



GUIDE FOR COSSAR RECORDING SECRETARY/HISTORIAN

COSSAR Bylaws, Article IV, Section 1B(3): At the direction of the president, the RS/H shall call all meetings of the society and of the Board of Managers. He shall keep a record of the proceedings of all meetings of the society and the board. Under the direction of the president he shall conduct the general correspondence of both. He is responsible for maintaining the COSSAR Database, publication of the annual Membership Roster and updating National Personal Data Pages. Responsible for compiling and sending to NSSAR the Annual Reconciliation Report using the National Reconciliation Template form from the NSSAR website. Responsible for preparing the official list of delegates to the National Congress. He shall turn over to his successor any or all such records and correspondence, when he shall for any reason leave office. Beginning with the adoption of the original bylaws, the RS/H shall maintain a history of this society including: a chronological list of all officers with dates of service and other pertinent information; a chronological account of the more important activities of the society since its founding; and other data as appropriate. He shall conduct historical research as directed by the Board of Managers.

1. Records maintained by COSSAR Recording Secretary/Historian (RS/H):
 - a. Minutes of Board of Managers meetings and annual meeting.
 - b. Annual Chapter Reports (see Atch 1).
 - c. Annual Officer Reports given at State Conference.
 - d. Annual Committee Reports given at State Conference.
 - e. Archival files.
 - e. Active/Inactive Membership 3x5 card file (see item 2)

- f. COSSAR database for Membership Roster and Information Booklet (see item 3).
2. Card file of Active/Inactive COSSAR Members: Card file will contain members name, state and national number, wife's name if married, mailing address, telephone number, and ancestor's name.
3. COSSAR Database: This database will be maintained as an Excel file. New membership updates are derived from the Registrar General Transmittal Letters. This database is the source for the Word Document used to publish the Membership Roster. As changes are received, the COSSAR Database Excel file and the Word document should be updated immediately to insure it is always current. On the last day of each month, the RS/H should go to the National files through his Personal Data Page, and download National's Excel file for the COSSAR membership. If there are discrepancies between COSSAR and National files, it must be corrected immediately. COSSAR at-large and chapter members are identified on the database. Information on at-large members is provided to the COSSAR Treasurer for collection of annual dues and information on chapter members is provided to the appropriate chapter secretary.
4. Registrar General Transmittal Letters. Upon receipt of these letters from the MS/R, these actions will be taken:
 - a. For at-large members. Enter the appropriate data in the COSSAR Database and the NSSAR Member Database personal page record. Send a copy of the transmittal to the COSSAR Treasurer who collects dues for at-large members.
 - b. For chapter members, record the appropriate data into the COSSAR database, Membership Roster and National Personal Data page and send a copy of the transmittal letter to the chapter president for appropriate welcoming.
 - c. For Registrar General Transmittal Letters approving supplemental applications, update the 4x6 Card File and send a copy of the transmittal letter to the Chapter Secretary.
 - d. All information received by the RS/H, MS/R or treasurer pertaining to the gain or loss of members should be shared.
5. End-of-Year Report (EOYR). By 20 January, COSSAR must remit their dues to NSSAR with a copy of the National Reconciliation Template Excel file downloadable from the NSSAR website NSSAR Forms menu available from the Compatriots tab. The RS/H, MS/R and COSSAR treasurer will meet to reconcile the report and the amount of funds payable to NSSAR. COSSAR dual members are not on the NSSAR Excel file of COSSAR members as NSSAR shows them only with their "home state", not with COSSAR. However, they must pay their COSSAR Annual Dues and Chapter Annual Dues, if applicable, to maintain their "Dual Membership" with COSSAR. There may be a

few Dual Members reported on the Chapter or At-Large COSSAR Dues Collection reports, but they are not reported to NSSAR on the National Reconciliation Template Excel file. When reconciling our total COSSAR Membership with what is reported to NSSAR, we may have a few Dual Members in our COSSAR totals from the Chapters and At-Large reports that do not get reported to NSSAR. The RS/H is responsible for the preparation of the National Reconciliation Template Excel file as the annual report to NSSAR. It will reflect the COSSAR membership as of 31 December of the reporting year. It contains sections to account for new members, transfers in/out, deaths, drops, reinstatements, etc – as shown on the COSSAR Database Excel file. Members, who have not remitted their dues by 31 December, will be reported as “dropped for non-payment” on 1 January of the following year. Members, who pay their dues subsequent to 31 Dec, will be reported on the following year’s report as “reinstated.” To prepare this report, you must account for at-large and active members by completing a reconciliation of members with the chapters and the COSSAR treasurer. To accomplish this action you:

a. In mid-September, go to the NSSAR Member Database and download their Excel file of COSSAR members. After reconciling our COSSAR Database Excel file with the NSSAR file of COSSAR members, the RS/H shall download the National Reconciliation Template: Chapter Format. The RS/H shall prepare an Excel spreadsheet for each Chapter with the members for each Chapter and those who are at-large using this format. Note that if COSSAR has any Dual Members, the RS/H shall add a worksheet for such Dual Members to the Chapter or at-large spreadsheet. These spreadsheets shall then be sent to the COSSAR Treasurer for at-large members and to the appropriate Chapter Secretary so they can reconcile their records with COSSAR and NSSAR. Once this reconciliation is complete the COSSAR Treasurer and Chapters shall begin their annual dues collection process.

