

GG 2021-2022 Email #1 to State Points of Contact 22 August 2021

As your new Genealogist General, I first would thank you for the honor and trust this position represents to me. I will be do my best to serve the National Society SAR in my new responsibilities. Continuing the practice of my predecessors, I will issue occasional letters to the state points of contact (SPOC's) on matters of interest. This is email #1.

I must report to you that a significant number of "state level" errors in applications have arrived at headquarters. I know that most of the SPOC's do an excellent job of preparing quality applications but we are still seeing too many of these errors.

Currently the application backlog is 8 ½ weeks for new applications and 33 ½ weeks for supplementals. Once an application gets to a genealogist's desk, the quality of the application packet is a major factor in the time required for review and a move to approval. To do our part in lessening the backlog, I am challenging the state registrars to help us achieve at least 50% reduction in the most common "state-level" issues.

A "state-level" issue is one that could be easily detected by examining the packet of documents that accompany the application. The top three are:

- Documents printed incompletely. The most common issue here is printing DAR applications -(which are 8 ½ X 14 inches) full size on 8 ½ X 11-inch paper. This cuts off the bottom of the application. Additionally, DAR chapter copies are submitted when only record copies can be accepted.
- Omitting essential documents entirely. There must be a proof listed for each generation and that document must be in the proof packet. Frequently, pages necessary for review are not included in the application packet.
- Submitting illegible documents. If you can't read it, the staff probably can't either. If the document is hard to read, i.e. census records, birth registers or wills, also provide a transcription. In this way can speed up the process and help the genealogist to see the document from your point of view.

We all realize that it's much quicker to approve an application on first reading than to find the errors, write a pending notice, set the applications aside, wait for a response, and reconsider it when the answer arrives. By signing approval as state registrar, you are saying that you believe that the application is ready for review at national.

I'm asking that you take the time necessary to carefully check each application from your state and insure we avoid these "state level" problems. A more detailed checklist is attached for your reference but please work on these three.

To help get this message down to the chapter level, I am preparing a training session by ZOOM to offered in the next month. Look for a follow-up email offering training of state and chapter registrars on properly reviewing applications to eliminate "state-level" issues.

I'm always glad to receive your comments. Just hit the reply button!

Bob Fish
Genealogist General

GG 2021-2022 Email #2 to State Points of Contact 01 October 2021

The Genealogy Committee met during the national Leadership Meeting held last week in Louisville. Several items of note occurred.

- A change to the NSSAR Genealogical Policies were adopted and placed in the policy manual:
“5.4001 Birth Certificate of Applicant is required. An applicant for membership shall establish his qualification for membership by providing a birth certificate or court order specifying his gender as male.”

This motion was, adopted by the Trustees on 04 March 2017, has been observed as our practice but was not previously placed in the Genealogical Policies. Thanks to Brendan Potter for pointing that out.
- Genealogy subcommittee structure was reviewed by Chairman Bill Schwetke. In particular, the subcommittee to review and update the Application Preparation Manual and make sure it complies with policies will be activated. Groups were appointed to also look at handling of Memorial Applications, DNA, and the policy on accepting printed sources. Chairman Schwetke is also considering additional appointments and they will be announced later.

On 22 September, I held a ZOOM meeting titled “Genealogy FAQ.” This first session, about 20 minutes long, discussed three “state level errors” and how they could be easily remedied by review within the state. A recording was made of the presentation and I encourage every State Point of Contact to view it and to pass the link to your chapters. It was very well attended on-line with many viewing the recording later. If you need a link to the recording, please email me. I am planning to present additional sessions about every other month. I will appreciate your input on what you would like to have discussed.

At the recent Annual Congress, 208 Compatriots were honored by receiving the Liberty Medal from the President General. These included 61 Compatriots who received their first Liberty Medal for recruiting 10 new members and 153 Compatriots who received an Oak Leaf Cluster for recruiting 10 more members. But that’s not all of the story. Forty-two of those men received more than one OLC, including Emory Neal (5), John Schatzel (7) and Timothy Ward (8)! Those three were this year’s Florence Kendall Award winners. Together the Liberty Medal honorees sponsored about 65% of all new members.

As of 24 September, the application status report shows that the most recent new application reviewed was received on 12 July and the most recent supplemental application reviewed was received on 08 January. This backlog has grown due to staff retirements and disability, the COVID lockdown, and a much larger than usual number of supplemental applications received during the lockdown.

I’m always glad to receive your comments. Just hit the reply button!

Bob Fish
Genealogist General

GG 2021-2022 Email #3 to State Points of Contact 01 November 2021

Several of you commented about the application status report (ASR) and this letter will address several of your concerns.

As of 29 October, the ASR shows that the most recent new application reviewed was received on 04 August and the most recent supplemental application reviewed was received on 01 February. The staff is making progress working off the backlog. We are still short staff due a staff retirement. Hiring an additional staff member is in progress.

