



Annual Report 2016

Sons of the American Revolution Foundation, Inc.



The SAR Foundation, Inc.

The SAR Foundation, Inc. is a 509 a3 Kentucky Corporation (treated as a 501 c3 by the IRS) headquartered in Louisville. Its mission is to support the NSSAR. Additional information can be found on our website www.sarfoundation.org

The SAR opportunity:

The Sons of the American Revolution is more than a lineage society. Our mission has always been to honor those who founded the United States and to inspire everyday Americans to make personal connections with history.

We believe that history is not simply our past – It is a living, breathing, evolving and guiding spirit in our present and our future. We are our history – and it is us.

Before us is a great opportunity to make history relevant, and to provide a touchstone for visitors to learn about their ancestors and make personal, profound connections to a not-so-distant past.

Our guiding principles reveal the American Revolution as a time when real people struggled and fought for causes they believed in – just as they do today. These stories underscore the link we still share with our ancestors.

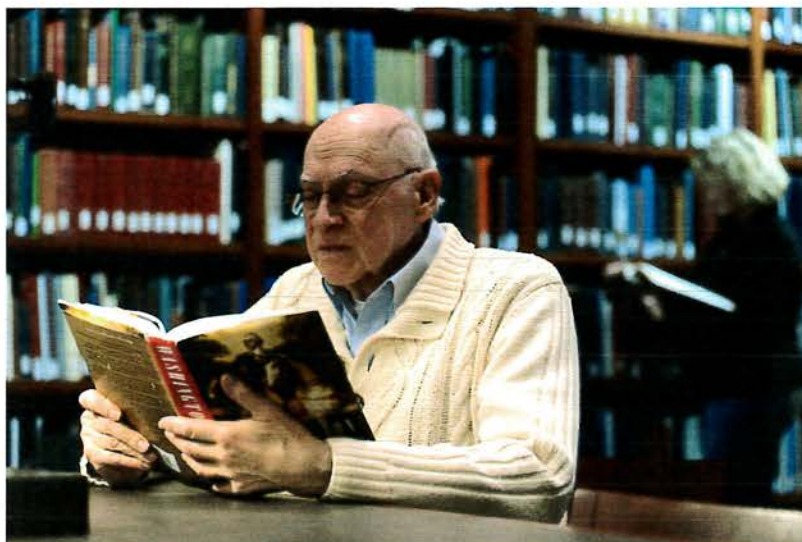
Each year, we capture the imagination of scores of school children. Through field trips and special outreach programming, we inspire them to delve further into history, genealogy and civics education.

We're tremendously proud of that success. But there's still more to be done. It's our hope that our nation's history, still relevant today, will be passed on and celebrated by every generation to come.

Portions of the text and pictures on this page were taken from the Center for Advancing America's Heritage fund raising brochure provided by Solid Light, Inc.



