

**Emails to State Points of Contact  
25 July 2014 - 4 July 2018  
John D. Sinks  
Genealogist General, July 2014-July 2018**

## **Email #41 to State Points of Contact.**

4 July 2018

This day let us remember the contributions of our ancestors to the creation of this nation, and resolve what we will do to sustain the principles upon which it was established.

**Genealogy Training Material Posted.** There is now a section on the SAR website, Portable Digital Materials ( <https://sar.org/portable-digital-materials> ), with over a dozen links to files for genealogy and application-preparation training are located. I strongly encourage you to forward this information to all of your chapter registrars and anyone in your state society who is active in recruiting new members and preparing applications. You may even consider posting the link on your state society website. Many of the documents were prepared by Staff Genealogist Denise Hall and include talking points from seminars presented at Leadership Meetings. The newest file is a tutorial for correctly printing SAR electronic applications. I strongly recommend that those who prepare electronic applications take advantage of this tutorial.

**Graves Registration Corrections.** To correct graves registrations, the information should be sent to the Patriot Records Committee by email at [patriotgraves@sar.org](mailto:patriotgraves@sar.org) . Please click on the link Patriot Grave and Biographies Report and complete the attached Word document as a cover for the documentation. Staff genealogists are responsible for corrections that involve SAR applications, not graves registrations.

**Revolutionary Service and Religious Convictions.** Religious convictions prevented some from supporting the Revolution in ways that many others did. One of the most common was a conviction against bearing arms. Some could not swear an oath and as consequence would not swear allegiance to their state. The Revolutionary law makers were surprisingly sympathetic to religious convictions they did not personally share. In Maryland, Quakers, Dunkers, and Mennonites could and some did affirm, rather than swear, allegiance to the state. Justices, by law, recorded their names on lists distinct from lists of those who swore allegiance. Of course, some truly did not support the Revolution for religious reasons and would not affirm allegiance. There are several kinds of service that were performed by some members of these denominations.

- Providing supplies. Supplies were often pressed into service. Even a person who could not with good conscience provide supplies voluntarily to support the war would receive a voucher paying for supplies that were seized. SAR typically recognizes that an action as evidence of service rather than speculate about the motive for the action.
- Affirming or swearing allegiance. Some who would not bear arms would none the less swear allegiance. As noted above, Maryland permitted to be affirmed rather than sworn.
- Caring for the sick and wounded soldiers.
- Payment of taxes. Although some would not pay taxes that supported the War, others did, especially if the tax also supported non-military activities.

**The queue.** New applications are being reviewed about 6 weeks after they are received and supplemental applications about 12 ½ weeks after they are received.

I have very much enjoyed serving as Genealogist General for the last four years. During this time the SAR has moved forward in recognizing additional Revolutionary services based on well-established past precedents and has provided members with information about where evidence of service can be found. It has been exciting and rewarding to be part of this. Thank you for the opportunity.

## **Email #40 to State Points of Contact.**

7 June 2018

**How Stringent Is SAR for Evidence for Revolutionary Service?** Sometimes it appears that SAR is very narrow about what evidence is acceptable to prove Revolutionary service. SAR requires that an ancestor must be listed on a document proving service and is careful about what documents will be considered as service. Citing an undocumented family history or claiming your ancestor had militia service because he resided in Pennsylvania after the Militia Act of 1777 was passed, was able bodied, and between 18 and 53 is not sufficient evidence of service. However, SAR is generous in considering some facts as evidence of service. In particular, SAR often considers as evidence facts that show that people named were to provide Revolutionary service, but do not show they actually followed through. The following are examples:

- Militia class lists and other strictly organizational rolls. These rolls organize the militia for purposes of musters and drafts. They do not show that the men in fact attended a single muster. Documentation of militia fines or religious scruples against bearing arms can provide rebutting evidence that a man in fact did not serve even though he was listed on such a roll.
- Recommendations for commissions. Especially in Virginia, court order and minute books show that certain men were recommended for military commissions. These are accepted as evidence that a man served as a officer, even though he had not yet been commissioned. Sometimes a the man declined his commission or even died before the approval process was complete. Muster and pay rolls are relatively scarce, and many men recommended for a commission are not listed on an extant document.
- Jury summons. Jury summons, often recorded in court minute or order books, show only that a man was to be notified that he was to report for jury service. Subsequent records may show he was excused from service, fined for failure to report, or not found by the sheriff. Records of who actually served on a jury are scarce in comparison with summons.
- Road crew appointments. Court order and minute books often record the appointment of a man as overseer for a certain section of road and the men who were to serve and hands maintaining that road. They seldom, if ever, show that actual work was performed.
- Tax assessment lists. Assessment lists show that those listed were to be taxed on certain property, or owed a certain amount for their taxes. Assessment lists are far more common than payment lists. Other records may show that particular people were delinquent, rebutting the evidence provided by the assessment list.

You can see that such evidence of service can be rebutted with further evidence that service was not actually performed. Overall, however, if a record shows that a particular person was to provide service, SAR accepts the record evidence that the person listed did provide Revolutionary service if there is no further evidence that shows the person did not follow through.

**Pensioners on the 1840 Federal Census.** The 1840 federal census recorded the name and age of pensioners along with the households in which they resided. This information is a clue to Revolutionary service, but does not prove Revolutionary service. Pensioners listed on the census were not limited to those who served in the Revolution, but include those who served in other wars. For example, Samuel J. Chapman of Johnson County, Illinois is listed as a pensioner. The fact of the matter is that he was pensioned for service in the War of 1812, having sustained serious wounds in the Battle of Lundy's Lane. In the case of Chapman, his age of 46 in 1840 makes it obvious that he could not have served in the Revolution. This is an easy case. In some other cases one cannot tell from the age in what war a man served. Those preparing applications for SAR or registrations of graves can use this census information as a clue, but further research is necessary to prove that the service was Revolutionary.

**Genealogy Committee Position on a Proposal to Allow Adoption to Determine Lineage.** The Virginia SAR has proposed an amendment to the SAR Constitution to allow a man to be eligible for membership by descent from a patriot either by blood “or by legally decreed adoption.” The Genealogy Committee considered this proposal in a special teleconference meeting. The Committee voted 15-2 against the proposal. Several other members of the Committee who did not attend the meeting voiced opposition to the proposal in email discussion prior to the meeting.

The Committee did not find reasons offered for the proposal to be compelling and to some extent based on erroneous information. The Virginia Society offered as one reason that SAR “relies on official determinations of the sex of an individual, so determinations of relationships should also rely on official determinations of relationships between individuals.” The Trustees initially mandated that only certain official determinations could be used for determining gender, but on July 12<sup>th</sup> at Knoxville the Trustees voted to accept documents that establish the lineage of the applicant which also established that he is male. This extends acceptable evidence well beyond official determinations. If proof of lineage were to be limited to official determinations, Bible records, church records, obituaries, and numerous other long-accepted sources would no longer be acceptable. A second reason offered was that sometimes an applicant does not know he is adopted until after he has been accepted in SAR and the amendment would “remove any doubt” about his membership. In fact, there is no doubt to remove. Any man continues as a member if problems that were unknown to the him when he applied and was approved for membership subsequently arise with lineage or service. The line is closed for future membership, but those already approved on the line remain members. Another reason mentioned by some is that SAR is concerned with promoting patriotic, historical, and educational goals that are shared by those who can trace a lineage relying on adoption to a patriot. Many who do not have lineage by either blood or adoption to a patriot share these same goals. Following this reasoning, why have any lineage requirement?

Several reasons were offered in opposition to the proposal in the Committee deliberations. A goal of SAR is to promote fellowship among lineal descendents of Revolutionary patriots, where a lineal descendent is and has always been understood in SAR to be a bloodline descendant. The overwhelming understanding among lineage societies that a lineal descent is a bloodline descent. Among the lineage societies concerned with the American Revolution, the Daughters of the American Revolution, Children of the American Revolution, Sons of the Revolution, and Society of the Cincinnati all adhere to this interpretation. Daughters of the Cincinnati said the issue of adoption has never arisen for them. Other major lineage societies, including the Society of the War of 1812 and Society of Colonial Wars, also adhere to this interpretation.

Many adopted men are members of SAR through a bloodline connection to a Revolutionary patriot and have worked very hard to prove their bloodline lineage. Some men did this when they discovered they were adopted after becoming a member; others knew they were adopted before they joined and proved their bloodline lineage before applying. From my communication with a number of these men, I know they take special pleasure and pride in their success.

**Application Status.** 5,784 applications were received in 2017, of which 5,678 have been approved. This is an increase from 2016 of 299 applications received and 308 applications approved. 1,241 supplemental applications were received in 2017, 131 fewer than received in 2016, and 320 fewer than 2015.

New member applications are being reviewed about 6 weeks after they are received, and supplemental applications are being reviewed about 14 weeks after they are received.

## **Email #39 to State Points of Contact**

12 May 2018

**Use of a Proxy for a Y-DNA Test.** Recently several people told me that they thought an applicant had to take the Y-DNA test in order for the test to be used in proof of lineage. This is not the case. A standard technique is to find a proxy who descends on the straight male line under consideration, and for whom there is evidence acceptable to SAR that the proxy and the applicant share a common ancestor on that line.

Consider a specific example. I had approved supplementals on ancestors of the wife of Elisha Wilson (1800-1873). SAR recognized my descent from Elisha when it approved those supplementals. I had circumstantial evidence that Elisha was the son of Joel Wilson and solid evidence that Joel was the son of Pvt. Elisha Moore Wilson of NC, but the evidence was not quite strong enough for me to move forward with a supplemental. Taking a Y-DNA test myself would not help me identify the father of Elisha because Y-DNA tests require a straight male bloodline. There are two women in my bloodline back to Elisha and his wife. I located a man who could prove his descent Elisha Wilson on the straight male line. He agreed to be my proxy for a Y-DNA test. The report showed that only one Wilson in the data base matched my proxy. That man could prove his descend from Elisha Moore Wilson. (In fact, he and his son subsequently joined SAR on the services of Elisha Moore Wilson.) He descended not from Joel, but a man who could be proven to be a brother of Joel.

The proof did not end here, however. Was there reason to believe that Elisha was not the son of one of Joel's brothers? The answer was affirmative. Only Joel moved to Tennessee and resided in the county where Elisha married as a young man. All of Joel's brothers remained in North Carolina in the vicinity of where their father served in the Revolution. Furthermore, all of Joel's brothers died testate or left probate records distributing the estate. My Elisha shared in none of those estates. Evidence was strong that Elisha was not the son of a brother of Joel.

The following steps were important in using Y-DNA evidence, along with other evidence, in establishing the relationship to a possible ancestor.

1. Find and provide documentary evidence that you descend directly from a particular man.
2. Find and provide documentary evidence that a man serving as your proxy descends on the straight male line from that particular man.
3. Identify a man or men for whom there are Y-DNA matches with the proxy.
4. Find and provide documentary evidence for the lineage those matching the proxy, and for the relationship of a man in their ancestry to the particular man from whom you can prove your descent.
5. Find and provide documentary evidence that you do not descend from a close male relative of the particular man you are trying to prove.

**Daughters of the Revolution of 1776.** We are all familiar with the Daughters of the American Revolution, but there was a second organization for women who descend from patriots of the American Revolution. This society was organized in 1891 and disbanded in 1983. Its records are in the Suffolk County Historical Society (New York) and applications can be ordered for \$10. Those applications are not acceptable to the SAR as evidence of lineage or service, but may none the less provide leads for proving service or lineage. The German Genealogy Group has indexed the patriots and members: <http://www.germangenealogygroup.com/records-search/daughters-of-the-revolution.php> A link to an order form for applications is also at that page.

**Entry of Citations on Applications.** The SAR membership application form has evolved over the years to allow more space for citing of references that prove lineage to a patriot and service of the patriot. In the early 20<sup>th</sup> century four lines were dedicated to references to authorities—lineage and service combined. Later with many applicants serving in World War II, no lines were dedicated to lineage, 4 to service of the patriot, and 9 to service of the applicant. When I prepared my application in 1982 there were precisely 2 lines available per generation for lineage citations and 3 for service of the patriot. This led to very terse citations on old applications. It is frustrating when a citation is so terse one cannot identify the record provided and its source, especially when the application is one's own!

The Blackstone on-line application system allocates space for citations dynamically. If you enter one line for the citations for a generation or for the patriot's service, one line is allocated; if you enter ten, ten are allocated. Unfortunately, the system is not clever enough to condense unneeded space within a citation. In some cases, sometime each source is started on a new line within the citation; in other cases blank lines are entered at the end or even in the middle of the citation. In the following example there is unnecessary space for these reasons:

b/c's-John Doe, Rachel Roe  
d/c-John Doe

m/c-John Doe to Rachel Roe

Staff likes the use of semicolons to separate different records within a citation and the deletion of blank lines. The citation above can be condensed from to a single line:

b/c's (John Doe, Rachel Roe); d/c (John Doe); m/c (John Doe to Rachel Roe)

Failure to condense citations is frequently forcing applications prepared using the Blackstone application system to an unnecessary extra page. There is no policy against unneeded extra pages (and certainly no policy against pages beyond the second when needed), but unnecessary pages take more file space (which is becoming tight) and applications that appear ugly. Please eliminate unnecessary space from applications.

**The queue.** New member applications are being reviewed about 6 weeks after they are received. Supplemental applications are being reviewed about 15 weeks after they are received.

## **Email #38 to State Points of Contact**

12 April 2018

**Is that Book Acceptable as Evidence?** The question of whether a book is or is not acceptable as evidence arises frequently. The Genealogy Committee Policies sums up what constitutes an acceptable source in Section 3.5002:

In essence, admissible documents must trace information back to an acceptable source, either a person in a position to have knowledge of the facts presented or an institution such as a government body or church that kept records.

(See Section 3.5000 and subordinate sections for details on admissible and inadmissible information.) In many cases a one can trace some information in a book back to an acceptable source, but cannot trace other information back. As a result, a book may be acceptable for some information but not other claims found in the work.

**Public Service Claims in New Jersey and New York.** Providing supplies and other public service is an important evidence that men and women provided Revolutionary service. Indeed, this and payment of taxes that supported the Revolution are the main sources of evidence for service of women.

