who has provided significant service to him during his term. The medal will recognize the assistance of the ladies who work behind the scenes supporting SAR programs, but whose service does not meet the requirements for the Martha Washington Medal. It may only be presented once per year at the discretion of the President General, a Vice President General, State Society President or Chapter President. The medal should be presented at the annual society by the outgoing President General, Vice President General, State Society President or Chapter President, and the service citation should be read at the time of presentation. First Issue 2013: *Retroactive Effectiveness*: Former presidents general, vice presidents general, state society presidents, and chapter presidents who have not made a presentation of this award would be eligible to present the medal to a lady upon the presentation of a letter to the incumbent President General, Vice President General, State

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Society President or Chapter President describing the assistance provided by the lady. See Appendix A-North Carolina Award Recipients.

Molly Pitcher Medal

Many women who are the wives, daughters, sisters, girlfriends, and other female relatives and companions of SAR Color Guardsmen routinely and with great dedication support their SAR Color Guardsman and the SAR Color Guard. The Molly Pitcher Medal may be awarded to women who have supported the SAR Color Guard at the State, District and National Levels. See Appendix A-North Carolina Award Recipients.

Silver Good Citizenship Medal

The Silver Good Citizenship Medal recognizes outstanding and unusual patriotic achievement and service that is of a more local degree (state or regional level) than required for the Gold Good Citizenship Medal. The medal is presented to persons of prominence in the areas of government (including military service), religion, education, business and other professions, and other fields of endeavor. Since it recognizes extensive service, a biographical sketch of the candidate should accompany the request for a medal. There is no requirement that persons must be awarded a Bronze Good Citizenship Medal before they may be awarded a Silver Good Citizenship Medal.

Compatriot Service Requirements: In order to have uniform criteria, the requirement has been established that the member shall have served in six leadership capacities in any of the following local organizations: Church, School, Scouting, Fraternal, Business Associations, Government, Patriotic, Military, Veterans, Conservation, Hereditary, Genealogical, Historical or organized Sports (Little League, etc.).

Non-member Service Requirements: In the case of a non-member, the National Society or a state society determines the qualifications.

Bronze Good Citizenship Medal

The Bronze Good Citizenship Medal recognizes persons whose achievements are noteworthy in their school, community or state. It can be presented to both adults and minors. It is a multi-purpose award serving many functions. The medal was originally designed as a medallion, but a ribbon and clasp were added in 1932 to convert it to a medal.

Non-member Service Requirements: The following are some of the criteria for the award:

1. Persons who have made important contributions that are not as significant as those qualified for the Silver Good Citizenship Medal.
2. The outstanding high school student in his/her school considering both citizenship and scholarship. The exact criteria is at the discretion of the presenting authority, i.e., it could be presented to a senior or junior, for overall scholarship and citizenship; or to a student with the highest grades in history and the best record in citizenship, etc.

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3. This medal is authorized for presentation to the US Navy Sea Cadet Corps, to an Outstanding Cadet nominated by his/her Commanding Officer. The award is in recognition of the cadet's leadership, military bearing and excellence of character, scholarship, and citizenship.

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G. Youth and C.A.R. Medals and Awards

For more complete information, consult the National Society SAR Handbook, Volume V, which is found on the National web site.

Bronze Good Citizenship

The State Society normally awards the Bronze Good Citizenship Medal to the State President of the C.A.R. If a North Carolinian becomes National C.A.R. President and eighteen years of age or older, the State Society may award him (or her) the Silver Good Citizenship Medal.

Silver C.A.R.-SAR Medal of Appreciation

Awarded by the State or National Society only and is awarded for services to the C.A.R. upon recommendation of the President of a C.A.R. Chapter, State or National Society. See Appendix A-North Carolina Award Recipients.

Bronze C.A.R.-SAR Medal of Appreciation

For C.A.R. members who participate in State SAR Annual Meetings and events or who have otherwise significantly aided SAR programs or membership. See Appendix A-North Carolina Award Recipients.

Outstanding Citizenship Award Lapel Pin

This award may be presented to deserving students in recognition of high ideals of character and citizenship. A certificate may also be given with the pin.