Center for Advancing America's Heritage



SAR Genealogical Library



Outreach Education

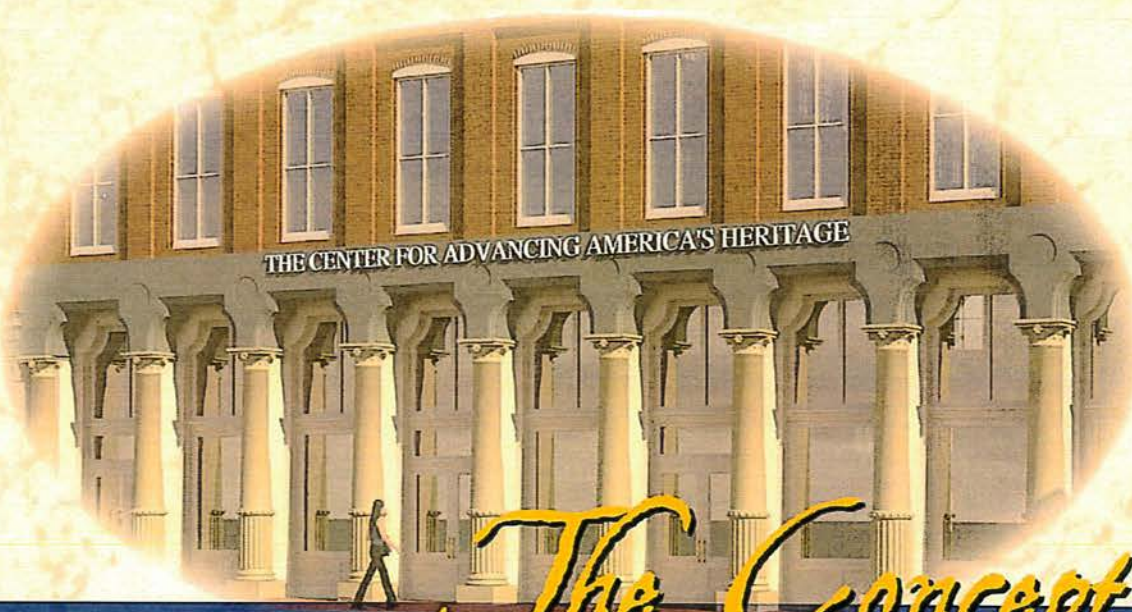
THE CENTER FOR ADVANCING AMERICA'S HERITAGE

has been a dream of National Society of the Sons of the American Revolution since 2001. It was conceived to be an integral component of the National Society providing patriotic and civic education for all people based on the shared heritage and the experience of our Country's Founders.

The Center consists of the SAR genealogical library, opened in September 2010, and proposed outreach education facilities yet to be completed. By incorporating the newest technologies in long distance learning, the Center will share its resources with citizens of all ages and interests. Its location in the prestigious "Museum Row" on West Main Street in downtown Louisville, Kentucky, has the added potential of attracting large numbers of tourists, which will enhance the visibility and standing of the SAR.

A big step in completing the Center was the September 2014 grand opening of the office and outreach education section of the Center building. Much work though remains to be done to complete the SAR Center project.

We have envisioned an outreach education experience that we believe will ignite imaginations and inspire a newfound appreciation for American history. We invite you to be part of our dream. Please consider a donation to the SAR Foundation in support of the Center for Advancing America's Heritage.



The Concept

MESSAGE FROM THE FOUNDATION CHAIRMAN

The SAR Foundation has been involved with fundraising for several years allowing the move to West Main Street along with the successful completion of our genealogical research library and occupation of the second-floor offices. But the job is not complete. We are challenged with raising money to fund our education center with a much-anticipated exhibit area, and retiring our construction debt on our revolving line of credit.

The Trustees voted at the 2016 Spring Trustee Meeting to pay down construction debt by \$500,000 leaving just under \$750,000 on the 5th/3rd line of credit. An additional \$80,000 has since been paid reducing the debt to \$635,732.00. This was made possible by bequest in the amount of \$55,000.00, and \$25,000.00 from the NSSAR Budget. The challenge still before us is to pay off the remainder of the construction loan while also funding the other priorities of the National Society including digitization of records and final construction.

At the Fall Leadership Meeting, the Trustees received an offer from Solid Light to donate their time and expertise for additional work to be performed on the Design of the museum. This offer is to do only the initial Design Phase as an in-kind donation from Solid Light and requires no expenditure by the SAR.

During the 2017 Spring Leadership and Trustee meeting, we hosted our first traveling exhibit in our educational outreach space, open to our members and the public. It featured the exhibit "Chartering Freedom" as provided by the National Archives and Records Administration (NARA). The exhibit was a great success and we look forward to having many more in the future. We also now have moveable display boards for future traveling exhibits. Even if we decide not to build a museum, the main floor could be used for exhibits like those that we hosted this past spring. The space could also house our existing collection of artifacts and displays. We can continue to rent out the space on the first floor for various events as well. However, what is the vision of the SAR for the use of our space? Is it best met with an educational center, small exhibit space or rental hall? The decision will ultimately be decided by our ability to raise funds. Your support is vital. Please help by supporting the SAR Center project.



J. Michael Tomme, Sr., President General 2016-2017
Chairman and CEO, SAR Foundation, Inc.

THE CAAH CAPITAL CAMPAIGN CHAIR

SAR headquarters is now in a beautifully restored historic building, dating from the 1800's when it was a wagon wheel factory, located on Museum Row, Main Street in Louisville, Kentucky. The relocation from another site and all the restoration to the "new" building has materialized over several years efforts to fund without long-term mortgage debt - a Capital Campaign.

The results of this everlasting campaign have provided a magnificent genealogy library, administrative offices for the SAR's nationwide headquarters, space for an education outreach activity, and the planned Center for Advancing America's Heritage to be a public space of museum quality. While supporting the many programs for youth in the network of state societies and chapters, the work goes forward to complete the Museum as a place to tell the story of the nation's founding in the heartland of America.