Several people from the field have written with concerns about the timing of the ASR and the frustration of having to check multiple times before seeing the update. Mike Scroggins, Director of Operations, points out that input from at least three people to make the report: Jon Toon inputs information on reviewed applications weekly, Jessie Hagen prepares the report and Mick Pitzer posts it to the website. Sometimes someone is off that day and their sub fills in. They're going to make an adjustment so Mick will post the update on Friday morning, allowing a little more time to get the report ready. The report should be posted by 8:00 AM, Friday. Please understand that we have a small staff with people wearing several hats. Let me know what you think of the new schedule.

The following information regarding application signatures may be useful. The Chancellor General has issued an opinion that there is nothing in the Bylaws prohibiting stamped approval signatures as the application proceeds through the state approval process. For example, the state approval form requires two signatures:

State Registrar	Date Approved:
State Secretary	Date Approved:
Accepted by the State Board of Management (optional):	Date Accepted:
Sent to National Headquarters:	Date:

Depending on your organization, you may also have a state treasurer. If authorized by your state society, there is no problem with just one person reviewing the application and then stamping approvals for the others. For example, the registrar could receive the application, deposit the applicant's check and write a check for the national fee, prepare the transmittal and stamp the signature for the secretary. It would be a state Board of Management decision but it could speed up the process and save postage!

State and chapter registrars, please keep in mind the need to pay special attention to the "state level errors" of incorrectly printing DAR record copies and submitting the unauthorized DAR "chapter copies." Both will result in pended applications. See the video tape of Genealogy FAQ #1 by clicking:

<https://www.youtube.com/watch?v=06JfgkT6udQ> And look for an announcement of the upcoming Genealogy FAQ #2. The invitation will issue later this week.

I'm always glad to receive your comments. Just hit the reply button!

Bob Fish
Genealogist General

GG 2021-2022 Email #4 to State Points of Contact December 22, 2021

I send my warmest greetings for a Merry Christmas and a Happy New Year!

We have filmed the second edition of Genealogy FAQ, which was held by the Zoom conference system on 23 November. Those who missed it will be able to watch the recording which will be available shortly. Look for an announcement.

At the recent Genealogy Committee meeting, an important change to how Memorial Memberships are processed. Memorial memberships, which are after all based on the membership application of a living compatriot, will not be examined the same way as new applications. Memorial memberships are an excellent way for members to honor their close relatives and their patriot ancestors.

A policy adopted by the Trustees (and recently amended on 11 Dec) requires applicants to present a birth certificate or court order specifying their sex as male. The requirement for a birth certificate has been in effect since 2017. The adopted amendment allows for the President General or me to make exceptions to the documentation requirements (for example, when the birth certificate is impossible to obtain or when it does not indicate the sex of the applicant). This is a good policy for the SAR I urge you to support it.

Our policy on expediting applications has been in effect now since 2012 and provides for different levels of approval in order to have applications expedited for immediate review. See Genealogy Policies 6.4000 for details. The policy allows expediting “for applicants who are nearing the end of their lives (in hospice care, extreme advanced age, etc.)” In the absence of other issues, we have taken “extreme advanced age” to mean over about 85 (remaining life expectancy of 6.0 years). “Illness,” as can be seen from the policy, would have to be severe. We are pleased to grant expedited consideration when appropriate but, when requesting, please be specific.

As a reminder, proof documents are to be submitted on 8 ½ X 11-inch paper or 8 ½ X 14-inch paper. It is not required that the proofs be on SAR watermarked paper, just the application itself. Don’t submit proofs on smaller paper even though the document might be smaller than that. Also, don’t submit proofs printed double sided; use separate sheets for proofs.

We have seen a decrease lately on applications pended because of the “state-level errors” that we count on you to catch prior to submission. Congratulations and thanks! Please be mindful and help us drive these to zero. The three most common state-level errors are 1) submitting DAR chapter copies instead of record copies; 2) submitting DAR/SAR applications with the bottom 3-inches cut off due to improper paper or printer settings; and 3) documents cited on the application but not included in the application packet.

I’m always glad to receive your comments. Just hit the reply button!

Bob Fish
Genealogist General

GG 2021-2022 Email #5 to State Points of Contact January 13, 2022

If you traveled during the holidays, welcome back. I hope your travels were safe. Whether you stayed at home – as we did – or traveled, I hope your celebrations were great!

We have several changes that occurred recently in the Genealogy Department:

- Deborah Maddox, a former employee, has rejoined SAR and will focus on supplementals.
- Jeff Bell, also a former employee, has rejoined SAR. He will focus on administrative tasks that take time away from reviewing applications.
- Sam Dunn, who has been working in Genealogy and digitization will go to full-time in Genealogy.
- Brian Christiansen, who working part-time in Genealogy, left to take up his old job in another company.