Records of New Jersey public service are found in several locations. The records of Deputy Quartermaster General John Neilson Sources are one important source. These are found the Special Collections of the Alexander Library, Rutgers University. The New Jersey State Archives has public service claims, especially among the records of the New Jersey Department of Defense. Fortunately, records from both of these sources have been abstracted in *Certificates and Receipts of Revolutionary New Jersey* by Dorothy Agans Stratford and Thomas B. Wilson (1996). Unfortunately, the book is out of print and copies appear to be scarce.

Records for New York public service are available on microfilm, *Revolutionary War Accounts and Claims, 1775-1808*, Series A0200. These records are from the Office of the Comptroller of the state of New York and include records for both military and civilian service. A description of the records and detailed information about the content on each of the 42 reels of microfilm can be found at

<http://iarchives.nysed.gov/xtf/view?docId=ead/findingaids/A0200.xml> .

The records in this series were damaged and partially destroyed by fire in 1911. Some were published prior to the fire in *New York in the Revolution as Colony and State, Vol. II* (1904), which is available on line at

<https://archive.org/details/newyorkrevolution02statrich> .

Public service claims for Maryland were discussed in Email #34, for North Carolina in Email #36, South Carolina in Email #25, and Virginia in Email 24.

**New DAR Director of Genealogy.** Our sister organization has named Sara Sukol as Director of Genealogy. Sara had served 18 years in the DAR Genealogy Department.

**Militia fines.** I have been asked for my assessment of two different cases involving militia fines within the last week. A review of policy seems to be in order. Militia fines are covered in Genealogy Committee Policy 2.4001. A militia fine nullifies previous service if and only if it is for an act of disloyalty or egregious failure of duty. Although SAR does not have guidelines for such serious offenses, I view failing to report for active duty when drafted or desertion as examples of egregious failure of duty. In some cases a militia fine can provide evidence of military service. In addition to requiring that the offence not have been an act of disloyalty or egregious failure of duty, the policy requires that the fine that the soldier must have been on duty in order to commit the offense for which the fine was imposed. Missing a muster would not qualify as evidence of military service because the soldier would not have been on duty to commit the offense. By contrast, attending a muster without proper equipment would provide evidence of military service. Samuel Paxton and David Allison of the Augusta Co., Virginia militia were fined for not having their bayonets, an offense not so great as to amount to an act of disloyalty or egregious failure of duty.

**Record Copies from DAR Electronic Application System.** As reported in Email #32, the new DAR electronic application process produces record copies of applications without verification marks by the reviewing genealogist. Only claims that have been verified by the DAR are contained on these new DAR electronic applications. Claims judged to be unproven or incorrect must be deleted, supported with accepted evidence, or corrected before the application is even accepted by the DAR. Record copies, both for old applications and the new ones prepared using the electronic process, are readily identified by the cover sheet produced for all DAR record copies. Record copies of applications produced with the new electronic process will also have an approval block near the end of the application that includes the date verified, approved by the National Board, and the signatures of the Registrar General and Recording Secretary General. Draft applications, not acceptable to SAR, will not have an ancestor number or a member number.

**New SAR Staff Genealogist.** SAR has hired Pam Kalbfleisch to fill the vacancy left by Debra Renard and will begin about 17 April. She will work 24 hours per week, initially on both new member and supplemental applications. Pam is the Assistant Registrar of the Corn Island Chapter DAR, where our own Susan Julien is Registrar. Pam joined DAR on the service of Capt. Samuel Cochran of Virginia. She is also a member of the National Genealogical Society and the Kentucky Historical Society. Pam is enrolled in a Boston University genealogy program and expects to complete the requirements for a Genealogy Research Certificate in May.

**The queue.** New member applications are being reviewed about 5 ½ weeks after they are received at National, and supplemental applications about 17 ½ weeks.

## **Email #37 to State Points of Contact**

9 March 2018

**Spring Leadership Meeting.** I attended the Spring Leadership Meeting in Louisville last week. Unfortunately, I developed a cough and had to leave Saturday morning before business came before the Trustees. My report on Trustee activity is based on information from others, rather than my personal attendance.

**Use of Old Application Forms.** March 1<sup>st</sup> had been set as the deadline for forms received at National to comply with requirements previously set by the Trustees. Of the four forms in widespread use—Blackstone, Cox, PDF, Word—only Blackstone does not fully comply with requirements set by the Trustees. The signature line for the Genealogist General is to be of the following format, enabling the reviewing staff genealogist to initial and be readily identified in questions later arise:

Genealogist General: \_\_\_\_\_ By: \_\_\_\_\_

The form produced by the Blackstone system omits “By:”. I instructed staff to pen this in until it could be fixed in the system. The Trustees, I am told, voted to extend the submission old forms until 2 March 2019. A number of applications on obsolete forms continue to be received even though new forms that comply with the Trustee’s requirements have long been available. This has some unfortunate practical consequences. For example, we are likely to adopt a policy for redacting record copies so sensitive information is not released about living people. If an old form listing children of the applicant is submitted, redaction would be required for an additional generation and make the production of record copies less efficient. You can find the latest version of each form at:

<https://sar.org/application>

***Please use current forms.***

**SAR Genealogical Research System (GRS).** “A Conceptual Overview of The Sons of the American Revolution Genealogical Research System” was distributed with Email #35 and comments were invited. It is very important that the Committee receive comments from major stakeholders, including chapter and state registrars. Registrars will be important users of the SAR GRS. GRS Committee chairman Jim Engler has received comments from some of you. Comments from additional registrars would be most welcome. Both the Genealogy Committee and the Patriot Records Committee endorsed the conceptual overview, and President General Guzy commented favorably on the methodical approach of identifying stakeholders and seeking their comments.

**Expired Applications.** Applications that have been pended for three years expire unless an extension has been granted or an appeal is in process. Many states retrieved expired applications and documentation at the Leadership Meeting, but the following states did not: Colorado, Georgia, Illinois, Indiana, Kentucky, Louisiana, Massachusetts, New Jersey, New York, North Carolina, Oregon and South Carolina. Under policy, expired applications and documentation will be shredded after the Leadership Meeting following expiration. If any of these states wish to arrange for the return of some or all of the expired material, please notify Patty Riemann ([preimann@sar.org](mailto:preimann@sar.org)) by 30 March.

**Patriot Research System.** The Patriot Records Committee has released the Patriot Research System, replacing the old Patriot Search. This is available at <http://sarpatriots.sar.org/>.

A link can be under the Genealogy drop down menu. Many of the glitches in the old Patriot search are now fixed, although much data remains to be entered. The new system supports Patriot, Member, Descendant, and Biography searches. The Patriot Records Committee and its volunteers deserve thanks for their remarkable progress with limited financial and staff support.

**Names of female patriots.** The Genealogy Committee made two recommendations to the GRS Committee:

1. The NSSAR Genealogical Research System accommodate searches both on maiden names and on multiple married names of female ancestors.
2. That searches on maiden names and multiple married names should be available with respect to all generations, and not just to that of the patriot ancestor and spouse.

Analyzing a narrow problem led to better understanding a broader issue. The initial problem was that the Blackstone Application System identified a female patriot by what was entered as her maiden name in the lineage section of the application. For example, my patriot ancestor Mrs. Ruth Bundy was identified as Ruth Jennings when I prepared a test from my old, approved application. She would not be found under a search for either Ruth Bundy, the name under which the service is recorded, or a surname search of Bundy. I did not even know her maiden name until I was doing the final research for my supplemental on her service. I do not know the maiden name of my patriot ancestor, Mrs. Elizabeth Young. She would be identified as Elizabeth -?- if policy if followed for entering an unknown maiden name on an application. We will have a lot of unrelated female patriots with the surname -?- unless we require that the married name of women be searchable.

This led to a recognition that when a woman married more than once, it is desirable to have all names searchable, especially if she had children by more than one husband. One of my female patriots had children by two husbands. Descendants of both should be able to find that she was a patriot from the SAR GRS. The subcommittee realized that the issue was not limited just to female patriots, but for any generation enabling descendants by different husbands to discover their lineage from the GRS would provide more membership opportunities.

The GRS Committee will assess the feasibility of addressing these issues and make appropriate recommendations for the application form to the Trustees.

**Departure of Debra Renard.** Debra Renard's expertise and reputation in DNA genealogy has continued to grow and she was made an offer that SAR could not come close to matching. She is leaving SAR this coming Monday, 12 March. She had established herself in SAR as a meticulous and helpful genealogist. She will be missed.

**The queue.** New member applications are being processed about 6 weeks and supplemental application about 17 ½ weeks after they are received.

## Email #36 to State Points of Contact.

24 February 2018

**North Carolina Revolutionary Pay Vouchers.** The Revolutionary Pay Vouchers in the North Carolina State Archives provide an important source for evidence of Revolutionary service. Fortunately, images of these vouchers are on line at familysearch.org. They can be found at <https://www.familysearch.org/search/collection/1498361> or through a Google search on “North Carolina Revolutionary Pay Vouchers.” Pay vouchers can be searched by name and then browsed moving forward or back from the image on the screen. Although the names are indexed, a spelling variation can result in failure to find any record. One of my ancestors, Isaac Dorris, is indexed with the given name “Is” because a cancelation hole was punched in the voucher through the last part of his first name. A search for Isaac Dorris returns a message that no records were found. Searching just the surname worked. Another way to find vouchers at familysearch.org is to select the Records from the Search drop down menu. Search for the ancestor’s residence for a period that includes the Revolution.

**North Carolina Records On-Line—State Archives of North Carolina.** The North Carolina State Archives has posted some important records on-line. The home page is <http://digital.ncdcr.gov/cdm/home>

Collections important to SAR members and applicants include:

- Tax Lists and Records. These are records of the General Assembly, Treasurer and Comptroller, and the Secretary of State. They do not include tax lists from county records and the Archives does not plan to post these. The Subcommittee on Revolutionary Taxes is preparing report on these lists.
- Secretary of State Wills. These are loose wills from 1663 to 1789. Most wills after 1760 will be found among county records, rather than among the records of the Secretary of State.
- Troop Returns. These records date between 1747 and 1893. The lists can be narrowed to the Revolutionary period, defined by the Archives as 1763-1789.
- North Carolina Newspapers. These range from 1753 to the 1890’s. Browsing can be organized by location.

**Subcommittee on Revolutionary Tax Lists.** The Subcommittee on Revolutionary Tax lists has made an initial determination of which Revolutionary tax lists posted by the State Archives of North Carolina provide evidence of Revolutionary service. The following lists provide evidence of Patriotic Service, excepting those named as tax exempt or charged a penalty for not complying with the law (such as not taking the oath of allegiance or returning an inventory of their taxable property).

County	Year	Collection	County	Year	Collection
Dobbs	1780	General Assembly	Halifax	1782	General Assembly
Caswell	1780	General Assembly	Montgomery	1782	General Assembly
Granville	1780	General Assembly	Nash	1782	General Assembly
Northampton	1780	General Assembly	New Hanover	1782	State Treasurer/Comptroller
Bertie	1781	General Assembly	Pasquotank	1782	General Assembly
Gates	1781	General Assembly	Pasquotank	1782	State Treasurer/Comptroller
Brunswick	1782	General Assembly	Surry	1782	General Assembly
Camden	1782	General Assembly	Wilkes	1782	General Assembly
Granville	1782	General Assembly	Halifax	1783	General Assembly

Three 1779 lists not mandated by a law supporting the Revolution provide indirect evidence that many listed took the oath of allegiance. The Beaufort and Randolph lists identify some as being charged with a three or four times the tax “assessed on persons in this State who comply in every

respect with the laws thereof.” Those who did not take the oath of allegiance were among those charged three and four fold the regular rate. The Randolph list identifies various taxpayers as not having taken the oath [of allegiance], as Quakers, or not having “given in” their estate. All of these lists provide indirect evidence that those not singled out took the oath of allegiance.

County	Year	Collection	County	Year	Collection
Beaufort	1779	General Assembly	Randolph	1779	Secretary of State
Craven	1779	General Assembly			

**North Carolina Revolutionary Tax Lists at Familysearch.org.** I reported in Email #30 that Familysearch was digitizing microfiche and microfilm records. Some Revolutionary tax lists from the Revolutionary period have been converted and are now available on-line. Among these are Pasquotank and Rowan county lists in the State Archives of North Carolina. To locate digitized records available on line at familysearch.org, select Catalogue from the dropdown menu for Search and then select Place. Enter the location you wish to search, such as “United States, North Carolina, Pasquotank” and click Search. You can then scroll to see the various kinds of records for the county. If you click on Taxation, you can see what tax records are available. You may well see an item, “Tax Lists for Various Counties of North Carolina.” The entries here are incomplete. For example, Rowan Revolutionary tax lists are on line, but not named here. Look for an author who would have created the lists, such as “North Carolina. County Court of Pleas and Quarter Sessions (Pasquotank County)” and click on that record. A small camera icon on the right indicates that the record is on line and you can access it by clicking on the name of the record. A small microfilm reel icon indicates the record has not yet been digitized.

Many other county records are available on line at familysearch.org and can be found this way.

**New Version of Application Preparation Manual.** A new version of the Application Preparation Manual is now available at sar.org with new changes in red. A link can be found under the Genealogy dropdown menu under Genealogy Policies and Materials, or go to <https://members.sar.org/media/uploads/pages/77/hu8LaHnCsV4f.pdf>

The major change is the addition of about 3 ½ pages on DNA evidence.

**Spelling of Patriot’s Name.** Variation in the spelling of surnames demonstrates the creativity of the Revolutionary generation, but can cause problems for applicants. The Application Preparation Manual states,

The Genealogy Staff usually uses the spelling found on the Service record. However, if a different spelling is used, a note needs to be submitted indicating which spelling the Applicant wants on his certificate. [p. 1]

I have instructed staff genealogists not to follow automatically the DAR spelling of surnames. DAR, for indexing purposes, has made spellings uniform even if a family never used the spelling they have adopted. My Goodall family of Virginia never spelled the name “Goodale,” but DAR renders it that way without any claim that the spelling is “correct.” The SAR GRS will need to adopt a similar standardization so that users can find all applications concerning a family without having to initiate searches for each reasonable variation of a name.

**Staffing.** Jeff Bell is leaving SAR for the second time. He has assumed a position at Bellarmine University. Jeff worked in several different departments, including Genealogy, since returning from Homeland Security. He continues to work limited hours in Office of the Registrar.