The faithful and loyal generosity of SAR compatriots over many years has provided the means for the advances and accomplishments that have been realized. An original capital campaign from the late 1990's evolved into a new 1776 Society campaign in 2015. A legacy society - The Founders Circle - also has been launched to encourage estate planning. Each of these programs go forward with annual emphasis to the growing membership.

The Capital Campaign will continue to ask for the generosity of loyal compatriots. At the same time, a program to promote local community awareness and support will be undertaken with the Louisville citizens committee. And an effort to find wider national support from foundations and organizations is underway.

In recent years, shifting priorities have cut into history and civics education in schools across the country. Lost in this is teaching the values and ideas that brought the nation to be. Too many Americans are at risk of growing up unaware of the remarkable story of the nation's founding. The SAR is bringing an exciting program forward to enhance knowledge and magnify the greatness bestowed upon us from those many years ago- and it will be in the heart of the country.

Without the continuing patriotic support these efforts cannot go forward. Past generosity has fueled the progress made, and ongoing generosity will allow the creation of a national treasure in the country's heartland to tell the Nation's story. The Campaign must carry on.



Lanny R. Patten
CAAH Capital Campaign Chairman

SAR FOUNDATION, INC. PRESIDENT

The 2016 Annual Report summarizes income and expense for the SAR Foundation, provides balance sheet numbers, lists those who have made gifts of \$100 or more to the Foundation during 2016, and lists major contributors who have qualified to have their name placed on the Patriots Memorial Wall. We are proud to report continued strong support by our members and friends.

Financials on the following page show combined total funds raised for the years 2000-2016 of \$12,606,890. As of December 31, 2016, donations from 7,548 (22%) of our 34,855 members have been received with an average of \$327/member succeeding our original goal of 20% at \$250/member.

Approximately \$9.53 M has been spent on the library and office construction since 2008. This includes purchase of the West Main Street site (1.45 M) and \$7,935,178 for design work, construction and furnishings.

The Fifth St. Site at our prior location on South Fourth Street cost \$481,523. The site was subsequently sold for a profit with the proceeds going to the National Society and used to create the Building and Outreach Education Fund. None of that money has been spent. The fund has been set aside for building maintenance and outreach education.

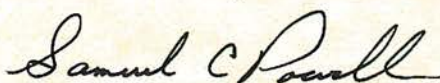
The cost of fundraising totals \$2,003,244 over the past 17 years. The Foundation Board has minimized fundraising expenses by using volunteers but felt the need to hire the assistance of one staff person. Most of the expense has been for copying, postage and other office expenses associated with direct mail campaign. An average of 15.9% of the money raised has been spent on fundraising with every attempt to keep the cost of fundraising as low as possible. Fundraising expense for this past year (2016) was \$117,720, consistent with the expenses for prior year.

The Statement of Cash Flows and Asset Value shows contributions for 2016 of \$531,362, down 25% from \$713,403 the prior year which was partially due to the shift in fundraising priorities. Performance was helped, however, by a strong market with investments gaining \$403,184 in value for a total income for 2016 of \$934,546.

In addition to the \$934,546 income received, Solid Light announced their intention to make an in-kind gift to the NSSAR for the value of the work required to complete step 1 of the proposed museum Design. That gift will be accounted for in the year that the work is done.

Transfers from the Foundation to the NSSAR were made during the year for operations (\$105,000), for improvements to the building (\$484,607) and to support NSSAR endowed programs (\$214,247). The Foundation also paid \$250,000 toward reduction of the line of credit. Net assets at the end of 2016 are \$7,871,107 down only \$8,797 from the end of prior year 2015.

We are deeply grateful for the support we have received from all SAR compatriots and friends. This high level of support allows us to greatly enhance the impact potential of the SAR's mission. Together, we can make a difference. Please support the Foundation's fundraising initiatives.



Samuel C. Powell, Ph.D.
President, SAR Foundation, Inc.