I believe the additional time from Sam and the addition of Deborah and Jeff will go a long way to reducing our backlog. There are many applications in the queue, though, so please be patient.

The Genealogy Policies Manual has been updated effective with the changes through 29 Nov. Also, the Membership Cost Manual has been updated to reflect the changes made at the 2021 Congress. Both these manuals are posted on the SAR website.

This brings up a worthwhile item to share with state and chapter webmasters. If you copy the URL for the manual and use that as the link on your website, you may not be up to date when manuals are updated. Staff recommends you use, e.g. <https://www.sar.org/resource-repository/> and locate the manual of interest down the page. When manuals are updated, the old static link will either point to an old version of the manual or appear as a broken link. The Membership Cost Manual, Application Preparation Manual and the Genealogy Policies Manual are three manuals specific to our work but a great of information about other SAR Programs is also available from that page. Check it out!

The recording of Genealogy FAQ #2 is now available. The link to view it on You Tube is: <https://youtu.be/vyWUYp9B7ZY> That will take you directly to the session. Genealogy FAQ #3 will be streamed at 8:00 PM (Eastern) on 25 January. The speakers will be the three winners of the Florence Kendall Award at the 2021 Annual Congress. The Florence Kendall Award goes to the three Compatriots who were sponsors of the largest number of new members. This year's total for those three: 198! The invitation will be issued later today. Attendance to the live session is limited to 300 seats but we will have the recorded version available for all viewers.

Any comments? Just hit reply.

Bob Fish
Genealogist General, NSSAR

GG 2021-2022 Email #6 to State Points of Contact March 7, 2022

I have just returned from the Spring Leadership Meeting and I have several items of interest to you.

As of Thursday, 3 March, the most recently reviewed new application was received on 29 Nov 2021. The most recently reviewed supplemental application was received on 20 May 2021. President General Davis Wright and the Executive Committee – along with many others – share my concern over this delay. He directed me and Executive Director Don Shaw to develop solutions and to report back within a month. Stay tuned.

Since I became Genealogist General there have been 306 applications pended. It is of great concern to me that 81 of these were pended for “state level errors.” These are ones that could easily be detected before sending the application to national. They include:

- DAR record copies printed such that the bottom 3 inches are cut off
- Submitting chapter copies of DAR records
- Missing documents, including applicant’s birth certificate
- Illegible or incomplete documents

State registrars, it is your responsibility to review applications before sending them to national. While “state level errors” have come down a little, they still represent 25% of pended applications. I’m sure you agree with me that is too many and I again ask for your help. Each pended application delays every application after it.

A change was adopted to the Genealogy Policies to allow an increase in the use of DNA-related proofs. Previously DNA-related proofs were limited to connecting generations 1 to 2, only. This has been extended to now allow connecting generations 1 to 2 OR generations 2 to 3 only. The other requirements for use of DNA remain unchanged. The Genealogy Policy Manual will be updated shortly to reflect this change.

Another approved change directly affects people sponsoring applications. We are announcing an enhanced Liberty Medal Award. Previously, the Liberty Medal was awarded to members who were first-line sponsors of 10 approved new member applications. At the upcoming Annual Congress, you will be awarded a bronze Liberty Medal for sponsoring 10 approved new member applications as before. For each additional 10 new members up to 90, you receive an oak leaf cluster and recognition of your cumulative new member sponsorships. At 100, you’ll receive the new silver Liberty Medal and for 200, you’ll receive the gold Liberty Medal. Of course, each intervening 10 new members will bring an oak leaf cluster. I think this will be a great recognition of those Compatriots who are consistently generating new members over a period of years. You Liberty Medal awardees generate 65% of our new members. Thank you and keep up the great work!!

Work is underway in the Genealogy Committee to revise the Application Preparation Manual. This will be a major upgrading, probably available in the Fall.

The recording of Genealogy FAQ #3 is now available. The link to view it on YouTube is: <https://www.youtube.com/watch?v=9yakaggGzAQ>. The next video in our series, FAQ #4, will be scheduled shortly. Look for an announcement. I’m very pleased with the number of people who tuned in live and who viewed the recording. That’s nearly 300 people.

Any comments? Just hit reply.

Bob Fish
Genealogist General, NSSAR

GG 2021-2022 Email #7 to State Points of Contact April 11, 2022

I continue my practice of reporting the status of the application queue in these reports. As of Thursday, 7 April, the most recently reviewed new application was received on 28 Dec 2021. The most recently reviewed supplemental application was received on 15 Jul 2021. We have hired a new full-time and a part-time genealogist to help reduce the backlog; they start work the first week of May.