**The queue.** New member applications are now being processed about 6 weeks after they are received at National, and supplements about 17 ½ weeks after they are received. As expected, the backlog that builds after Thanksgiving through the new year is being reduced.

## Email #35 to State Points of Contact

14 January 2018

**Illinois Service.** Few had ancestors in Illinois at the time of the Revolution. Two books compiled by Clarence W. Alvord provide documentation for Revolutionary service in present-day Illinois: *Cohokia Records, 1778-1790* (1907) and *Kaskaskia Records, 1778-1790* (1909). These are on-line at:

<https://archive.org/details/cahokiarecords1702caho>

<https://archive.org/details/kaskaskiarecords00kaskrich>

They are also at ancestry.com and in the SAR Library. Although primarily about Illinois, there is information about Vincennes.

**Genealogical proof arguments.** Some have asked for guidance on how to present a proof argument, a “detailed, written explanation of the evidence and reasoning used to reach a conclusion.” [Genealogy Committee Policy Manual, Section 3.2000] This is not to be confused with the 5 point Genealogy Proof Standard [Section 3.0000], which covers such matters as the search for evidence. However, unlike a journal, the documentary evidence is presented to the staff genealogists rather than merely cited. I myself like to present an overview if the argument is complex, that cite one or more documents that support each separate point in the argument, stating what those documents prove. Here is an example.

### **Overview of the Argument.**

Dr. William D. Dorris was in a position to personally know William Dorris (Jr.) and Isaac Dorris.

He identifies them as brothers of his own grandfather, Joseph Dorris. William Dorris (Jr.) was a son of William Dorris (Sr.). Therefore, Isaac Dorris was a son of William Dorris (Sr.).

### **William D. Dorris Tombstone, Nashville City Cemetery, Nashville, Davidson County, TN; Dorris, William Dawson, “Dr. W.D. Dorris Narrative,” manuscript started in 1879, pp. 2, 6, 7, 9.**

Dr. William Dawson Dorris was born in 1802 and died in 1892. He placed the residence of his father, John Irwin Dorris, in Robertson County in 1818 (p. 6, 7) at the time that Joseph Dorris, Dr. Dorris’ grandfather, died. He says that his father moved to Nashville [Davidson County] in 1820 (p. 9). Numerous maps show that Robertson and Davidson Counties are adjacent to Sumner County.

### **Affidavits of William Dorris (Jr.) & Solomon Brown, William Dorris Pension File (W-916), pp. 4-6, 12.**

William Dorris (Jr.) moved to Orange County, North Carolina shortly after the Revolution and then Sumner County, Tennessee where he died in 1842. Sumner County is adjacent to Robertson and Davidson County. Dr. William Dawson Dorris was in a position to know William Dorris (Jr.) personally.

### **1820 Robertson County Census, p. 121; Robertson County Minute Bk. 7, pp. 564, 571.**

Isaac Dorris resided in Robertson County in 1820 and died there in 1824. Dr. William Dawson Dorris was in a position to know Isaac Dorris personally.

### **“Dr. W.D. Dorris Narrative,” manuscript started in 1879, pp. 2 (with other pages, above).**

Dr. William Dawson Dorris identifies William (Jr.), Isaac, and Joseph Dorris as brothers.

### **Orange County, North Carolina Minute Bk. 5, 4<sup>th</sup> Monday [23] November 1795 [pages unnumbered in the book].**

Letters of administration for the estate of William Dorris (Sr.) were granted to “Mary Dorris the Widow &c. and Wm Dorris the sun &c.....” Because William (Jr.) and Isaac Dorris were brothers and William (Jr.) was a son of William (Sr.), Isaac was a son of William (Sr.).

The documentation is presented in the same order as the citations in the proof argument. If a document has already been presented, I include in the citation a remark to show where it was presented.

**Genealogical Research System (GRS).** The GRS Committee has been meeting almost weekly by teleconference. The Committee will eventually develop one or more Requests for Proposals (RFPs), but there is much work to be done before we reach that stage. The SAR GRS will be a computer-based system for the capture, storage, search and retrieval of records and documents about Revolutionary patriots, their life, service, and burial, and the lineage of members of the SAR to Revolutionary patriots. The GRS will use three sources of SAR data: approved SAR membership applications and supporting documentation; Revolutionary grave registrations; and patriot biographies. The Committee has heard loud and clear that members and staff want capabilities like what the DAR provides for data from its approved applications and supporting documentation. A copy of “A Conceptual Overview of The Sons of the American Revolution Genealogical Research System” is attached. The Committee has also developed an initial draft of specifications for the GRS, a discussion of stakeholder concerns and tasks, and a discussion of security issues, but those are not ready for general release. The Committee is interested in the views of stakeholders. This message, directly and indirectly, reaches state and chapter registrars and genealogists. You can send comments to GRS Chairman, Jim Engler, at [j.f.engler,1@gmail.com](mailto:j.f.engler,1@gmail.com), identifying your position. If you choose to comment in the document itself, please use the Track Changes or the Comment feature of Word.

**Expedited Processing.** Requests for expedited processing are to be sent to the Executive Director, Chairman of the Genealogy Committee, and the Genealogist General, who comprise a panel that reviews requests and decides which requests are granted. A number of states continue to send requests for expedited processing to Jon Toon in the Office of the Registrar, which he must then forward. This merely delays consideration of the request and creates extra work for the Office of the Registrar. Requests must be made by the applicant, a sponsor, state registrar, state secretary, or state president. For further details, see Section 6.4000 of the Genealogy Committee Policy Manual. Would registrars please make this known to the presidents, who do not receive these emails directly and are often not familiar with the Manual.

**Staffing and the Queue.** Jeff Bell has returned to SAR from Homeland Security. Jeff is in a floater position. Much of his recent time has been in departments other than Genealogy, but he is doing some genealogical work. I was misinformed about Debra Renard's hours. She is working at least 30 hours each week, but generally not as many as 36. New member applications are now being reviewed about 5 ½ weeks after they are received, already dropping after the annual increase from the holidays. Supplemental applications about 20 weeks after they are received.

## Email #34 to State Points of Contact

26 December 2017

**Privateer Service.** *Naval Records of the American Revolution* (1906) includes a 280 page section on bonds for letters of marque, organized alphabetically by ship. The records give the state and the names the owners, bonders, witnesses, and sometimes the master and mate of the vessel. Although bonders and witnesses are not mentioned in the policy dealing with privateers, Genealogy Committee Chairman Falkinbury and I are in agreement the acts performed were essential for issuing letters of marquee and they were acts of patriotic service. Names of individuals can be found in the index. This volume can be found on-line at:

<https://archive.org/details/navalrecordsrev00congrich>

**Maryland Service.** Recently a state registrar asked me for a source for certain Maryland service. A quick summary of some major sources for different kinds of Maryland service may be useful. A source for Maryland privateer service is given above. I am limiting the sources to those that cover all or most of the state, rather than a particular county.

**Tax Lists—**For each year and jurisdiction, a Maryland tax list providing evidence of patriotic service has been posted by the Maryland SAR at their website:

<https://www.mdssar.org/membership/marylandtaxlists>

**Military service—**There are readily available several sources for Maryland military service during the Revolution.

- Military service and pension records in the National Archives—available on-line at [fold3.com](http://fold3.com), a commercial site.
- Archives of Maryland—published Maryland records now available on-line at <http://aomol.msa.maryland.gov/html/volumes.html>  
See especially Vol. 18 for rolls of the Maryland continental units. Also relevant for Maryland service, including civil service, are Vol. 11 for records of the Maryland Convention, Vols. 11, 12, & 16 for Council of Safety, Vols. 16, 21, 45, 47, 48 for the Council of Maryland, and Vol. 78 for the Maryland Conventions.
- Militia rolls—S. Eugene Clements and F. Edward Wright published abstracts of rolls from the Maryland Historical Society and the Maryland State Archives in *The Maryland Militia in the Revolutionary War*.
- Public Service Records—Harry G. Peden, Jr. has gathered from several sources public service records and published abstracts in *Maryland Service Records, 1775-1783*. Some of the records could be for payment of taxes in commodities rather than selling supplies, but all provide evidence of service.
- Oaths of Allegiance—Original records for many Maryland oaths of allegiance are divided between the Maryland Historical Society and the Maryland State Archives. The Maryland Historical Society holdings and references for some published lists can be found at <http://www.mdhs.org/findingaid/oaths-fidelity-or-oaths-allegiance-1775-1778-ms-3088>  
The card catalogue in the Maryland State Archives includes both those who took the oath of allegiance and those who were recorded as not having done so. Baltimore and Harford County men who did not take the oath are included, and there may be others. Some publications, including Bettie Sterling Carothers' *Maryland Oaths of Fidelity*, relied on this source and are not acceptable as evidence of service.

**Multi-state Family Plan Applications.** Concern has been raised about multi-state family plan applications, especially new member applications. Chancellor General Davis Wright advised that my guidance in Email #30 was too weak, that the chapter and state not transmitting a new member application should be more than merely be informed. Under the Bylaws those states have the right to determine suitability of an applicant for membership. Supplemental applicants are already members, to this issue does not arise for them. Chancellor General Wright did the heavy lifting in preparing a form that will help protect the rights of chapter and states. A copy is attached. This is not an official form. Thank you, Davis.

**Assessment of IT Projects.** The independent assessment of the membership database project and related modules approved by the Trustees is complete. A special Internal Audit Committee reviewed the report by Protiviti and prepared its own report in non-technical language. The Committee found the concepts were good, but requirements gathering failed to include many key users, documented requirements were lacking, quality control was lacking, funding has been irregular, incomplete modules have been released, and proper testing was not been conducted before modules are released for general use. The Committee recommendations included that the oversight and management be addressed immediately, with a nimble management structure put in place, real and detailed requirements be developed for every module, and the current modules assessed against those requirements. I myself would go a step further: professional assessment of the code is needed to determine the extent to which the modules can be maintained and provide a foundation solid enough on which to build for the future.

**Changes in Genealogy Department.** Genealogist Jeff Bell has left SAR to work for Homeland Security. Jeff is a retired detective and law enforcement was in his blood. We wish him well in his new position. Jeff has been replaced with a new employee, Brendan Potter. Brendon is a member of the Governor Isaac Shelby Chapter SAR in Kentucky. He very enthusiastic about working in genealogy. In addition, Debra Renard's hours have increased from about 32 per week to about 36 per week. The staffing in Genealogy is:

New Member Applications

Jessie Hagan	40 hrs./wk.
Denise Hall	40 hrs./wk.
Brendan Potter	40 hrs./wk.
Debra Renard	36 hrs./wk.

New Member and Supplemental Applications

Beverly Hicklin	24 hrs./wk.
Susan Julien	32 hrs./wk.

Supplemental Applications

Leslie Miller	24 hrs./wk.
Patty Riemann	40 hrs./wk.

Staffing in the Genealogy Department has increased about 88 hrs./wk. in 2017.

**Application Status.** Through November 30<sup>th</sup>, 4,167 new member applications had been received, 57 more than all of 2016. Of those, 594 were junior applications, 136 more than all of 2016. 1,136 supplemental applications had been received through November 30<sup>th</sup>. In 2017 the staff has worked on 6,140 applications as of December 21<sup>st</sup>, approving 5,980 and pending 160. This includes 2016 applications that had not been reviewed until this year, and earlier pended applications for which new information was submitted. As of the 21<sup>st</sup>, new member applications were being reviewed about 5 ½ weeks after they were received, and supplemental applications were being reviewed about 19 weeks after they were received. We are at the time of the year when genealogy staff vacations always cause a jump in the backlog. However, at this time last year the lag was about 12 ½ weeks for new member applications and 22 weeks for supplementals.

## **Email #33 to State Points of Contact**

11 October 2017

**Status of Cox Software Modifications.** Ray Cox is making good progress on modifications to Cox Application System. The changes required by the Trustees, as well as other changes to facilitate loading a data base for use by a GRS, may be complete as early as the end of November. These changes are made at no cost to the SAR.

**Genealogy Decisions at the Fall Leadership Meeting.** The Genealogy Committee amended Policy 6.0001 to require all applications to be on forms that have been updated to discontinue the section on children of the applicant, include a certification that applicants meet the basic membership requirements of the SAR Constitution, and include signature space for the Genealogist General (or his staff representative). The effective date for this policy brought the policy manual up to date with previous decisions of the Trustees at the Spring Leadership Meeting and at Congress in Knoxville. Later a motion was passed to recommend to the Trustees that the deadline be extended to the Spring 2018 Leadership Meeting if necessary, in case the Cox software was not updated by the deadline. (The Committee did not have current information on the status at the time.) The motion was made to the Trustees to extend the deadline to 1 March 2018, but the motion omitted the words “if necessary.” An amendment to add those words was defeated. The main motion passed, but as a result of the defeat of adding “if necessary” obsolete forms can remain in use 3 months longer than needed.

The Genealogy Committee deferred other proposed amendments to genealogy policy to the Spring Leadership Meeting.

The Genealogy Committee appointed two subcommittees. One will address the issue of how the names of female patriots should be represented on the application and entered into a data base that will support a Genealogical Research System (GRS). The Blackstone Application System captures the name of the patriot from the lineage section of the application, so a female patriot whose maiden name is unknown is rendered in a form such as “Mary -?-” and her married name omitted. There is strong feeling that the maiden and married name(s) should be searchable in a GRS. A second subcommittee was appointed to consider expanding policy to recognize participation in tea parties in addition to Boston as acts of Revolutionary service.

**Information Technology (IT) Decisions at the Fall Leadership Meeting.** The Genealogical Research System (GRS) Committee met at Spring Leadership and made a number of modifications to a draft document on GRS stakeholders. This Committee has been meeting weekly by teleconference. A number of guests attended the meeting and found it really different from the meetings of Committees that do not meet between leadership meetings. Many broad decisions about scope and direction had already been made by the Committee and were not discussed at the Louisville meeting. As a result, guests observed a discussion of details in part of a draft document, with essentially no discussion giving them an overview.

The Trustees voted unanimously to inform Blackstone that the contract for IT services is not to be renewed automatically. The contract expires in February, but notice not to renew must be given in December. The Trustees approved a contract to assess the status of our IT assets. This is important to move forward on IT systems.