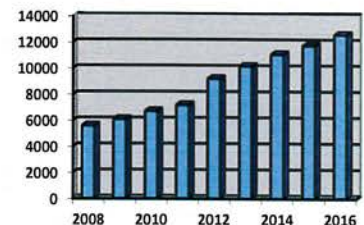
**SOCIETIES THAT HAVE ACHIEVED
20% MEMBER DONORS:**

Alabama	Nebraska
Arizona	Nevada
California	New Hampshire
Colorado	New Jersey
Connecticut	New Mexico
Delaware	New York
District of Columbia	North Carolina
Florida	Ohio
Illinois	Oklahoma
Indiana	Oregon
Iowa	Pennsylvania
Kansas	Rhode Island
Kentucky	South Carolina
Louisiana	Tennessee
Maine	Texas
Maryland	Vermont
Massachusetts	Virginia
Michigan	Wisconsin
Missouri	Wyoming
Montana	

**SOCIETIES THAT HAVE ACHIEVED
20% MEMBER DONORS
AND
\$250 AVERAGE/SOCIETY MEMBER:**

Arizona	Missouri
California	New Mexico
Delaware	North Carolina
District of Columbia	Oregon
Kansas	Pennsylvania
Kentucky	Rhode Island
Maryland	Vermont
Massachusetts	

**CUMULATIVE TOTAL DOLLARS RAISED
SAR Center CAPITAL CAMPAIGN:**



\$ Cumulative for Year:

2007 = \$4,265,387	2012 = \$9,227,842
2008 = \$5,607,328	2013 = \$10,187,755
2009 = \$6,121,498	2014 = \$10,844,087
2010 = \$6,729,125	2015 = \$11,772,871
2011 = \$7,208,628	2016 = \$12,606,890

2000 - 2016 Statement of Activities for the Center for Advancing America's Heritage Capital Campaign

Revenue:

Total Funds Raised from 2000 to 2015	\$	12,606,890
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Expenditures:

Main St. Site

Purchase of property	\$	1,452,920
Architect fees	\$	668,070
Build-out and Furnishings	\$	6,594,532
Appraisal, legal and concept design	\$	672,576
Purchase of Sons of Liberty 1775 statue	\$	50,000
Registration fees for fundraising in states	\$	96,735
Total Main St. Site	\$	9,534,833

Fifth St. Site

Purchase of land and buildings	\$	268,034
Site clearing	\$	40,910
Architects, legal, structural engineering, etc.	\$	172,579
Total Fifth St. Site	\$	481,523

Development and Fundraising	\$	2,003,244
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Total Expenditures 2000 - 2015	\$	12,019,600
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<u>Funds Available at 12-31-15</u>	\$	587,290
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comprised of:

Cash and investments, less current payables	\$	470,367
Pledges (net of allowance and discounted to net present value)	\$	116,923
Total funds available 12-31-15	\$	587,290

Year 2016

The SAR Foundation, Inc.
Statement of Cash Flows and Asset Value for the Year 2016

Revenue	
Contributions	\$ 531,362
Bad Debt Expense	\$ (24,693)
Net investment return	\$ 403,184
Total Revenue	<u>\$ 909,853</u>
Fundraising Expenses	\$ (117,720)
Transfers to the NSSAR	
For Main St. build-out and furnishings	\$ (484,607)
For NSSAR operating expenses	\$ (105,000)
For NSSAR endowed programs	\$ (214,247)
Total Transfers (Foundation to NSSAR)	<u>\$ (803,854)</u>
Transfers from the NSSAR	
For the Building & Outreach Education Endowment Fund	\$ -
For donations intended for Main St. construction	\$ 1,924
For endowments	\$ -
Total Transfers (NSSAR to Foundation)	<u>\$ 1,924</u>
Total Transfers	\$ (801,930)
Change in net assets	\$ (9,797)
Net Assets, beginning of year	\$ 7,880,904
Net Assets, end of year*	\$ 7,871,107
*Net Assets, End of Year:	
Undesignated	\$ (22,436)
Designated for investment in property and equipment	\$ 1,361
Board designated	\$ 4,526,308
Temporarily restricted, for CAAH	\$ 501,200
Temporarily restricted, for SAR Programs	\$ 2,796,948
Permanently restricted	\$ 67,726
Total Net Assets, End of Year	<u>\$ 7,871,107</u>

2016 SAR CAPITAL CAMPAIGN CONTRIBUTORS
Members, Non-Members, Foundations and Societies

\$50,000 and Over

Elizabeth Holliday Ramsey Estate

\$10,000 to \$50,000

Louis Victor Carlson Jr.
 Former Pres. Gen. Joseph William Dooley
 J. Phillip London

\$5,000 to \$9,999

National Ladies Auxiliary
Henry B. & Jessie W. Keiser Foundation
France Society SAR
 John Mark Briggs
 David Jones Cooper
 Russell Frederick DeVenney Jr.
 Lanny R. Patten
 Robert Whitaker Proctor
 President Gen. J. Michael Tomme Sr.