Arthur M. King Eagle Scout Scholarship, Medal and Trophy

This award is for the winner of the Outstanding Eagle Scout contest. The Bronze trophy is awarded by the State level, and the Medal is awarded at the Chapter level. The State award also includes a certificate and a scholarship. See Appendix A-North Carolina Award Recipients and Appendix C – Table of State Youth Awards.

Silver ROTC Medal (Awarded by a Chapter)

Is awarded annually to a college level ROTC program for the outstanding ROTC cadet based on leadership qualities, military bearing and general excellence. The medal and certificate are provided to the cadet in person by a chapter member.

Bronze JROTC Medal (Awarded by a Chapter)

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This is awarded to students enrolled in a JROTC program at the high school level. These medals are only awarded if a SAR member is present to make the award.

Enhanced JROTC Cadet Award

The National SAR award is to be presented to the Outstanding Cadet in their next to last year of JROTC (a Third Year Cadet [11th grade] in a four-year program). For a two-year JROTC program, a Second Year Cadet may be selected. Whenever possible, presentation will be made by a member of the SAR at the unit's Spring Awards program.

The Enhanced JROTC Cadet program has several objectives; the first objective is to identify and recognize Outstanding JROTC Cadets at the Chapter, State Society, and National Society levels. The program has been designed to allow all candidates to be evaluated equally, regardless of the Military Service they represent. The state medal and corresponding certificate and scholarship are awarded at the Youth Luncheon during the North Carolina SAR Annual Meeting. See Appendix A-North Carolina Award Recipients and Appendix C – Table of State Youth Awards.

Rumbaugh Orations Medal

This medal comes in two forms, one for the Chapter and one for the State. The State competition winner is also given a scholarship. If the State orations contestant advances to the National competition, further assistance may be offered toward travel expenses to attend the National Congress. See Appendix A-North Carolina Award Recipients and Appendix C – Table of State Youth Awards.

Youth Video Medal

This medal comes in two forms, one for the Chapter and one for the State. The State competition winner is also given a scholarship. If the State Video contestant wins the National competition, further assistance may be offered toward travel expenses to attend the National Congress. See Appendix A-North Carolina Award Recipients and Appendix C – Table of State Youth Awards.

George & Stella Knight Essay Medal

This medal comes in two forms, one for the Chapter and one for the State. The State competition winner is also given a scholarship. See Appendix A-North Carolina Award Recipients and Appendix C – Table of State Youth Awards.

Americanism Poster Contest Award

The Chapter and State winners should receive a certificate of appreciation, and the winner of the State Competition receives a scholarship from the North Carolina SAR. In addition, the teacher of the winner of the poster contest is awarded a scholarship. See Appendix A-North Carolina Award Recipients and Appendix C – Table of State Youth Awards.

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Americanism SGT Moses Adams Brochure Contest Award

The Chapter and State winners should receive a certificate of appreciation, and the winner of the State Competition receives a scholarship from the North Carolina SAR. In addition, the teacher of the winner of the poster contest is awarded a scholarship. See Appendix A-North Carolina Award Recipients and Appendix C – Table of State Youth Awards.

Dr. Tom and Betty Lawrence American History Teacher Award for Elementary, Middle and High School

The Dr. Tom & Betty Lawrence American History Teacher Award seeks educators at the elementary, middle or high school level at a recognized public, private, or parochial institution. Teachers complete the required application and submit a written essay of not less than 500 words discussing the importance of teaching the American Revolutionary era. The essay may also describe any extraordinary teaching techniques or innovative projects utilized by the teacher to teach the American Revolution. The State winner is awarded a Bronze Good Citizenship Medal and a cash award See Appendix A-North Carolina Award Recipients and Appendix C – Table of State Youth Awards.

H. Service Awards

For more complete information, consult the National Handbook, Volume V, which is found on the National web site.

Gold Good Citizenship Medal (To member or non-member, by State and National only)

For outstanding and unusual patriotic achievement and service of National Importance. It may only be presented by the State Society with the approval of the National Society SAR Executive Director. A state can only award two (2) Gold Good Citizenship Medals per year. It can be awarded to a non-member.