**Use of the Draper Manuscripts to prove Revolutionary service.** Lyman Draper (1815-1891) collected information on the Revolutionary war and the settlement of the west. He compiled the documents into volumes of related material which he bequeathed to the Wisconsin Historical Society. The collection is on 123 reels of microfilm and is widely available at research libraries. Information about this collection can be found at: <https://www.slcl.org/sites/default/files/Draper%20Manuscript%20Collection%20guide.pdf> and <https://www.slcl.org/sites/default/files/HG16%20Draper%20Manuscript%20Collection.pdf>

Some accounts in the manuscripts are merely tradition and do not prove service. In other cases, they do provide proof of service. Some accounts can be traced to eye witnesses. Some official records can also be found in the collection. In one case, the manuscripts confirmed the identity of a soldier by providing the names of the two creeks where men were recruited. Although several men of the name resided in the state, only one was found in the recruiting area. In another case a defender of the frontier was established from a letter by a man who gave an account of the death of that defender. The author of the letter was in a party that found the body of the defender and the tracks of the Indians who killed him. The manuscripts can also bring life to otherwise dry facts. From South Carolina audited accounts I knew that one of my ancestors served in the militia. From an account of a sergeant, I learned that men were given whiskey from a keg seized from a Tory to encourage enlistment.

**Revolutionary Taxes.** Copies of Revolutionary tax lists found the New York State Library have delivered to the SAR Library for posting. Lists from the New York State Archives were previously posted. All New York lists that provide evidence of service are already posted at the Empire State SAR website. Obtaining the lists from the Library was made possible by a grant from the George Washington Endowment Fund.

William Schwetke of the Virginia SAR has joined the Subcommittee on Revolutionary Taxes. He replaces Tim McCabe of DC SAR, who stepped down after years of excellent service.

**The queue.** New member applications are being reviewed about 4 ½ weeks after they are received at National, and supplemental applications are being reviewed about 26 weeks after they are received at National.

## Email #32 to State Points of Contact

25 August 2017

**Applications are not limited to two pages.** Several chapter registrars have recently encountered applications that print on three pages. This is permissible and not a problem. All pages must be printed on the SAR bond, watermarked paper. The Blackstone Application System will automatically print applications on however many pages are needed. Users of the Cox Application System or the Word or PDF forms can add pages to continue the lineage or citations on additional pages, even with those pages following the signatures at the bottom of the second page. A 13<sup>th</sup> generation, if that is the last generation, should be in the same format as the 12<sup>th</sup>. Staff genealogists have requested that page breaks in Blackstone system application not separate closely related information onto different pages. In the meantime, a workaround to conform to staff preference is to insert blank lines at the end of the last citation that belongs on a page to force a break.

Blackstone users can sometimes avoid a third page. They should check to make sure they did not add blank lines in the sections for citations. They can also separate different sources with a semicolon instead of placing each citation on a separate line.

**Use of Old Local and Family Histories.** Old local and family histories were not written in a style that would be used by a professional genealogist today. The text often does not identify explicitly who provided the information, regardless of how well researched the book is. Do not ignore these older books. They may provide the only evidence connecting two generations that you can find. Careful analysis of the work may reveal the identify of a source not explicitly named who was in a position to know the fact. The analysis must be explained in writing with evidence presented to support the analysis.

Policy 3.5002, Documents admissible in evidence, states, “In some cases, a publication will not identify the source of information explicitly, but the source can none the less be determined.” This is reinforced in the exception in Policy 3.5004 which includes as inadmissible “Published accounts, including family histories, local histories, biographical dictionaries, and newspaper articles which are not contemporary with the persons or events being reported, *unless sources that are admissible can be determined* [emphasis added].” It is not the case that a book must be documented with a footnote for each fact in order to meet SAR standards for considering information as evidence.

So how does one determine the sources used in old family and local histories where sources are not explicit? One can look for a number of things, and like many proofs using indirect evidence, sometimes more than one fact needs to be found for the identity of the source to be convincing.

- During what period of time was the research for the book done? This is important in determining who could and could not have provided information for the book.
- What does the author say about the methodology used? In a case recently appealed to me as Genealogist General, the author of a short family history wrote, “I interviewed the few remaining older people and noted the facts they remembered.” The author did not say “some” or “several,” but rather “the few.” One very elderly lady outlived the author. She was identified as a sister of a man whose father needed to be proven and was in a position to know her brother and her parents.

- Look for differing levels of detail about different branches of the family and members of the branches. In one case specific dates of birth, marriage, and death were provided for only a few people. It was relatively easy to determine who from that branch of the family was in a position to provide information to the author. In another, the only photographs were from a few particular branches of a family.
- Look for the identity of the informant on pages other than the ones from which you need facts about the lineage and dates and places of birth, death, and marriage. A voluminous 19<sup>th</sup> century family history about one of my own families does not identify the source of information in the discussion of the family of one of my 4<sup>th</sup> great grandfathers. However, one of his sons is identified as the source of information over 200 pages before in the discussion of my 5<sup>th</sup> great grandfather's family. Some of that information was found in both sections. There is no doubt the 3<sup>rd</sup> great granduncle provided information about both his father and his grandfather.
- Is there specific information about where people lived? In the case of one local history, there was detailed information about the location of homes where certain people lived and how they acquired the property. That was a good indication the author visited the home and talked to the people.
- What documents are cited? In one recent case the author cited specific documents and named people who had custody of those documents.
- Is there a list of people who purchased advance copies of the book? Many of these people would have been in communication with the author during the research.
- Local histories, especially county histories published in the 1880s and 1890s, often published such biographical sketches of prominent citizens for a fee. The information was provided by the subjects of the sketches. Much was personally known to the subject and is considered as evidence by SAR if the person was in a position to know it personally.

Answers to these questions can lead to a conclusion about who provided certain information in a book.

The evidence leading to the conclusion must be presented. If the author explained the methodology for obtaining information, the salient page or pages must be submitted. If the author mentioned how long it took to write the book, submit that page. How the evidence leads to the conclusion needs to be explained.

After establishing that a person provided information, it must be shown that the person was in a position to have knowledge of that information. Was the person old enough? Was the person in a location to have had knowledge of the information? What was known to the subject must be separated from family tradition. Of course, try to verify as much information as possible independently. This will enable you to assess the overall reliability of the author/author's source(s) for the points of interest.

As with any case involving indirect evidence, there are borderline calls. A reviewing genealogist may examine the same evidence and reach a different conclusion. This is true of most proofs using indirect evidence. However, a link between generations in more than one application has been established because a source of information not named explicitly was successfully identified.

**New DAR Record Copies.** Record copies of DAR applications prepared under their new electronic application process have no verification marks: there are no check marks for accepted claims, no handwritten corrections, and no parentheses for unproven claims. Genealogy Committee Vice Chairman Jack Sweeney and I met with DAR Director of Library and Genealogy Darryn Licklitter and Assistant Genealogy Director Lynda Carter to learn how these applications are reviewed and processed. The new process requires the deletion of information DAR deems not proven and correction of erroneous claims prior to the approval of the application. What appears on the new record copy is what DAR accepts.

**Chapter and State Registrars.** All too frequently applications are submitted which simply do not offer a proof connecting two generations in the lineage. In the last month or so National even received several applications without proof of parentage for the applicant. In one case the birth certificate simply did not name the parents. In another case, the lineage to the patriot went through the mother and the birth certificate did not give her maiden name. In neither case was other evidence provided to prove parentage of the applicant. These problems should have been identified by the chapter and state registrars and corrected, but were none the less submitted to National. When problematic applications like these reach national, it takes extra staff time to notify the state registrar of the problem. This both costs SAR money for salary and slows the review of applications. It is very important that both chapter and state registrars conduct a meaningful review of applications. Most do this, but some do not.

Large states often have a problem performing good state-level review due to the volume of applications. Some, such as Virginia and Texas, have established assistant registrar or regional registrar positions that have proven quite effective.

By contrast, some states have very few applications pended even though there are borderline calls in genealogy. A lawyer once told me that if he won every single case, he was not going to court enough. The same is true of applications. If every single application is approved, personal standards of the registrar are probably higher than SAR's. However, please do not view this as an invitation to submit applications you know are too weak just to see if some will get through!

**The queue.** New member applications were being processed just under 7 weeks after they are received and supplementals about 25½ weeks after they are received. When the new member applications queue is down to under 6½ weeks, a staff member currently dedicated to new member applications will be shifted to supplemental applications.

**Email #31 to State Points of Contact**  
**11 August 2017**

**New York Revolutionary Tax Lists Now Posted.** The Empire State Society has posted all New York Revolutionary tax lists that have been determined by the Subcommittee on Revolutionary Taxes to provide evidence of patriotic service. The George Washington Endowment Fund provided financial support to obtain copies of the remaining known lists from the New York State Library. Previous lists had been obtained from the New York State Archives. The lists are easily found at [www.ess-sar.org](http://www.ess-sar.org) from the menu on the left side of the page. The lists include:

- Albany County 1779 (fifteen jurisdictions)
- Dutchess County 1779 (one jurisdiction only)
- Orange County 1779 (two jurisdictions) & 1780 (one jurisdiction only)
- Ulster County 1779 (three jurisdictions)
- Westchester County 1779 (9 jurisdictions)

Thank you, Empire State SAR and GWEF! Dutchess County lists in the Office of the County Clerk do not provide evidence of Revolutionary service.

**Subcommittee on Revolutionary Taxes.** The Subcommittee is seeking volunteers can obtain copies of tax lists the New Jersey State Archives and/or the North Carolina State Archives. Please respond to [sinksjohnd@gmail.com](mailto:sinksjohnd@gmail.com) if you wish to help.

**Using SAR, DAR, and C.A.R. Applications in Lieu of Evidence.** Many applications rely on a previously approved SAR, DAR, or C.A.R. application to prove lineage and places of birth, death, and marriage for one or more generations. If a fact is checked as accepted on the record copy, that fact should be claimed on the application being submitted unless additional documentation is provided to show the checked claim is in error. SAR staff genealogists report that they receive SAR applications upon which claims differ from verified information on a cited SAR, DAR, or C.A.R. application, but no evidence is provided to show the record copy is incorrect on the point in question. As a result, staff must take the time to correct the application being reviewed. This slows progress in reducing the queue and results in correction marks on the SAR record copy. Please remember that you must provide an official record or chapter copy of a DAR or C.A.R. application that you are citing as proof.

A related problem is claiming information that is not verified on an SAR, DAR, or C.A.R. application that is cited. C.A.R. actually has prepared a stamp saying bracketed claims from SAR, DAR, and C.A.R. applications should not be asserted (unless, of course, evidence separate from the record copy is produced). Like DAR (for traditional applications) and SAR, C.A.R. places parentheses around unproven claims on applications.

**SAR Record Copies for C.A.R.** C.A.R. is now accepting verified claims from record copies of well-documented SAR applications. The C.A.R. staff genealogist has told me that this is because of clear staff verification on SAR applications and a noticeable improvement in documentation and citations. If an SAR applicant is planning to use a record copy of his SAR application for a close relative to join C.A.R., he should be aware that C.A.R., like DAR, requires “complete” information for the three most recent generations for both spouses. This includes dates and places of birth, marriage, and death in addition to lineage. SAR does not require complete information so long as lineage, service of the patriot ancestor, and gender of the applicant is proven, although it encourages additional information. If an SAR application omits or fails to prove complete information about the most recent generations, a C.A.R. applicant using the record copy will be required to provide and prove that missing information to C.A.R. Providing and proving that information to SAR can benefit close relatives applying to C.A.R., and is good genealogy.

**Printing on SAR Applications.** Staff genealogists will return applications with badly smudged, faint, or flaking print. The most recent volunteer helper who printed an application with flaking toner was your Genealogist General. Staff tells me that this often appears to be a problem when the toner cartridge is running low. To test the replacement application, I ran my finger the length of each side of the page.

**Adoptions and children born out of wedlock.** During the last year or so I have received a number of requests for guidance from potential members who were adopted or who had a parent or grandparent who was adopted. The gentlemen understood that the lineage for SAR, as well as other major lineage organizations, must be through the “birth” ancestors. In all cases, the gentlemen had information about the identity of the birth ancestor, but did not have the usual evidence of the relationship. They needed a direction on proving their lineage. Often proof of their lineage is especially challenging because of sealed adoption records and birth certificates naming the adopted parents in a way that is indistinguishable from birth parents. I myself have a niece by adoption who has been unable even to identify her birth parents in part for these reasons. There are several approaches the problem of proving the parentage.

First, there is always a possibility that the parentage of the child was acknowledged by a parent or other relative in a will, deed of gift, correspondence, or even an obituary. This possibility should not be overlooked.

Second, the parentage may be known to living people. Even if the birth parents are deceased, one of their siblings may know the facts. In one case involving the parentage of a great grandfather, a niece was told about the paternity of her uncle by a half-sibling of that uncle. In another, children by the second wife had been told by their deceased father that he had a child by a previous marriage. Get affidavits if possible! If more than one person can attest to the facts, get more than one affidavit. These are cases in which corroborating evidence is useful and different people may know different details. An affidavit should provide details beyond the simple statement of the parentage of the prospective member. The affidavit, to the extent that information is known, should:

- identify the affiant;
- explain how the affiant came to know the facts, including when and where the affiant learned the facts, the source of the information, and the circumstances under which the affiant learned the facts;
- state the relationship of the person or persons who provided the affiant with the information about parent(s) and child;
- state the relationship of the affiant to the parties involved. (The relationship need not be by blood or marriage. For example, a neighbor know the facts.)

Attesting to the document before a notary public is sufficient.

Third, DNA testing can be very important. SAR now has two staff genealogists with expertise in DNA testing for genealogical purposes. The three DNA tests widely used in genealogy are:

- Y-DNA—tests the Y chromosome, a genetic contribution from the straight paternal line only. This test would not exclude a descendant of brother or male cousin of the “target” ancestor from matching.

- mt-DNA—tests mitochondrial DNA, which is a genetic contribution on the straight maternal line only. It includes the mother’s contribution to a son who takes the test. Mitochondrial DNA is relatively stable, so a match could be evidence of a common female ancestor who lived centuries ago.
- at-DNA—tests autosomal DNA, the genetic contribution of both male and female ancestors, but its value is usually limited to recent generations (no more than 5 or 6).

Keep in mind that Y-DNA only offers evidence of a connection to the same man in the paternal line as another tester, but does not prove who specifically on that line is the most recent common ancestor. Autosomal DNA results, on the other hand, can point to specific possible relationships but is only useful if the connection is relatively recent. Staff advises that in some circumstances, Y-DNA will be the most appropriate test to use while in others autosomal DNA is more helpful. Sometimes a combination of the two is appropriate.