\$2,500 to \$4,999

Ken Lee Betterton
 Lawrence King Casey Jr.
 Michael James Elston
 John Howard Franklin Jr.
 Larry T Guzy
 Philip Zell Horton III

\$1,000 to \$4,999

Mildred V. Horn Foundation
Eric & Elizabeth Taylor Fund
Central District
California Society SAR
Florida Society SAR
Miami Chapter, FL
William C Corum Chapter, MO
Philadelphia-Continental Chapter, PA
 Warren McClure Alter
 Douglas Quinn Bergholdt
 Clarence David Billings
 David Graham Boring
 Paul Robert Callanan
 Donald Gene Connelley
 Darrell Horace Cooper
 Former Pres. Gen. Roland G. Downing
 Lawrence Gene Fehrenbaker Sr.
 James Clarence Fosdyck
 Gilbert Marion Gibbs
 Ernest Leopold Irish
 Former Pres. Gen. Thomas E. Lawrence
 Theodore Rex Legler II
 Kenneth Eugene Mahan
 Stephen John Miller
 Daniel Scott Preston
 Robert Alwyn Sapp
 Charles B. Severs
 Bobby Delano Shaw
 Charles Burroughs Smith V
 James Charles Taylor
 Tony Lee Vets
 Wallace Milton Wadlington

Charles Herbert Wheeland
 Henry Kellogg Willard II

\$500 to \$999

Ladies Auxiliary Gerogia Society SAR
Ladies Auxiliary Illinois Society SAR
Ladies Auxiliary Ohio Society SAR
Ohio Society SAR
Germany Society SAR
Tennessee Society SAR
Wisconsin Society SAR
Brazos Valley Chapter, TX
Eagle Chapter, CA
Dr George Mosse Chapter, SC
Piankeshaw Chapter, IL
 Robert Walter Abel
 Michael Joseph Abraitis III
 Myron Frazier Gearhart
 Stephen Matthew Baldwin
 Herbert Baughman Beighley III
 Richard Kemp Blodgett
 Alan Brown Brooking
 Herman Charles Brown
 Foster Sterling Burba
 Martin Myrl Burdick
 Kenneth Scott Collins
 Terrance Kanear Donley
 John Richard Ferris
 Lester A Foster Jr.

William J. McKim
 Lawrence Edward Oliver
 John Calvin Pankey
 Charles Bruce Pickette
 David Stone Pierson
 Joseph Jesse Robinson III
 Stephen Walter Rohrbough
 R. Walter Rutledge
 Stephen Lantz Salyer
 J. Thomas Showler
 Abner Pierce Stockman III
 George Kim Strunk
 Stephen Paul Thompson
 John Duffus Weiss
 James Thomas Wood
 Davis Lee Wright
 William Clarence Wyatt

\$250 to \$499

Ladies Auxiliary Alabama Society SAR
Great Lakes District
Delaware Society SAR
New Mexico Society SAR
Empire State Society SAR
Riverside Chapter, CA
Brevard Chapter, FL
Emerald Coast Chapter, FL
Jacksonville Chapter, FL
Saramana Chapter, FL
St. Petersburg Chapter, FL
Tallahassee Chapter, FL
Piedmont Chapter, GA
Anthony Halberstadt Chapter, IN
Kings Mountain Chapter, NC
Salisbury Chapter, NC
Thomas Jefferson Chapter, VA
 Joseph William Albright
 Thomas Dale Ashby
 Mr. David Erwin Bell
 MAJ Robert Everett Brewer
 Harry Robert Brindell III
 Richard LaVerne Brown
 David Philip Bryant
 Bruce Alden Buehler
 John Stephen Bugg
 Donald Burdick
 Patrick Marion Cave Jr.
 Roger Warren Coursey
 Ian Maclaren Cunningham Jr
 Charles Dwelle Daniel Jr.
 George B. Delaplaine Jr.
 Don Neal Drewry
 Jack Powell Dugger
 Michael Ellis Fishbein
 Herbert Mynatt Floyd
 Stanley Livingston Foster
 Douglas Carleton Frechtling
 Norman Rickard Frisbie
 John Philip Goddard
 Scott William Goodhue



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 Dean Lawson Haas
 Eugenius Sheppard Hammack
 Joseph Taylor Harper
 David George Jessel
 Ronald Mayo Johnson
 Edward Townsend Ladd Sr.
 Lorance Dix Lisle
 Leslie Roy Magee
 Lee William Matson

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Clark Whelton
Robert Ervin Williams
Lee Allan Wooderson