b. Using the National Reconciliation Template: Chapter Format, the COSSAR Treasurer and Chapter Treasurer shall update it as the dues collection process proceeds. Instructions for completing the spreadsheet can be found on the NSSAR website at the “Compatriot Tab, NSSAR Forms” dropdown menu. Once completed, a copy of the updated spreadsheet should be sent by each Chapter Treasure to the RS/H, MS/R and COSSAR Treasurer by 5 January of the following year. Chapter Treasurers should also send a copy to the Chapter Secretary and Chapter President so they know the results of the dues collection for the chapter and can updates their chapter records.

c. The RS/H, MS/R and COSSAR Treasurer reconcile all the reports by 10-15 January. Prior to meeting together, the RS/H consolidates the information from each Chapter and the COSSAR Treasurer to the National Reconciliation Template Excel file. Once these three COSSAR Officers consolidate and reconcile the year end COSSAR membership, the COSSAR Treasurer writes a check to NSSAR for the 2010 dues. The RS/H sends the COSSAR check and the printed Cover Sheet and Documentation Sheets from National Reconciliation Template Excel file to NSSAR. The RS/H should also attach the completed National Reconciliation Template Excel file to an e-mail to NSSAR.

d. On the 1st day of January, the Excel Membership Database file as of 31st of December, must be “saved as 200_”, meaning the following year. This allows the previous roster to be maintained as an old file as of 31 Dec, and the new file is the current working file.

6. The RS/H is responsible for the preparation and distribution of the annual Membership Roster and Information Booklet. It is a Word document created from the COSSAR Database Excel file using the Directory function as found in the Membership Roster Instructions file kept by the RS/H. Printing and mailing shall be NLT 1 April:

- a. 1 copy mailed to each member
- b. 24 copies to the COSSAR president. He sends a copy to each new member with his welcome comments.
- c. 5 copies to the MS/R
- d. 5 copies to the RS/H – one copy placed with official COSSAR files.

7. In May, the COSSAR MS/R receives instructions from NSSAR regarding delegates to the National Congress. This document shall be forwarded it to the RS/H. The delegates will be confirmed at the May Board of Managers meeting and the RS/H will prepare the COSSAAR list of official delegates and return it to NSSAR (instructions are on the forms and in their letter.). When received, the RS/H will forward credentials to individuals.

8. Inter-society transfers will be completed by using the *Application for Chapter Transfer Within COSSAR* (copy attached).

9. Chapter Secretary’s Reports to COSSAR Recording Secretary/Historian. Chapter secretaries will submit an *Annual Chapter Report* (copy attached) at the annual state conference.

10. Notices. The RS/H shall furnish members notices of meetings of the Board of Managers and State Conference meetings and proposed amendments to the COSSAR bylaws and standing rules. Notification is made by email when available.

THE COLORADO SOCIETY OF THE SONS OF THE AMERICAN REVOLUTION
ANNUAL CHAPTER REPORT

To be submitted to the State Recording Secretary/Historian at the Annual State Conference.

For the year 20_____

REPORT OF _____ CHAPTER

DATE OF REPORT _____

Name of Chapter

Secretary _____

Address of Chapter

Secretary _____

Email of President & Chapter

Secretary _____

Chapter Officers Installed on _____; For 20____
(date of installation)

OFFICERS NAME

OFFICE

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

DURING THE PERIOD 1 JANUARY 20____ THROUGH 31 DECEMBER 20____,
____ (number)

NEW MEMBERS WERE ADDED TO THIS CHAPTER. List names and approval dates. If necessary, attach separate sheet.

12

DURING THIS SAME PERIOD, _____ (number) MEMBERS WERE LOST. LIST NAMES, DATES, AND REASONS, (resignation, transfer, death, failure to pay dues, etc).

THIS CHAPTER GAVE THE FOLLOWING AWARDS TO: (name(s) of recipients).

NOTE OF ANY SPECIAL ACTIVITIES OF THIS CHAPTER, AND RECOMMENDATIONS FOR BETTERMENT OF THE ORGANIZATION (Chapter, State, or National level) (Use back of this sheet.

The Colorado Society of the Sons of the American Revolution



**APPLICATION FOR CHAPTER TRANSFER WITHIN COSSAR
TO THE DEMITTING CHAPTER SECRETARY**

I _____, Nat'l/CO Nos. _____
request transfer of my membership from the _____ Chapter to the
_____ Chapter.

Current Address Info: _____
Street Address

City State Zip+4

Phone and E-Mail: (_____) _____
Area Code Phone E-Mail

Signed: _____
Signature of the Compatriot Date

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**TO THE RECEIVING CHAPTER SECRETARY:**

I \_\_\_\_\_, Secretary of the \_\_\_\_\_ Chapter  
certify \_\_\_\_\_ is a member in good standing of our Chapter.

Signed: \_\_\_\_\_  
Signature of the Demitting Chapter Secretary Date

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TO THE COSSAR SECRETARY:

Compatriot _____ is hereby accepted as a member of the
_____ Chapter by transfer from the _____ Chapter.

Signed: _____
Signature of Receiving Chapter Secretary Date

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**RECORD OF TRANSFER COMPLETED BY COSSAR SECRETARY:**

Requested Transfer is effective as of: \_\_\_\_\_ (Date)  
Notice E-mailed to Demitting Chapter  
Notice E-mailed to Receiving Chapter  
COSSAR and NSSAR records updated \_\_\_\_\_ (Initials)