The recording of Genealogy FAQ #4 (How the staff evaluates applications) is now available. The link to view it on YouTube is: <https://youtu.be/slDhifd6iEg>. I'm very pleased with the number of people who tuned in live and who viewed the recordings. For each session, we've had 300 – 500 views! Please make sure that this link is passed to anyone who works with applications. The next video in our series, FAQ #5, "Appeals" will be scheduled in May. Look for an announcement. That will be followed by FAQ #6, "How to construct a genealogical proof argument" and it's scheduled right after Congress in July.

The links to the other FAQ series are on the website under "genealogy resources." The earlier letters to State Points of Contact are on the website under "SAR Genealogy Policies and Materials."

Since the 2021 Congress, 390 applications have been pended. I read every pending report. I'm delighted to report that the number of "state level errors" (ones that could be easily located at the state level by examining the application packet) has decreased significantly. It's down from 25% after Congress to just less than 15% now. Congratulations! I would like to see it approach zero as all these errors can be easily spotted.

- DAR record copies printed such that the bottom 3 inches are cut off
- Submitting chapter copies of DAR records
- Missing documents, including applicant's birth certificate
- Illegible or incomplete documents

State registrars, if you are not checking for these simple errors, I believe you are letting down your state society and our applicants. Each pended application delays every application after it.

Several people reported issues complying with the action passed by the Trustees at their December 2021 meeting:

An applicant for membership shall establish his qualification for membership by providing a birth certificate or court order specifying his gender as male. However, exceptions to documentation requirements may be allowed on a case-by-case basis by either the Genealogist General or President General.

You should be aware that some states have defaulted to issuing birth certificates that omit gender. By requesting that the sex of the child be specified, you will likely obtain a compliant birth certificate.

Regarding pended applications, the most frequent cause for pending is summarized as "Lineage. Person indefinite." This occurs when the applicant claims lineage through a person and there are multiple persons of the same name in that same area and time. It's worthwhile checking on and, if you see that possibility, you can submit a proof analysis that tells why you decided the others are not in your lineage. For example, only two families of the surname were in the county in 1840, but only one had a child the right age and gender to be the ancestor.

Genealogy tip: Don't forget the indirect proofs through siblings by using multiple documents. For example, John was the father of Lon, and Lon was the brother of Ron. Therefore, John was the father of Ron. You should submit a proof analysis to explain this analysis from your point of view.

Any comments? Just hit reply. You will get an answer!

Bob Fish
Genealogist General, NSSAR

GG 2021-2022 Email #8 to State Points of Contact 3 June 2022

(Please cascade this within your state to others at the state and chapter level)

I continue my practice of reporting the status of the application queue in these reports. As of Thursday, 2 June, the most recently reviewed new application was received on 2 Mar 2022. The most recently reviewed supplemental application was received on 16 Sep 2021. The part time genealogist is increasing to full time and another part time genealogist has been rehired. I believe that additional staff represents the only way to significantly reduce the backlog without weakening our admission policies, something I know is unacceptable to the membership.

At its meeting on 23 May, the Genealogy Committee approved a significant change in the way record copies of SAR are viewed. Effective immediately, record copies of SAR applications dated more recently than 1 January 2012 will be accepted as proof for the corresponding service, lineage and related facts on SAR applications. This does not apply to information that has been determined to be incorrect by SAR and documented by an approved flag. This is similar to the way DAR record copies are viewed except that the date certain for DAR applications is 1 January 1985.

A revised edition of the Genealogy Policies that incorporates this change and other minor actions by the Genealogy Committee will be issued by Bill Schwetke shortly.

The recording of Genealogy FAQ #5 (Appeals) is now available. The link to view it on YouTube is: <https://www.youtube.com/watch?v=STjlxXWVGVE>. I'm very pleased with the number of people who tuned in live and who viewed the recordings. For each session, we've had 300 – 500 views! Please make sure that this link is passed to anyone who works with applications. The next video in our series, FAQ #6, "How to construct a genealogical proof argument" and it's scheduled right after Congress in July.

The links to the other FAQ series are on the website under "genealogy resources." The earlier letters to State Points of Contact are on the website under "SAR Genealogy Policies and Materials."

I offer my congratulations to those registrars and SPOC's who have worked to reduce pended applications resulting from the 4 "state level errors" I've identified and talked about. Still recurring are birth certificate problems. (5 pends within the past two weeks.) Please be sure to check this with **EVERY** new application!

Genealogy tip: Consider Bible records. Many old Bibles are in genealogical libraries such as Louisville's Filson Historical Society. "Family records, including Bibles and letters containing names, relationships, and dates of births, deaths, and marriages, provided that the author was in a position to have knowledge of the information in question. ... For records from Bibles or other books, the title page bearing the date of publication should be provided." [Genealogy policy 5.4000]

The SAR's Annual Congress is just about six weeks away. I hope to see you there!

Any comments? Just hit reply. You will get an answer!

Bob Fish
Genealogist General, NSSAR