\$100 to \$249

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Ladies Auxiliary Texas Society SAR
Virginia Society SAR
Birmingham Chapter, AL
Sacramento Chapter, CA
Harbor Chapter, CA
Mount Evans Chapter, CO
Lake Sumter Chapter, FL
Highlands Chapter, FL

Palm Beach Chapter, FL
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Fox Valley Chapter, FL
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Warren Ernest Johnson
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Demas L. McVay Jr.
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Scott Howard Miller
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Brent Dean Morgan
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Howard Randall Morgan
Jack Wesley Morgan
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Carl Herbert Parker
Burton Weatherbee Pease
Ronald Wayne Peterson
Robert Stanley Phillips Sr
Lloyd Norris Puckett Jr.



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Terry Lee Weatherspoon
Dennis Wayne Wells
William Lochridge Wells
Robert Allen Wharton Sr
Richard Duane White
John Larry Whitfield
Philip Donald Whitley
Thomas Newton Williams
Cranston Williams Jr.
Arthur Everett Wills
Thomas Garland Wilson Jr.
Fred Amos Wilson
Jim Lester Wilson
William P. Winkler
Gregory Robert Woodard
Otis Oliver Wragg III
Albert Jay Wright III
George Wayne Wright
Blaine Eugene Young
James Brann Young
Kenneth Dell Young
Matthew David Young
Walter Richard Young Sr.
William Wright Zimmer

Donors Qualified For Having Their Name Placed On Patriot's Memorial Wall

Over \$ 1,000,000

Dr. William C. Drinkard, Jr. Foundation

Dr. Samuel C. & Karen G. Powell

\$500,000 to \$999,999

James Graham Brown Foundation

Anne Donahue-Lampman Estate

James S. and Mary Craik, Jr.

\$250,000 to \$499,999

Robert Friend Estate

Lanny R. and Ann H. Patten

\$100,000 to \$249,999

City of Louisville

National Ladies Auxiliary SAR

James Elson Hesse Estate

Millett Charitable Remainder Trust

Benjamin Morris Estate

Eliabeth Holliday Ramsey Estate

R. W. Svendsen Estate

I. Barnett and Virginia Ellis

Drs. J. Phillip and Jennifer London

Eleanor B. Niebell

\$50,000 to \$99,999

Branch Bank & Trust Foundation

Mildred V. Horn Foundation

Sam Swope Family Foundation

Howard Downing Estate

Fred Dumont Huyler Estate

Pennsylvania State Society

George H. Brandau

PG Dr. Roland G. and Norma Downing

Mr. and Mrs. John H. Franklin Jr.

PG Dr. Henry N. and Mary McCarl

William D. McKinney

Robert L. McNeil Jr.

John Frederick Neace

Robert Whitaker Proctor

T. Alan and Christie A. Russell

PG and Mrs. Nathan E. White Jr.

\$25,000 to \$49,999

Fifth Third Bank of Louisville

Gheens Foundation

Robinson Family Foundation

Joseph Howard Adkins Estate

Dorothy Butler Estate

Charles Miller Davis Estate

Eugene Reed Estate

John M. and Margaret Straight Estate

Ladies for the SAR Library

Texas State Society

Franklin J. and Velma C. Appl

Ken Lee Betterton

PG Lindsey Cook Brock

Rt. Rev. and Mrs. Louis V. Carlson, Jr.

Sidney Clifford Jr.

PG Joseph William Dooley

David Albert Hockensmith

Eugene David Melvin

Lowell C. and Vivian Reed

Arnold J. and Janice Seidule Jr.

PG J. David and Evelyn Sympson

PG J. Michael and Cilla Leed Tomme, Sr.

Jamew Roderick Weeks

PG and Mrs. Bruce A. Wilcox

\$15,000 to \$24,999

Henry B. and Jessie W. Keiser Foundation

T. Frazier and Nancy Morian Estate

Charles J. Sherman Estate

France Society

California State Society

Georgia State Society

Maryland State Society

Ohio State Society

Tennessee State Society

Virginia State Society

Miami Chapter, FL Society

Paul Revere Chapter, TX Society

Warren and Nancy Alter

James and Catherine Barkley

William A. Broadus Jr.

John Charles Echerd

John Carroll Ellingson Sr.

Randall and Terri Ellis

Dr. Kent and Lisa Gregory

Larry and Karin Guzy

Renaldo Joseph Hamilton

PG Dr. Howard F. and Nancy Horne

Philip Zell Horton III

Jonathan David Hunt

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