Tests should be for 37 markers or more. 12-marker tests are really not sufficient for genealogical purposes. A common mistake that people make is to assume, rather than prove, the lineage of the person or persons who match the applicant. If there is a match with the brother of a man hypothesized to be the father of the prospective member, the prospective member should prove that the men were in fact brothers and that the man whom the prospective member matches indeed descends from that brother.

**New DAR record copies.** DAR has starting using new application system. The first record copy from this system was recently received by SAR to prove an SAR application. This record copy had no verification marks or initials of a reviewing genealogist. I have been informed that unproven claims are electronically deleted during the preparation and review process, so that only claims accepted by DAR appear on an approved application. SAR Genealogy Committee Vice Chairman Jack Sweeney and I plan to meet with DAR to learn more about the review and modification process for these applications.

At the beginning of Gen. 2. where SAR has “I am the son of”, DAR has “I am the biological daughter of” on the new applications.

**The queue.** SAR is working on new member applications received 7 ½ weeks ago and supplemental applications received on 24 ½ weeks ago. With many summer vacations over, we are again seeing progress in reducing the backlog.

**Email #30 to State Points of Contact**  
**22 July 2017**

**FamilySearch to discontinue microfilm and microfiche distribution.** FamilySearch is discontinuing its distribution of microfilm and microfiche! The last day to order microfilm to be delivered to a local Family History Center is 31 August 2017. FamilySearch is in the process to digitizing it films and fiche, provided there are not privacy or contractual restrictions. If you need to order microfilm or fiche, you should do so in the near future. For further information, see <https://familysearch.org/ask/faq#overview>

**Genealogy and membership decisions at Knoxville.** A number of decisions about genealogy and membership were made at Congress.

1. Changes to application forms approved by the Trustees at the Spring 2017 Leadership Meeting and to be implemented by 1 August 2017 are now to be on all applications received at NSSAR after 1 January 2018. Forms modified before this date can, of course, be used as soon as they are released.
2. The SAR Constitution was amended to replace the requirement for an ancestor's Revolutionary service from "who was at all times unfailing in loyalty to," with "who at the time of his last known service demonstrated loyalty to,". The new requirement is in fact the long-standing practice of SAR. For example, in the past we have accepted the service of Hessian soldiers who deserted and joined the Continental army. The new language will also appear in the certification above the applicant's signature on application forms and must be on all applications received at NSSAR after 1 January 2018. *Updated versions of the application form in PDF and Word are attached. These forms have all changes required by the Trustees as of their final meeting at Congress on July 6<sup>th</sup>.* (The PDF is courtesy of Mike Scroggins.) Changes to the Cox software are underway.
3. Birth certificates are no longer required for the applicant, provided that his lineage and gender are proven by other submitted documents. The requirement that applicants submit a birth certificate to join SAR had been established by the Trustees at the Spring Leadership Meeting and had already proven to be a hardship on some men applying for membership. At this Congress, I met one compatriot who was born in the continental United States in 1946, but had no birth certificate because the hospital burned down.
4. Three changes were made to Bylaw 22, Section 2 concerning Family Plan Applications. Primary documents are no longer required for Family Plan applications, just as they are not required for other applications. Many secondary documents are acceptable. A defect in the wording was remedied so that, for example, two brothers and their grandsons can all apply for membership under a single family plan. Under the old wording, a grandson of one of the brothers would not have been eligible for the Family Plan that included the other three. Finally, if two members have approved applications establishing their lineage back to a common ancestor, their supplemental applications for a patriot from whom that common ancestor descends qualify for the Family Plan, provided they are submitted under the same transmittal sheet.
5. Bylaw 22, Section 6 was modified so that dues accompanying applications registered on or after September 1<sup>st</sup> of a year are to be credited to the following year. Applications are not to be held or delayed at NSSAR in order to cause the membership dues to be credited to the following year. Under the old language, dues accompanying applications received (rather than registered) after 31 October were credited to the following year. This change means that a man who is registered as a member in September or October is no longer charged a full year of dues for only three or four months of membership. His first three or four months are free. This is much more friendly to new members than charging them for eight or nine months that they were not members.

**States and chapters can hold applications.** If an application is likely to be registered shortly before September 1<sup>st</sup>, a state or chapter can hold the application so the dues can apply to the following year in full compliance with the Bylaws. The state or chapter is not to ask NSSAR to do this, and NSSAR is not to offer to do this. As a chapter registrar and more recently a volunteer helper, in the past I informed men whose applications were close to the old deadline that they could save a year of dues if their applications are held for a short period of time. About half of the men asked that their applications be held and about half said not to hold them, that they money was not that important to them. All appreciated being offered the option.

**Family Plan applications for membership in different states.** Men in different states can take advantage of the Family Plan by submitting their applications through the same state under the same transmittal form. However, the state and chapter through which an application is not processed should be informed of the application and must receive their required state and chapter dues for new member applications and any other mandatory fees.

**The Genealogy Workshop at Congress.** Cynthia Weatherby spoke on “Case Studies—Tips and Techniques for Challenging Research Issues.” The session was very well attended, with over 80 people present. The presentation was about an hour and a half with a half hour scheduled for questions that lasted longer until we had to leave the room so it could be set up for the next event.

**IT System Modifications.** I was pleased to hear candid remarks about our IT challenges by President General Guzy in his inaugural speech at Congress, and again the next morning in a discussion in the Executive Committee Meeting. (I am not a member of the Committee, but attended most of the meeting.) Acknowledging problems is the first step to fixing them.

SAR has compiled a list of modifications to systems developed for it under contract to Blackstone. The list is attached with cost estimates. In the Executive Committee Meeting it was reported that under our contract with Blackstone SAR has 30 days to report bugs or deviations from specifications. SAR must pay for problems reported after that time, or to changes to implement features not covered in the specifications. I learned of the 30 day limit at that meeting. Another active member told me that he was unaware of an announcement that the application system had even been officially released. (He did know it was in use.) In retrospect, I too was unaware of an official release. This is a communications problem that must be addressed for future contract deliverables, and not just IT contracts.

A number of problems that had been previously reported were not on the list to be fixed, including the intermittent problem of citations disappearing after they are saved in the Blackstone Application System. If you or compatriots in your state are encountering problems not on the list, including previously reporting problems that you are still observing, please report them by email to:

[sarhelp@sar.org](mailto:sarhelp@sar.org)

Feel free to copy me as I try to keep track of the problems facing state and chapter registrars, but I respectfully note that I am not the clearing house for system problems.

**NEHGS to Digitize Mayflower “Silver Books.”** The New England Historic Genealogical Society will digitize Generation 5 from the 31 volumes of “Silver Books” of the General Society of Mayflower Descendants. Generation 5 often includes the ancestor of age for Revolutionary service and the children of that generation. These images, along with the Mayflower Quarterly, will be available exclusively at AmericanAncestors.org. The Silver Books cite the sources used.

## Email #29 to State Points of Contact 19 June 2017

**Impact of increase in applications and new staff genealogists.** New-member applications are currently being received at a pace even faster than last year, when we received a record of 4,112 new member applications in twelve months. January-May data show:

Applications Received	Jan-May 2017	Jan-May 2016	Jan-May 2015	Jan-May 2014	Jan-May 2013	Jan-May 2012	Jan-May 2011
New Member Applications	1,884	1,748	1,643	1,580	1,486	1,443	1,211
Supplemental Applications	515	732	654	725	609	553	366
Total Received	2,399	2,480	2,288	2,305	2,095	1,996	1,577

Over the last 7 years, received in the Jan-May period has grown on average over 115 per year. NSSAR hired an additional genealogist in mid-March to work 30-32 hours per week, and in April another to work 24 hours per week was added to the staff (although technically he can be assigned to other departments). Both are reviewing new-member applications.

The addition of staff has had a positive impact. The length of time a new member application waits for review is now just under 8 weeks as of the last Thursday, compared to about 12 weeks in mid-March. After the new member queue is reduced by another week or two, some staff hours will be shifted from new member to supplemental application review. Historically there is a seasonal drop in the queue of new member applications in the fall. That should enable SAR to continue to make progress on the new member queue as well. Supplemental applications are currently being reviewed 25 ½ weeks after they are received.

A lesson learned is that SAR needs to estimate changes in workload by monitoring trends in applications received rather than allow the queue of applications to build to unacceptable levels. If SAR undertakes new initiatives to encourage additional applications, this will be extremely important.

The national level is not the only place where adjustments are needed in this respect. Chapter and state registrars have increased workloads as well. Some states and even chapters have already taken steps to deal with this. Some have established assistant or regional registrars to divide the workload. Many chapters and even states have volunteer helpers who guide prospective members, assist in the preparation of applications, and do further research if needed.

**Training registrars and volunteer helpers.** The second major factor in the backlog is the quality of applications and documentation received. The veteran staff genealogists have been unanimous that there has been a decline in quality for over a year. It seems to have grown with an unusually large turnover in state registrars. This suggests that training is an issue. We should not merely expect our registrars to grow with experience.

SAR has made available at its website a Genealogy Committee Policy Manual, an Application Preparation Manual, and several papers are reports on specific topics such as Revolutionary taxes and qualifying evidence for service at the Battle of Pt. Pleasant. Alas, this is not riveting reading and it is clear that many have not taken advantage of these resources. We also have had genealogy seminars at the Leadership Meetings and the Congresses, but despite good attendance these reach only a fraction of our registrars. We need interesting training that will reach into the states and chapter levels.

One option would be to prepare a series of short videos on different aspects of SAR genealogy policies and application preparation. The most important topic to cover, based on why applications are pending, would be acceptable documentation. However, at this point SAR does not have the equipment or editing capability to prepare good quality training videos.

**Your thoughts?** Your thoughts on what we can do to make the application process more efficient and effective would be appreciated.

**Unacceptable documentation.** A major problem experienced by the staff genealogists is the submission of unacceptable documents in application packages, documents such as undocumented family trees and Genealogical Data Communications (GEDCOMS). These are clearly not admissible as evidence under Policy 3.5004. Although this policy lists unacceptable documents, there are borderline cases. This is especially true for family and local histories. Careful analysis can sometimes reveal that specific information in a family or local history book was provided by an acceptable source even though it appears undocumented. Staff needs to receive the borderline cases, but prefers that the blatantly unacceptable documents be removed at the chapter and state level. In such cases, feedback should be provided to the chapter registrar so they can improve the quality of applications submitted to the state level. If clearly unacceptable documents are essential to the proof of lineage or service, the applications should not be sent to Louisville until they are shored up. Pending of applications at National takes valuable staff time.

Some chapter and state registrars continue to remove documents that are necessary to prove claims on an application. It is *not* the case that staff wants to receive only documentation for ancestors in the bloodline to the patriot. Such information may provide a basis for future applications, including supplementals, and forestall future questions about the identity of individuals at that generation. Moreover, the applicant is paying to have his application examined and has a right to expect the evidence proving his claims to be on file in Louisville and his record copy to have check marks confirming verified claims. In some cases, even documents essential to the proof of lineage or service are apparently being removed. Staff reports that it is not unusual for necessary documents to be provided in less than a day or two after requested, leading to the belief that they were in hand all along. If an admissible document proves a claim on the application and does not merely duplicate other evidence, it should not be removed.

**Subcommittee on Revolutionary Taxes.** Tim McCabe is retiring from the Subcommittee on Revolutionary Taxes. Tim has ably served on the subcommittee since 2012 and has rendered very valuable assistance to the reports on Revolutionary tax statutes and lists that are posted at SAR.org. Thank you, Tim.

A replacement for Tim will be needed. It would be especially useful to have a member or members with access to tax lists at the North Carolina State Archives, the New Jersey State Archives, or New England states. The subcommittee needs digital images, either from scanning microfilm or photographs of paper lists, in order to evaluate which tax lists from these states were mandated by laws supporting the Revolution.

If you are interested in serving on the subcommittee, please notify Jim Faulkinbury [jfaulkin@surewest.net](mailto:jfaulkin@surewest.net) and me. Under parliamentary procedure, membership on a parent committee is not a requirement for membership on a subcommittee appointed under the auspices of that committee.

**Email address changing.** My email address will be changing from [jsinks@comcast.net](mailto:jsinks@comcast.net) to [sinksjohnd@gmail.com](mailto:sinksjohnd@gmail.com). I plan to change internet service providers in the foreseeable future.

**Email #28 to State Points of Contact from the Genealogist General  
4 May 2017**

**New staff genealogists.** Two new genealogists have been added to the Genealogy Department. Susan Julian started in late March and Jeff Bell in mid-April. Susan is working full-time on new member applications, and Jeff is working part-time 3 days per week on new member applications. Both have completed training and are working on their own.

Susan Julien holds a BA in English from Ohio University and MS in Library and Information Studies from Drexel University. She has been pursuing genealogy seriously for 7 years. She was tracking a genetic disease in the family and was challenged to find a grandfather who abandoned his family. That led to her interest in genealogy, especially genetic genealogy. She is a member the Ohio, National, Kentucky, and Louisville Genealogical Societies. She is in her third year of service as a DAR chapter registrar.

Jeff Bell is retired from the Anchorage, Kentucky Police Department. He holds the coveted certification as Advanced Criminal Investigator from the Kentucky Law Enforcement Council and treats every application as a cold case. He attended the University of Louisville and the University of Eastern Kentucky. He started genealogical research in 1990. He is a member of the Green County (Ky) Genealogical Society and the Green County Historical Society, and a member of SAR.

The addition of Susan and Jeff brings the staffing level to 5.8, 4.2 persons for new member applications and 1.6 persons for supplemental applications. This is the highest level since I have been genealogist general. Neither has a telephone line, so email contact is recommended.

**The queue.** The addition of new genealogists required experienced staff to spend time training the new employees, but we are now seeing a reduction in the time between a new member application being received and undergoing initial review. Today the gap is just under 10 weeks for new member applications and just over 22 weeks for supplementals.

**Actions to be proposed at Congress.** I have been informed of three proposals that will be brought forward at Congress in Knoxville that concern genealogy and membership. I urge you to review them carefully when formal announcement is made and to inform your delegates and trustee of your views. I support all three.