War Service Medal

The War Service Medal was first authorized in 1899 for members who served in the Spanish-American War. It was subsequently authorized for members who served in World War I and World War II. Following World War II, the National Society SAR authorized a generic War Service Medal with specific service periods indicated by bronze bars. The Compatriot must have:

1. Served, or is serving, honorably in:
 - a. the armed forces of the United States,
 - b. the military forces of a country allied with the United States, or
 - c. a United Nations Peace Keeping Force; and
2. Served against a common enemy in a war or action recognized by a branch of the Armed Forces of the United States; and
3. Received a campaign medal, combat ribbon or badge as shown on the DD-214 form (or equivalent).

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Military Service Medal

The Military Service Medal, authorized in 2006, may be presented to a Compatriot in recognition of military service which does not otherwise qualify for the War Service Medal.

Medal for Heroism

It recognizes outstanding bravery and self-sacrifice in the face of imminent danger, i.e., acts which involve great personal courage and risk to the recipient. It is intended primarily for acts by civilians not in uniform but does not exclude police, firemen, and SAR members. It is not intended to recognize acts that would have been covered by armed forces medals for valor. The medal may also be presented posthumously. Notice of award should be sent to National by May 1st of each year. See Appendix A-North Carolina Award Recipients.

Law Enforcement Commendation Medal

The Law Enforcement Commendation Medal is presented to those who have served with distinction and devotion in the field of law enforcement. The medal is intended to recognize exceptional service or accomplishment in the field of law enforcement. Eligibility is not limited to peace officers but extends to the entire range of persons who make and enforce the law to include but not limited to peace officers, attorneys, judges, prosecutors and legislators who have performed an exceptional act or service beyond that normally expected. The medal may be presented posthumously. Names of recipients should be forwarded to National for listing by May 1st of each year. See Appendix A-North Carolina Award Recipients.

Fire Safety Commendation Medal

The Fire Safety Commendation Medal is presented to an individual for accomplishments and/or outstanding contributions in an area of fire safety and service. The award is not limited to firefighters. It may be presented to recognize a variety of fire safety and service that has evolved into a highly technical and skilled profession with constant study, development and involvement by numerous dedicated citizens with a single goal - protect human life and property by preventing injuries or casualties due to fire and chemicals. The medal may be presented posthumously. Names of recipients should be forwarded to National for listing by May 1st of each year. See Appendix A-North Carolina Award Recipients.

Emergency Medical Services Commendation Medal

The Emergency Medical Services Commendation Medal is presented to an individual for accomplishments and/or outstanding contribution in an area of emergency medical services. The award is intended for paramedics and certified Emergency Medical Technicians and others in the emergency medical field who have performed an act or service beyond that normally expected. The medal may be presented posthumously. Names of recipients should be forwarded to National for listing by May 1st of each year. See Appendix A-North Carolina Award Recipients.

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Robert E. Burt Boy Scout Volunteer Award Medal

The Robert E. Burt Boy Scout Volunteer Award is a BSA-recognized Community Organization Award presented to members of the SAR in good standing who have displayed outstanding dedication to the Scouting Program. Award criteria are based on work accomplishment and dedication rather than specific length of service time. The medal is awarded by the National Society of the Sons of the American Revolution upon nomination by a state society.

General William C. Westmoreland Award

This award is presented to the SAR member who has the most outstanding record of service as a VA Volunteer donating time to veterans in the VA hospital. It is presented to only one person per year as selected by the NSSAR Veterans Committee.

Service to Veterans Medal

The Service to Veterans Medal may be awarded to SAR members who have given long and exemplary service to veterans. The medal is awarded for 5000 USS Stark Award points accrued by the SAR member. The medal will be awarded at the Chapter (or State) level following the Chapter Veteran Committee Chairman's (or State Veteran Committee Chairman, as necessary) approval of the member's documentation. Documented points will be accumulated and held locally at the Chapter (or State in unusual cases) for the member seeking to qualify for this award. The cost of this award will be paid by the awarding entity.

