

Compatriots:

The goals for my term as State President were published on May 6, 2021 via a special edition of the California Compatriot. I am pleased with the amount of progress made towards completion of the long-term goals, and the high percentage of completion of the short-term goals. I am excited to provide this updated progress report and extend my sincere thanks to the many Chapter and State Officers whose hard work helped us obtain these results.

### **Short-term:**

#### **1. Have Fun**

- a. Laugh with and support each other and our Chapters
  - b. Remember this is a volunteer organization
- On-going; You be the judge.

#### **2. Chapter Visits**

- a. Personal contact and two-way communications
- b. Current information for Chapter Officers and meeting dates/locations

The CASSAR Officers have been actively attending Chapter meetings across the state and the Chapter section of the website has been updated with the most current information reported by the Chapters.

#### **3. Position Training**

- a. Chapter and State Officers

The State Secretary has been conducting monthly zoom meetings/training sessions with Chapter Secretaries and attendance has been higher than expected. Our former state Treasurer has posted all the forms and a primer on their completion on the CASSAR website for Chapter Treasurers. The state Registrar has been working individually with new Chapter Registrars and a final review of the updated version of the CASSAR Officer Handbook is being performed by a Past State President (Derek Brown). Our current state President is a member of the newly formed NSSAR Compatriot Training Program sub-committee which is tasked with developing a member training program. The current new member training manual is posted on the members section of the CASSAR website along with the new member mentorship program handbook and check list.

#### **4. Automate Meeting Minute Notes**

- a. Voice to print software exploration and purchase request

The state Secretary has purchased and has loaned us the use of a digital voice recorder. It was used successfully along with voice to print software at the 2021 Fall BOM Meeting expediting and automating the process of taking meeting minutes.

## **5. Find Chapter Activities Chair**

- a. Draft Quality/Excellent Chapter award development

The state President appointed a committee to develop an Outstanding Chapter Award. The Committee Chair Dr. Kent Gregory presented their recommendation for an annual Outstanding Chapter Award (not a contest) at the Fall BOM meeting. The award format and criteria we approved at the Fall Board of Manager's meeting and will begin in calendar year 2022 with the first awards being presented in April 2023. Compatriot Brandon Villardi of the Harbor Chapter has volunteered to fill the position of Chapter Activities Chair and will oversee the new awards program.

## **Long-term:**

### **1. Communications**

- a. Timely, targeted, and of interest
- b. Reporting methods and processes

Using communications software purchased last year, the California Compatriot is now being published monthly. The new version includes links to forms and items of interest. It is shorter, the information included is more current, and it is easier to produce than the previous quarterly version. The California Society is in the beta test group and is well represented at the national level on the various committees working towards automating the membership reconciliation and dues collection processes. This year at the Fall Board of Managers Meeting, Chapter Presidents or their Chapter representative were encouraged to make a short oral presentation of their Chapter activities, challenges, and successes for the benefit of other Chapter Presidents and our state leadership. Facilitating the interaction and information sharing between Chapter Presidents is the reason for the oral reporting request.

### **2. Support current programs**

- a. State and Chapter Program Chairs

Program support at the state level if measured by the number of program participants and activities is highly dependent upon the length of service, program knowledge, and motivation of the current Program Chairs. Filling vacancies and finding replacements has been a challenge. The CASSAR continues to present Public Service Awards at each state meeting and Youth Awards in each category at the Spring Meeting and Teacher Awards at the Fall Board of Managers meeting.

### **3. State Secretary workload**

- a. Explore Assistant Secretary position appointment

At the April Membership Meeting a committee was appointed to

review this goal and a recommendation was made to have the state President appoint an Assistant to the state Secretary. Shortly thereafter Barry Key, San Diego Chapter President was appointed to the position and has been doing a terrific job. The new position has been beneficial in assisting the state Secretary with preparation for our state meetings and improving the quality and submission rates of our Officer, Committee Chair, and Chapter meeting reports aka the book.

#### **4. Tax Preparation Assistance**

- a. Vendor Selection, budget, and approval

Jim Klingler, Vice-President South and former state Treasurer completed an RFP process and presented a recommendation at the Fall BOM for the SAR to engage the services of a professional accounting firm to prepare and file the required CASSAR Federal and State tax forms. The recommendation and funding were approved by the Board of Managers and included in the 2022 Budget.

#### **5. Storage Unit Evaluation**

- a. Long term needs assessment

Continued price increases and electronic data storage technology improvements have leadership questioning the continued need for storage of paper documents. The digital scanning of older records is being explored using volunteers, a future eagle scout project, and/or outside vendor. Plans are underway for the state Secretary and new state President to review the current inventory list and conduct a formal audit of the contents after the April meeting in Sacramento.

#### **6. America's 250 Anniversary**

- a. advanced planning and preparation
- b. public awareness
- c. new member opportunities

This a priority of the current State President and President General. CASSAR Treasurer John Ferris has been appointed Co-Chair of the CASSAR America 250 Committee improving the information and communication link with the NSSAR America 250 Committee. John has been busy writing articles and making presentations to SAR Chapters and outside organizations of similar patriotic purpose. An America 250 Public Service Announcement featuring the CASSAR has been distributed to media outlets throughout the state. This video was funded, written, and produced by a generous donation from our Media and Public Relations Chair and Gold Country Chapter President, David Gilliard with additional assistance and funding provided by John Ferris.

Our Media and Public Relations Chair David Gilliard has secured a sponsor in Senator Janet Yuen representing Orange County resulting in the introduction of Senate Bill 1600 - State legislation in support

of America 250, and the creation of a model America 250 Commission which would include appointed representatives from the SAR and DAR.

A special ad-hoc committee was appointed to recommend a draft program criteria and certificate for presentation by the CASSAR or its Chapters to outside organizations that help to promote America 250 activities and/or awareness in our communities.

The first California recipient of the America 250 Recognition Program Bronze Medal was honored at the Fall BOM and more Bronze and Silver Medals will be awarded at the April meeting.

Thank you again for all the work that went into completing our short -term goals and the progress made towards the completion of our long-term goals.

Brian Stephens