**1. Constitutional Amendment for Patriot Ancestor.** The California SAR will propose an amendment to Article III of the SAR Constitution to the delegates. The proposal would replace the requirement the patriot ancestor have been "...at all times unfailing in loyalty to...the cause of American Independence..." with "*...at the time of his last known service demonstrated loyalty to...the cause of American Independence....*" The present wording is contrary to actual SAR (and DAR) practice of accepting the last documented service as determining loyalty. The existing wording, for example, would disqualify a Hessian soldier who deserted the British and took up arms for the patriots, or a person who expressed support for reconciliation with Great Britain early in the Revolution but

later recognized that independence was necessary. Many registrars have been unaware of this provision and more than one has told me that he would now have trouble approving an application on a person who was a patriot for only part of the War.

**2. Trustee Policy Change.** The California SAR will also propose a change in the policy to the Trustees requiring a birth certificate or court order for proof of sex/gender adopted by the Trustees at the Spring Leadership Meeting. The new policy would be,

*An applicant must submit evidence that he is male, a qualification stated in the SAR Constitution. A document that establishes the lineage of the applicant which also establishes that he is male is acceptable, including but not limited to birth certificates, census records, wills of a parent, or a court order.*

All along SAR has accepted birth certificates and would have accepted a court order had one been submitted. The current Trustee's policy restricts evidence that can be considered and membership is more difficult. Subsequent to Email #27 we have had to inform several states a birth certificate is required, in several cases that a DAR record copy of a daughter of the applicant is not good enough, despite its evidence that the applicant was male enough to father a child. Another state was informed that an obituary of the parent its governor naming him as a son was unacceptable for proof of sex/gender.

Recent court decisions raise the question how much we have accomplished with the restriction adopted by the Trustees. I have received links to news reports that a justice in Oregon ruled that a person born as a male was gender neutral, and that a justice in Texas ruled that a 9 year old transgender person born as a female was male and ordered that a birth certificate stating the person was a male has been issued. In neither report was there any indication of hormone treatment or surgery.

**Proposed Bylaws Amendment.** The Indiana SAR is proposing an amendment to Bylaw 22 to the delegates. There would be three changes:

1. *the date of approval rather than the application is received will govern whether the dues are applied to the current or following year;*
2. *the date will be changed from October 31 to September 1; and*
3. *the National SAR will not hold applications in order for the dues to apply to the following year.*

**Accessing Virginia Probate Records at Ancestry.** Staff Genealogist Jessie Hagan reports a way to access Virginia probate at Ancestry.Com which cannot be found through the normal search procedure. Go to:

[http://interactive.ancestry.com/9085/007643996\\_00324?pid=1746826&backurl=https://www.ancestry.com/family-tree/person/tree/35920817/person/18853832292/gallery&usePUB=true&\\_phsrc=sqx8432&usePUBJs=true#?imgeld=007645295\\_00158](http://interactive.ancestry.com/9085/007643996_00324?pid=1746826&backurl=https://www.ancestry.com/family-tree/person/tree/35920817/person/18853832292/gallery&usePUB=true&_phsrc=sqx8432&usePUBJs=true#?imgeld=007645295_00158)

This will take you to Bedford County Bond Bk. 1. Immediately below "Virginia, Wills and Probate Records, 1652-1983," click on Bedford. This produces a drop down menu of counties and cities. Select one of interest to see what records are on-line. I have found that most of the will books have individual indices at the beginning. You must use the indexes in the books rather than Ancestry's on-line search. Staff is reluctant to ask Ancestry to provide better access to the records for fear the current access might violate their standards or policies. We do not want to kill the goose that lays the golden eggs.

**New York Tax Lists.** Revolutionary tax lists ordered from the New York State Library have arrived and been examined by the Subcommittee on Revolutionary Taxes. The following lists provide evidence of Patriotic Service in addition to those already approved. These new lists are:

Albany County

City of Albany, October 1779 Land and Personal Property Tax.  
 Cambridge Precinct, October 1779 Land and Personal Property Tax.  
 East Regt., Claverack District, October 1779 Land and Personal Property Tax.  
 West Regt., Claverack District, October 1779 Land and Personal Property Tax.  
 Cocksackie District, October 1779 Land and Personal Property Tax.  
 German Camp District, October 1779 Land and Personal Property Tax.  
 Great Imbought District, October 1779 Land and Personal Property Tax.  
 Halfmoon District, October 1779 Land and Personal Property Tax.  
 Hoosick District, October 1779 3<sup>d</sup> State Tax.  
 Kinderhook District, October 1779 Land and Personal Property Tax.  
 King's District, October 1779 Land and Personal Property Tax List 1.  
 King's District, 1779 October Land and Personal Property Tax List 2.  
 Northwest Quarter, Manor of Rennselaer District, October 1779 Land and Personal Property Tax.  
 Southwest Quarter, Manor of Rennselaer District, October 1779 Land and Personal Property Tax.  
 Saratoga District, October 1779 Land and Personal Property Tax.  
 Schaghticoke District, October 1779 Land and Personal Property Tax.  
 Schenectady District, October 1779 Land and Personal Property Tax.

Orange County

Goshen Precinct, March 1778 Special Assessment on Trade Merchandise.  
 Goshen Precinct, October 1779 Land and Personal Property Tax.

The Empire State Society will post these lists at its website, making them readily available to prospective members and current members working on supplemental applications and the will be added to SAR Library computers. A grant of \$260 from The George Washington Endowment Fund paid for the acquisition of these lists. The Empire State Society previously obtained a copy of a March 1779 Orangetown list which also qualifies. The Subcommittee on Revolutionary Taxes is in the process of updating its report on New York tax lists.

**Unproven Claims on Applications.** Claims for lineage, service, and the dates and places of birth, death and marriage require proof under SAR Genealogy Committee Policy 3.5001. If you do not offer a proof, leave it off the application. The staff genealogists have reported that most states are ignoring this requirement. The problem is not with a claim for which the evidence is insufficient, but the claim from which no evidence at all is provided. To illustrate this, one genealogist made a copy of an application and whited out all claims for which no proof had been offered. Virtually no dates and places remained. When no evidence is provided to back a claim, the genealogist looks back through the documentation to make sure the proof was not overlooked before bracketing the claim. This takes time and slows the review process, a matter of concern to us all. It should be noted that SAR is not the only major lineage organization to require proof of all that is claimed.

**Email #27 to State Points of Contact  
19 March 2017**

Email #26 triggered a number of questions and concerns about decisions of the Trustees. In addition, three entry fields were omitted from the Word application I sent you, although you could have entered the information after clicking on the Protect Form icon (a padlock) on the Forms Toolbar. Another email to you is in order even though Email 26 was sent just a week ago.

**Unfailing loyalty of the patriot ancestor at all times to the cause of American independence.**

Although this is specified in the SAR Constitution, it does not appear to be well-known. A number of you have pointed out that requiring this to be certified or enforced is contrary to long-established practice and is going to cause problems. Some who sided with the patriot cause did not support American independence early in the conflict. British and Hessian deserters who joined the patriot cause are prime examples. Many French and Spanish soldiers had no opinion about American independence prior to their nation supporting American independence. They would have not had unfailing loyalty at times early in the war. A majority of the Continental Congress sought reconciliation rather than independence until the summer of 1776. Loyalty of some waivered, but was later restored before the Revolution ended. One state registrar told me that he had been unaware of the requirement in our Constitution and in the future will have a problem signing applications using such patriots. Another point of contact made the point that unfailing loyalty was in the mind and may not have caused an overt action. Some believe we must amend the Constitution to reflect the long-standing practice of recognizing the last overt act of service as the deciding event and are at work on a proposed amendment.

**Requiring birth certificates for applicants.** Questions are being asked why evidence we now accept for proof of the applicants parentage should not be accepted if the gender was specified, provided that the applicant had not undergone medical procedures to change sex from male to female. In addition to birth certificates, we use records such as the 1940 census, wills of a parent in which the applicant is identified as a son, and obituaries of a parent in which the applicant is identified as a son. If these records are good enough to prove lineage to SAR, why should they not be good enough to prove that an applicant is male?

**Application Systems/Forms.** There were a number of questions about the application form, and many were not aware of the various means of producing applications. So far as I know, there are four application forms/systems in use in SAR today.

1. The Application System developed by Blackstone and at the SAR website.
2. The Cox System.
3. The Microsoft Word Form.
4. The PDF Form.

There are differences among the printed applications produced by the four systems/forms, but to the best of my knowledge all were accepted by the Trustees without repeal of the minor variations produced by other means. During discussions between members of the Legal Advisory and Genealogy Committees, very strong opinions were voiced that all of these systems/forms should be updated with the new changes Congress is now requiring. The tenor of the discussion was that a good faith effort would be made to update all four. If this had not been the case, I believe a strong campaign would have been mounted against the proposed changes to the applications and approval by the Trustees would have been doubtful. ***Plans are being pursued to modify all four no later than 1 August 2017 to meet the requirements passed by the Trustees, and any updated form can be used as soon as it is available.*** I have modified the Word Form, and Jim

Faulkinbury has started modifying the PDF Form. The other two will require a contractor to modify the system.

A number of questions and comments were directed specifically to the Word form.

- I have added entry fields for the National and State numbers for supplementals. I also restored the entry field for the name of the applicant in the certification, which I had inadvertently deleted when removing a name after testing.
- I have adjusted some spacing on the second page now that we are no longer binding applications and added some punctuation, especially colons, that have been approved when the Blackstone changes were submitted.
- The file name is not significant. I merely used an old name with the date of changes to track versions of my work. I have renamed the new file.

The new version of the updated Word Form is attached.

In the long run, we will want a single application system that will transfer data verified by our staff genealogists to a data base supporting a Genealogical Research System. At the present time none of the four has this capability or is likely to have it in the near future.

**Please do not include unproven claims on applications.** Last week one of the staff genealogists told me that her work, and the work of her colleagues in the Genealogy Department, is being slowed by widespread failure to adhere to a very short and simple policy:

**3.5001 Only information for which a proof is given is to be stated on the application.**

When the genealogists find a claim unproven, they go back and hunt to see if they missed the evidence and before bracketing the claim. This slows the review process. The policy is a fairly new one and was designed to promote efficient review. In the old days, unproven claims were included on an application as a matter of course, providing clues to future researchers. I myself did this until I became Genealogist General and discovered how much trouble the practice was causing staff.

**Library of Virginia Budget Developments.** Email 24 reported that due to serious budget cuts the Library of Virginia reading rooms were no longer open for research on Mondays and Saturdays. Some of you, along with members of other lineage societies, expressed your concern about this to state officials. Thank you. The House and Senate conferees agreed on increases in the Library of Virginia budget for the fiscal year beginning 1 July 2017 that will enable the Library reading rooms to re-open for 6 days per week.

## **Email # 26 to State Points of Contact**

14 March 2017

**Decisions Made by the Trustees.** The Trustees made several decisions that concerning applications.

No later than August 1 application forms must have three changes. First, the section listing of the form children of the applicant will be discontinued. This was recommended by the Genealogy Committee for several reasons. When applications are eventually available through a genealogical research system, information about the children of the applicant will in essence have to be redacted manually for an additional generation. In addition, staff does not verify the names, dates and places of birth of children of the applicant as a matter of course. Second, language has been added above the applicant's signature space certifying that he meets basic requirements for membership as specified the SAR Constitution. The language is:

I, \_\_\_\_\_, certify that I meet the eligibility requirements of Article III of the Constitution of the National Society of the Sons of the American Revolution, namely that an applicant must be a male, a citizen of good repute in the community, does not advocate the overthrow of the Government of the United States by use of force or violence, and is the lineal descendant of an ancestor who was at all times unflinching in loyalty to, and rendered active service in the cause of American Independence. I further assert that I have examined this completed application and the documentation submitted to prove the facts and statements herein, and to the best of my knowledge and belief, the facts and statements herein are true and correct. I request that the Society act upon my representations and grant me membership.

This change was recommended by the Legal Advisory Committee with the concurrence of the Genealogy Committee. The final change is to have a space for the signature of the Genealogist General and the initials of the staff genealogist who reviewed the applications.

Concerns were raised in the Genealogy Committee that these changes should not require applicants and registrars to discontinue use of the Cox, pdf, and Word application forms/systems. Discussions with the Cox system developer indicates that it will be updated. A volunteer is sought to update the pdf form. I have modified the Word form, incorporating a few additional changes that had already been approved and implemented in the new on-line application system. This is attached to this email.

The Trustees also voted to require all applicants prove their gender by providing a birth certificate or court order in support of the application. Applicants cannot use such documentation as a 1940 census or a will of a parent identifying the applicant as a son, although these continue to be evidence of lineage should that not be stated on the birth certificate or court order. This requirement makes it more difficult to prepare applications for SAR speakers and medal recipients, which have frequently been done as surprises in the past. No officer or committee within SAR has the authority to waive this requirement. I have inquired about whether a grace period is to be allowed before this becomes effective, but have not received an answer. I will keep you posted.

**Genealogy Committee Decisions.** The Genealogy Committee made several changes in Genealogy Policy. These will be posted at the SAR website shortly at

<https://members.sar.org/media/uploads/pages/77/x8AvVPEFYELz.pdf> .

The new material will in red so it can be found easily. Here is an overview.

**Policy 3.5002.** Several sentences have been re-ordered. When bullets were added to separate discrete sections, an important qualification concerning DAR or C.A.R. applications approved after 1 January 1985 was left in another section: claims in those applications found to be in error by the DAR, C.A.R., or the SAR Genealogist General do not have to be accepted by SAR.

**Policy 5.5000 Residence of the Patriot Ancestor.** SAR Bylaw 1, Section 1 requires the application to set forth the name, residence, and services of the ancestor from whom the applicant claims eligibility. The residence of the ancestor during the Revolution has long been important to ensure that the ancestor of the applicant and the patriot are in fact the same person, but SAR has not had policy providing standards for acceptable proof of residence. A new section has been added to SAR policies providing such standards. Care was taken to allow indirect evidence, including evidence of the ancestor's residence before and after the Revolution, to be considered.

**Policy 6.1002a Signature of Applicant.** A couple of issues arose concerning the signature of applicants, including juniors too young to understand the significance of their signatures signing their applications. Proposed bylaws amendments were referred by the SAR Congress to the Genealogy Committee for review. The Genealogy Committee found that amending the Bylaws was unnecessary, but some policy changes were made to address the issues. For example, if an applicant is too young, he can sign his application, but a parent or guardian must co-sign.