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SAR Membership Service Awards

The SAR member may purchase or be awarded lapel pins or the corresponding tie tac style pin with certificate for their years of service in the following categories: 5 year, 10 year, 15 year, 20 year, 25 year, 30 year, 35 year, 40 year, 45 year, 50 year, 55 year, 60 year, 65 year, C.A.R. member, Eagle Scout, and Life Member.

I. Recognition for Monetary Donations

Donations to the North Carolina Society

Donations can be designated or not designated and are used to cover the cost of our programs and outreach. Funds left over will be used to enhance the endowment for the North Carolina SAR. Recognition of donor is provided in the following manner:

- \$100 - \$249 – Certificate of Appreciation
- \$250 – \$499 – Certificate and silver lapel pin
- \$500 and above – Certificate and gold lapel pin

Friends of the SAR Library

SAR members are recognized for donations to and membership in the National Friends of the Library. The library collection has grown to over 58,000 items and includes family histories, genealogical materials, federal census, Revolutionary War pension applications, and a variety of books and CD collections. Levels of giving include donated items as well as cash:

- \$25.00/year – Individual Member
- \$50.00/year – Family Membership
- \$100.00 – Patron
- \$500.00 - Jefferson Club

George Washington Endowment Fund

This fund supports National Society SAR programs for the youth and other events and programs that are part of our outreach mission. Recognition of the donor requires a donation of \$1,000 and the recipient receives a gold lapel pin and certificate and is designated a George Washington Fellow, and member of the SAR \$1,000 club.

North Carolina George Washington Fellow (\$1,000)

When contributions from compatriots across the state reach \$1,000 or increments thereof, the chapter presidents will convene at the Annual Meeting to recognize a state compatriot as a George Washington Fellow. See Appendix A-North Carolina Award Recipients.

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Center for Advancing America's Heritage (CAAH) and National Society SAR Endowment

The National Society started a major 10-million-dollar initiative to construct a new headquarters and outreach education center in the year 2000. The move from our former offices at 1,000 South Fourth St., on the outskirts of Louisville, to the more visible location 803-809 West Main Street in the Louisville Museum District occurred in July 2014. The new location is next to the Frazier Arms Museum and the Louisville Slugger Factory and Museum. The move was necessary because we simply ran out of room after 30 years at our former location. The new facility will house our national offices, genealogical library, museum galleries, outreach education center and gift shop. The new facility will be a big boost to our existing outreach education efforts allowing far greater visitation by school groups and the general public.

As Executive Director Joe Harris said, "The Center will promote the understanding of the Revolutionary War period, including its people, places, events and memorials through educational outreach programs and curricula via the Internet, printed material and presentations using both live and recorded media. The Center's museum and library will become a premiere repository of documents and artifacts of the Revolutionary War period."

At the end of 2014, funds raised for the Center were approximately 11 million dollars. The sale of the former headquarters provided about 2.0 million dollars which has been invested in the Fifth Street Foundation. Fundraising continues on several fronts to provide enough funds to finish construction and endow the CAAH.

North Carolina has done very well in raising support for the CAAH, and we would like to continue this effort. As of December 2014, The North Carolina SAR achieved a 24% level of giving from our membership at an average of \$318 per member.

Donors to the CAAH are recognized in the following manner:

Membership in the SAR 1,000 Society for accumulated gifts of \$1,000 or more.

Major gifts - Naming opportunities are available for gift of over \$10,000

Donor Benefits and Recognition Levels

\$25.00 Car/Refrigerator magnet

\$148 (silver) and \$296 (gold) Sons of Liberty lapel pin

\$592 Delegate level lapel pin

\$1,184 Drafter level lapel pin

\$1,776 Signer level lapel pin

\$5,328 Bronze level wall mounted quill with name engraved

\$8,880 Silver level wall mounted quill with name engraved

\$17,760 Gold level wall mounted quill with name engraved

\$592 Chapter Society Streamer

\$1,184 State Society Streamer

\$10,000 and above bequest will qualify donor for the SAR Founders Circle, our SAR Legacy Society