**Policy 6.3002a.** Pended applications will now expire automatically after three years unless an extension has been granted or the decision is under appeal. Staff no longer needs to contact the state point of contact for each application and then determine whether an extension is warranted as part of the process. I have told staff that it is appropriate to send the URL for the report on pended applications to state points of contact before Congress and the Leadership meetings reminding them to review the status of applications that will be expiring. Applications and documentation of expired and withdrawn applications can continue to be picked up at those meetings, mailed back if postage is paid, or shredded. If there is no response by the meeting, expired applications and supporting documentation will be shredded. The handling of expired applications and supporting documentation will be normal practice and is not mandated by policy.

These are just overviews. For details, please read the policies when they are posted.

The Committee went on record that the new Application System must be modified to support searches on first, middle, and surname, on years of birth and death, and state or foreign county. Handling names, dates, and places as long strings will not support efficient searching. This was also discussed favorably in the IT Committee.

The Subcommittee on Recognition for Establishing New Patriots reported that the idea has merit, but SAR does not have an efficient way to determine whether an application is the first to be accepted on a particular patriot.

**Decisions of the President General.** The Ad Hoc Committee on Digitization of Applications and Documentation is now a regular committee. Work on this project needs to continue in the context of understanding the requirements for a genealogical research system. Jim Faulkinbury continues to chair the Committee. The Patriot Index & Graves and Patriot Biographies

Committees have been combined into a single committee. The chairmen of the former committees, Doug Collins and Tony Vets, will serve as co-chairmen.

**Decision of the George Washington Endowment Fund.** A grant has been made for the acquisition of some New York Revolutionary tax lists that are among the Garret Lansing Papers of the New York State Library. From an examination of one precinct, these lists appear to date from 1779, but were mandated by a different statute from the 1779 lists in the New York State Archives.

**Empire State SAR Posts New York Revolutionary Tax Lists.** 1779 New York Tax Lists from the New York State Archives are now posted at the Empire State SAR website. Click on NY Revolutionary War Tax Lists in the menu of the left side of their homepage, or go directly to:

[http://www.ess-sar.org/pages/nys\\_taxlists.html](http://www.ess-sar.org/pages/nys_taxlists.html)

All of these lists provide evidence of patriotic service for the taxpayers. Thank you, Empire State SAR! The Dutchess County Office of the Clerk has some tax lists from the Revolution, but they were in support of civil functions and do to provide evidence of Patriotic Service.

**Research Volunteers Needed.** For a number of applications, additional research is necessary. The staff genealogists are able to do some of this, and the applicant is often able to provide some records quickly. However, in other cases neither staff nor applicant has ready access to the records needed. For example, neither a California applicant nor a staff genealogist may have ready access to records of a particular Virginia County. We would like to identify research volunteers who can check particular records at the request of staff. The volunteers would identify a particular area or research facility to which they have access, such as Lancaster County PA, Virginia Eastern Shore, North Carolina State Archives, or the Dallas Public Library. Please do not include areas so large you could not travel to particular locations within them, such as "United States of America." If you wish to volunteer, please send me your name and email address. I will assemble a contact list for the staff. Staff will explain precisely what they need when requesting help.

**Genealogist General Authority.** From recent emails and comments it appears that what the Genealogist General controls is not well-understood and are unaware of the limits of his authority. Under the Bylaws the Genealogist General is the general officer responsible for examining applications for membership and approving those found to be in accordance with the policies and procedures established by the Genealogy Committee and the provisions of the SAR Constitution and Bylaws. The Genealogist General ensures that the rules are carried out; he does not make the rules. He is also the custodian of approved applications (which are kept at headquarters in Louisville) and reports the status of applications at the Spring and Fall meetings and at Congress. In practice, authority to examine applications is delegated to staff genealogists, although the Genealogist General is often asked about borderline calls. Staff and state registrars ask the Genealogist General for interpretations of policy and advice on research strategies to solve a problem.

The Genealogist General does not control the staffing of the Genealogy Department or assignments to the staff. That is the responsibility of the Executive Director. On two different occasions when I was interviewed by the Nominating Committee, a former President General queried me on that matter to make sure I understood it. President General Tomme met with the general officers at the Fall Leadership Meeting and told us that the Executive Director not only makes such decisions, he has no obligation to report matters like staff assignments to us. Such matters are reported to the President General, who is responsible for assessing the performance of the Executive Director. When a supplemental genealogist was assigned to work a day or two a

week on new member applications some months ago, the Genealogist General was neither consulted nor informed by the Executive Director or the President General.

As many of you know, I argued for a budget increase so the Genealogy Department could be expanded by a full-time person, and the Trustees approved that increase. I have previously reported to you that a major reason why applications are being reviewed so long after they are received at National is due to staffing level. When I became Genealogist General, the genealogy staff level was 5.2 positions. It dropped to 4.2. It is presently 4.8 positions and would go to 5.8 if/when the budgeted position is added. Although we are half-way through the third month of the year, I have received no information from the Executive Director or the President General about the plans or schedule for hiring an additional full-time Genealogist. The addition of a knowledgeable full-time genealogist would have a significant impact on the backlog of unreviewed applications and position the genealogy staff to commence prep work for digitization of records. This is not under the control of the Genealogist General.

**The queue.** New member applications are undergoing initial review about 12 weeks after they are received and supplemental application about 23 ½ weeks.

## **Email # 25 to State Points of Contact**

27 January 2017

**Change in Email address.** I am changing my email address to [sinksjohnd@gmail.com](mailto:sinksjohnd@gmail.com). I expect to be changing internet service providers from Comcast in the near future. *Please delete my old, Comcast address from your address book and add the new one.*

**Genealogy Seminar.** Debra Renard, our newest staff genealogist, will conduct a genealogy seminar on Friday, March 3 1:00-3:00 PM at our Leadership Meeting. The topic will be “Tackling Tough Cases with DNA.” Use of DNA testing in genealogy is a specialty of Debra’s. The seminar will be in Citation Rm. B in the Brown Hotel. Please check the schedule after you arrive in Louisville make sure there are no changes.

**South Carolina Service.** South Carolina has proven for me to be a difficult state to prove Revolutionary Service of ancestors. One of the main sources for service are 12 volumes published by Alexander S. Salley, Jr.: *Stub Entries to Indents Issued in Payment of Claims Against South Carolina Growing Out of the Revolution*. These are in many libraries, and are available on-line.

<https://familysearch.org/search/catalog/197626?availability=Family%20History%20Library>

The stubs were retained by the state to show the name, service, and amount of the claim. The stub indents to not identify the location of the service. If more than one adult of the name was in the South Carolina, determining which one performed a particular service may be very difficult, although not impossible.

Documents supporting the claims are found in *Accounts Audited of Claims Growing Out of the Revolution in South Carolina* and are on 165 reels of microfilm. The microfilm does not appear to be widely available. The records are organized alphabetically by the name of the patriot. However, within a given folder, there may be records of more than one patriot of the name. These documents may provide information enabling one to locate where a particular man served. For one of my ancestors, John Weir, I learned that the claim was endorsed by a colonel who lived in Chester County when it formed after the Revolution and that the claims included the loss of a horse at the Battle of Fishdam Ford. Following up on this information, the Draper Manuscripts revealed that the colonel recruited on the creek where my ancestor had purchased land prior the Revolution and still owned it when he signed his will.

Records of jury service almost always provides information about where the service was performed. Two published books on jury service are useful for documenting South Carolina Revolutionary service:

[Mary Bondurant Warren](#): *South Carolina Jury Lists, 1718 through 1783*.

[Ge Lee Corley Hendrix](#) & [Morn McKoy Lindsay](#): *The jury lists of South Carolina, 1778-1779*.

If a check at [worldcat.org](http://worldcat.org) reveals that a library near you does not have a copy, you may be able to borrow a copy on interlibrary loan or purchase a copy.

**Tombstone Photographs.** Photographs of tombstones that were placed not long after the death of the decedent are valuable documentation. It is important to provide the name and location of the cemetery with the photograph, however. In many cases a precise address for the cemetery can be provided. Geographic co-ordinates of the tombstone are welcomed. Registration of the graves of the patriot ancestors is strongly encouraged.

**DAR Corrections.** In recent weeks three or four different members have asked about corrections or updates to DAR services or lineages. DAR, like SAR, will accept corrections from any person. There is no special arrangement between the SAR and DAR staff for corrections. Corrections must be documented and any appropriate genealogical proof arguments attached. They should be mailed to:

Corrections Team, Genealogy Department  
Daughters of the American Revolution  
1776 D St., NW  
Washington, DC  
20006

After examination, the DAR will make appropriate updates to the ancestor portion of its Genealogical Research System after a correction or update is approved. The evidence is saved in a corrections file, but will not be added to the DAR patriot documentation files that the public can order until a new DAR application is approved. I personally made a correction that have re-opened a closed DAR line, a correction that closed a line, and a correction that the date of birth of a patriot by two decades, opening the door for additional children of the patriot. These changes were made in the listing for the patriot in the DAR GRS promptly without waiting for another lady to join on the patriot.

**Applications Received in 2016 and Application Processing Time.** For the first time during my tenure as Genealogist General, and I suspect the first time ever, SAR received over 4,000 new member applications in a year: 3,565 regular, 437 junior, and 20 memorial new member applications. Supplemental applications, by contrast, dropped to just over 1,350 applications received, compared to over 1,500 received in 2015. A drop in supplemental applications is not surprising, as some rushed to submit supplementals before the 2015 price increase. However, this does not explain the substantial drop in the fourth quarter of 2016 to 210 for the three month period, well below the 382 per quarter received in the first three quarters. If any of you know reasons for a substantial drop in the last three months for supplementals from your state, please let me know.

New member applications are being processed about 12 ½ weeks after they have been received, and supplemental applications about 22 weeks after they are received. This number is roughly unchanged since Email #24 in late December.

## **Email #24 to State Points of Contact**

26 December 2016

**Virginia Revolutionary Tax Lists.** The Virginia SAR has posted copies of the specific taxes at: [www.virginia-sar.org/vassar/index.php?content=doclib&dirparm=Virginia%20Revolutionary%20Tax%20Lists/](http://www.virginia-sar.org/vassar/index.php?content=doclib&dirparm=Virginia%20Revolutionary%20Tax%20Lists/) The lists can also be found from their home page under the DocView tab. At the time of the Revolution a specific tax was one to be paid in specified commodities. These taxes were supply taxes. Most of the records predate the 1782, when the statewide personal property and land taxes took effect. Records are not all extant for all counties, and when there are records they do not cover the entire county. However, they can be especially valuable for finding service of patriots who died during the Revolution, moved to an area where we do not have records, were exempted for age, disability, or active military duty, or for some other reason are not listed on later rolls. One compatriot has already found an ancestor using the Virginia website and is preparing a supplemental application. Thank you, Virginia SAR, for making these records available.

**Reduction of Hours at Library of Virginia.** The Commonwealth of Virginia has implemented major budget cuts. These had a very hard impact on The Library of Virginia, which includes the state archives. The Library is now open only four days a week, Tuesday through Friday, 9:00 AM to 5:00 PM. Monday and Saturday coverage has been eliminated. In addition to the loss of two days per week, the Archives lost four staff positions. Two of those staff members chose retirement, each with over 30 years experience. Although the Archives staff is still very capable, we have lost a great deal of institutional knowledge with the departure of these two men.

Check library and archives hours before setting out for research. With budget cuts, many institutions are forced to reduce coverage from what you are familiar with from the past.

**German names.** Sometimes a family in the late 18th century would name a child with the same name as a child who had already died, especially if the name was handed down in the family. German families often gave the same first name to every child of the gender. The sons might be named Johann Nikolas, Johann Georg, and Johann Freidrich. The daughters might be named Maria Magdalena, Maria Elisabetha, and Maria Margaretha. The middle name was the name that would be used in daily life and would appear in wills, tax lists, muster rolls, etc. This was the rufname. The first and middle names are often found in baptism records and on tombstones.

**Virginia Public Service Claims.** The Virginia Public Service Claims are used extensively to prove Revolutionary service. Claims were made for providing supplies as well as other services, such as driving cattle for the army. They are especially useful for service of men above prime military age and widows. Many use the published books of Abercrombie and Slatten as the source. These books cover only the court booklets and lists which were compiled at the end of the Revolution for claims made under a statute passed in May 1780. Researchers should use the Library of Virginia website on-line catalogue to see an index that includes additional records of public service claims: certificates and commissioners books. These can be found under the drop-down menu for Images and Indexes at the LVA home page:

<http://www.lva.virginia.gov/>

I have found certificates for which there was no entry in the court booklets, and many court booklet entries are not backed by an extant certificate.

Certificates were issued when property was provided. These were authenticated by the county courts and records can be found in court minute and order books. The lists and court booklets were compiled for submission to the state government in Richmond. The Commissioners Books record the authorization of the state to pay the claim. These books generally have the least

amount of information, and the table of contents needs to be copied in addition to the page bearing the name of the ancestor in order to show the county from which the claim was made.

Records of supplies and other non-military services prior to 1780 are difficult to find. A few records have been found intermixed with the Virginia Specific Taxes, which the Virginia SAR has made available on its website (see above item). The first three volumes of *The Journals of the Council of the State of Virginia* also provide records of reimbursements. The first volume actually begins with the journals of the Committee of Safety of Virginia. These books are indexed, although not very well. The original records are at the Library of Virginia, unindexed.

**New York Revolutionary Tax Lists.** Some additional Revolutionary tax lists have been located in the New York State Library among the Garrett Lansing Papers. One of these lists, an October 1779 list for Orange Town in Albany County, was obtained for us by Empire State SAR President Duane Booth. This led to the discovery that other lists dated October 1779, rather than in the spring of 1779. New York passed had two different taxes in 1779 that supported the Revolution. The Subcommittee on Revolutionary Taxes plans to obtain copies of these additional lists and verify that there were in fact assessments supporting the Revolution.

**Problems Remain with the New Application System.** Over the last several weeks I have been working with a new member on over a dozen supplemental applications. He is very enthusiastic! He likes the ease with which he can also create supplements for his grandson by adding an extra generation. We have had to work around the problem of sharing the applications by sharing his password, something that make me wince as a retired IT professional. More than one state point of contact has complained that applicants and chapter volunteers who help them cannot share applications being prepared in the new system the way they do with the old methods.

Many other problems with the Application System reported well before the Fall Leadership Meeting still have not been fixed. Let me give you a few related examples. Sometimes the font size increases so dates are split onto a second line. This may require an extra page. There has been improvement, but I found the problem persists when the Before, About, or After box is checked for a date. In these cases the Preview Screen failed to show the dates splitting onto two lines even though the did when printed. To avoid a third page, I tried to save a few lines by making citations terse. The space to enter citations is still only about 1/3 of the width in which the text will be printed, with empty space on the right. This has the practical consequence of making it impossible to see how many lines citations take from the entry page. One person correctly said I could jump to the preview page, but why should I have to leave the entry screen and then come back? That is inefficient when preparing an application and simply poor design.

Staff has told me that usage of the new system remains low. We will not speed transition to the new system by leaving reported problems unfixed. Some have advocated forcing applicants to use the new system, but what incentive will there be to fix the problems if applicants and registrars are forced to use the system without reported problems being fixed?

The new system has very attractive features, including the dynamic allocation of space for citations and the citations appearing immediately after the names, dates and places for the generation. It is really nice to review and application without having to turn it over to see the citations for each of the first eight generations. If the problems that have been reported, both design problems and bugs, are fixed, we should be able to get greater usage.

**Application Processing.** Last week member applications were undergoing review about 12 1/2 weeks after they were received and Supplemental Applications after about 22 weeks.

## **Email #23 to State Points of Contact**

17 October 2016

**Trustee Decisions at the Fall Leadership Meeting.** The trustees approved a budget that included money for adding a full-time genealogist to the staff and work on the index module for a genealogical research system. A motion was made to require use of the new application system effective 1 January 2017. A reason offered for the motion was the need to move data bases, including the Patriot Search data base, from an old server that must be retired due to reliability. However, moving the data bases can be accomplished independent of using the new system. The motion was soundly defeated by a voice vote.

**Genealogy Committee Resolutions.** The Genealogy Committee unanimously passed two resolutions concerning the future modules that will provide a basis for an SAR genealogical research system.

One resolution concerns how the data base will be populated from applications. There were three basic points (my summary to save space).

1. Only information marked as verified on current and future applications will be used in the core data base.
2. Information from old applications will be used in the core data base. This information was verified in accord with the standards of the time, but may not meet current standards. (Old applications do have value. At minimum, if the applicant was in a position to have personal knowledge of the information, it can be considered as evidence. Other claims may provide a road-map for future research.)
3. Information displayed for an ancestor search will be corrected as new applications reveal problems with old information. Warning flags will be used.

The second resolution is:

Resolved, that the SAR should design its genealogical research system so that information from approved applications and documentation is searched and displayed separately from information from Revolutionary graves and Patriot Biographies. There should be links on the displays of information from one source to information from other sources where the information is about the same patriot.

The current Patriot Search intermingles information from applications with information from Patriot Grave. This decision was made over strong staff objections and without input from the Genealogy Committee. Applications have a lineage associated with them and have been reviewed in accord with standards in place at the time. Grave registrations undergo no national level review and seldom if ever include a lineage.

**Other Genealogy Committee Decisions.** The Genealogy Committee approved a number of changes in Genealogy Policy intended to clarify wording or correct typographical errors. These are posted at the website as of this morning. Subcommittees were established to consider the following issues:

- Proposed changes to the Bylaws concerning signatures on Junior Member Applications and Memorial applications. The Bylaws Committee recommended at Congress that these be referred to the Genealogy Committee.
- Acceptable evidence for proof of residence of the patriot during the Revolution. Residence is required by Bylaw 1, but proof standards have not been addressed.
- Possible recognition of members who establish a new patriot ancestor through a new or supplemental application.

**Ad hoc Committee on Digitization.** President General Tomme appointed an *ad hoc* committee on the digitization of applications and supporting documentation.

**Expedited Applications.** Request and approval for expedited processing of an applicant is not well understood. The following persons can request that an application be expedited:

- An applicant, sponsor, state registrar, state secretary, or state president.

The following persons comprise a panel with the decision-making authority:

- Executive Director, Genealogist General, and/or Chairman of the Genealogy Committee. (Don Shaw, John Sinks, and Jim Faulkinbury are the incumbents.)

Please submit requests by email to all three members of the panel.

The number of votes needed for approval depends on the applicant's circumstances:

- one vote for applicants who are nearing the end of their lives (in hospice care, extreme advanced age, etc.) or are on active duty military in a war zone or facing imminent deployment to a war zone;
- two votes for applicants of very high social or government status;
- three votes for applicants in all other cases.

I believe that all requests requiring only one vote have been approved during my tenure. There has been concern about the threshold for extreme advanced age, however. I believe that during my tenure the very few requests requiring two votes have been approved. Please bear in mind that celebrity is not the same thing as high social status. Where three votes have been required, some have been approved and some have been denied. These require a solid justification.

**Application Processing Status.** New member applications are currently being examined about 11 1/2 weeks and supplemental applications about 20 1/2 weeks after they are received, compared to about 4 1/2 weeks and about 14 weeks a year ago and about 11 weeks and 16 weeks on 21 August. Staff have informed me that President General Tomme and Executive Director Shaw decided to assign a supplementals genealogist to work a day or two per week reviewing new member applications.

**Genealogy Department Staffing.** In 2013 when I became Genealogist General in 2014 the staffing level in the Genealogy Department was 5.2 genealogists—4 full-time and 2 part time employees working 3 days per week. In the fall of 2014 the staffing level was reduced by 1 full-time employee to 4.2 genealogists. For much of the last year and a quarter a 3 day per week “floater” employee has been working in Genealogy. That person has being reassigned to other areas where her skills can be better utilized. I support this decision. Hiring a 3 day per week part-time employee was authorized in June. The person hired decided she wanted to work only two days per week, and then decided she wanted to work only 5 hours per day. She resigned a day or two after I sent Email #22, before she completed her training. I urged the President General to authorize budget resources to hire a full-time genealogist, but an offer was made for a 3 day per week part-time and accepted. The new employee, Debra Renard, started earlier this month, bringing the current staffing level to 4.8 positions. An additional full-time genealogy position is in the approved 2017 budget. There will be new work in the Department preparing for digitization. The total staffing in the Genealogy Department will be about 5.8 positions in 2017, but roughly 5.2 positions are expected to be devoted to reviewing applications.

## **Email #22 to State Points of Contact**

21 August 2016

**Genealogy Seminar at Fall Leadership Meetings.** Denise Hall will speak on how to evaluate applications at the Fall Leadership Meetings. This will be especially useful for state and chapter registrars. The seminar is scheduled for Friday, September 30<sup>th</sup> from 1:00-3:00 PM in Citation Rm. B. Check your packet when you arrive at the Meetings in case there is a change.

**Review of Applications.** Today new member applications received on 6 June and supplemental received on 3 May were being reviewed--about 11 weeks and 16 weeks respectively after they were received. This is information usually at the end of an Email to the State Points of Contact, but this time it needs to be at the beginning with details. A number of people have been asking about the reasons why the gap is so great in August, a time of the year when it is usually diminishing. Some have pieced together reasons from past emails and my report to Congress, but the information needs to be tied together in one place.

The main reason for this length is the staff time available to review applications in the Genealogy Department. This is a combination of the staffing level and staff absence.

Staffing in the Genealogy Department was 5.2 persons, full plus part-time, when I became Genealogist General in July 2014. That fall the level was reduced to 4.2 persons. In May 2015 a 3 day per week a "floater" staff member who sometimes had duties in other departments was added, bringing the level to 4.8 persons, less duties in other departments. In May 2016 the "floater" was assigned primarily to the Merchandise Department, reducing the level back to 4.2 persons. In mid-July a part-time employee working 10 hours per week was added, bringing the level to 4.45 persons. Current staff must devote time to train the new genealogist, a short-time loss of productivity. About the beginning of this month the "floater" returned to Genealogy, bringing the staffing level to 5.05 persons. Don Shaw informs me that he is planning to request the addition of another 3 day per week genealogist.

Unusual absences several months ago compounded the problem of the staffing level at a time when we normally begin to reduce the time an application awaits review. Use of sick days here and there and some vacation time is normal, and this did occur. What was abnormal was the absence of one full time staff member for over a week due to illness and death in the family and an auto accident and a part-time staff member for 3 weeks recovering from eye surgery.

For January through July the number of applications received in 2016 was 3,377, 118 more than the same time period in 2015 and 388 more than we had received in the first seven months of 2013 back when our staffing level in Genealogy was 5.2 persons.

Every staff genealogist reports a decrease in application quality during the last year. The genealogists have spent more time trying to locate needed information, and when unsuccessful corresponded with state points of contact. Unfortunately, we do not have an objective measure of this problem. The number of applications pended upon initial review is such a measure, but not available in our information system. The genealogists believe a cause has been an unusually high turnover in state registrars, with the new officers learning the how to review applications.

Don Shaw reports that during the last year there has been an increase in telephone calls with genealogy questions, interrupting staff. The genealogists have the details about applications they are reviewing, but please email your more general genealogy questions to me.

The Genealogy Department has had more work and less staff to do it. In the foreseeable future there will be additional work. SAR is moving towards a genealogical research system. One component, the Application System, will enable the Office of the Registrar to capture information about the applicant from the electronic copy, avoiding the need to enter the information like the applicant's address manually. The current system does not provide for comparable benefits for the Genealogy staff, although there may be some efficiency implemented in the future. However, there will be additional tasks to perform. Documentation will need to be scanned for newly received applications. Staff will need to assign a patriot number to each application. This will involve determining whether there are previous applications approved for the same patriot. All applications on the same patriot will have the same Patriot Number in addition to the unique ACN for each application. The availability of a genealogical research system will make it easier to prove lineage and service, increasing the number of applications we receive. DAR's highly successful genealogical research system is one factor that enables them to approve approximately 13,000 new members per year, over three times the number SAR is approving.

**Advances Coming in Availability of Revolutionary Tax Lists.** The Atlantic Middle States Association meeting in Albany provided an opportunity to arrange the posting of additional Revolutionary tax lists that provide evidence of Patriotic Service.

- Delaware SAR will post lists that are in the Delaware Public Archives. With very few exceptions, each list is for a particular hundred or part of a hundred in a county for a specific year. All three counties have numerous lists extant:
  - Kent County—32 lists from 1777, 1778, 1779, 1780, and 1782 representing five of the hundreds that make up the county;
  - New Castle County—71 lists from 1777, 1778, 1779, 1780, 1781, 1783 representing nine of the hundreds; and,
  - Sussex County—33 lists from 1778, 1779, and 1780 representing thirteen of the hundreds.

The Delaware lists need formatting and re-ordering before they can be posted, which will take some effort.
- Virginia SAR will post lists that are primarily on paper in the Library of Virginia and not readily accessible.
  - Most lists are for taxes that were payable in a set amount of commodities, or in the parlance of the day “specific taxes.” These lists do not cover all counties and are incomplete for the counties represented. However, some may include names of taxpayers who died or moved from Virginia before the more extensive 1782 and 1783 personal property and land tax lists.
  - The two extant lists of taxes to raise bounty money for Continental army recruits will also be posted. These Richmond and New Kent Counties lists name not only taxpayers, but identify those who where enrolled in the militia.
  - A payment list for the 1782 Williamsburg land tax will be posted. The corresponding assessment list is not extant.
  - Several lists procuring supplies will be posted. The names of some of the men selling supplies are not among the records of the Virginia Public Claims.
  - A 1778 Isle of Wight County list for a tax supporting the war effort will be posted.

Virginia SAR has received images of the lists. The Library of Virginia's permission to post them has been sent for review by the Virginia SAR Chancellor. The extensive 1782 and 1783 personal property and land tax lists, available on microfilm through interlibrary loan and many available commercially on-line, are not being posted.
- Empire State SAR will post lists that are in the New York State Archives, the only New York Revolutionary tax lists known that provide evidence to patriotic service. The Empire State

SAR Chancellor has reviewed documents to ensure that the SAR has the right to post the lists. Lists that provide evidence of Patriotic Service are extant for only five counties:

- Albany County—1779 lists covering 19 districts or wards are extant.
  - Dutchess County—One 1779 list, for Southeast Precinct, is extant. The Revolutionary lists in the Office of the County Clerk have been examined and do not provide evidence of Patriotic Service.
  - Orange County—Two 1779 lists for Cornwall and Goshen Districts are extant, and one 1780 list for Cornwall District is extant. The Empire State SAR has started the process of obtaining a copy of an extant 1779 Orangetown list.
  - Ulster County—1779 lists for Hanover and Rochester Precincts are extant.
- The Empire State SAR plans to index these lists, a great service to SAR and the public!

Maryland SAR has already posted copies of the Revolutionary tax lists that provide evidence patriotic service at their website: <https://www.mdssar.org/membership/marylandtaxlists> . There is at least one list posted for each Maryland County except St. Mary's.

For further information about Revolutionary tax lists and the laws authorizing them, see the reports of the Subcommittee on Revolutionary Taxes at <https://sar.org/revolutionary-taxes-report> .

### **Using a North Carolina Tax List that Did NOT Support the War to Prove Patriotic Service.**

No 1779 North Carolina tax list provides direct evidence that those listed performed Patriotic Service. However, a number of 1779 assessment lists provide indirect evidence that many took the oath of allegiance to the state. “An Act for Ascertaining what Property in this State shall be deemed Taxable Property, the Method of Assessing the same, and Collecting the Public Taxes and other Purposes,” passed 19 January 1779, states:

That the Moravians, Quakers, Minonists, and Dunkers shall pay a three fold tax and all others who shall refuse to take an oath of Allegiance as the Law directs, shall also pay a three fold tax, and if any person coming within either of the aforesaid denominations, or refusing to take the oath as aforesaid, shall fail to return and inventory of his taxable property, according to law, the person so failing shall pay four times the tax which shall be assessed on persons in this state who comply in every respect with the laws thereof. [*The State Records of North Carolina*, Vol. 24, p. 204].

A number of 1779 assessment lists identify some taxpayers as subject to a treble or quadruple tax. A list provides indirect evidence that your ancestor took the oath of allegiance if your ancestor was charged the single rate and some others on the same list were charged treble or quadruple rates. SAR has accepted several applications using this indirect evidence.

This proof of service using indirect evidence follows a basic pattern.

1. The Revolutionary government acknowledged a particular right or benefit only for those who performed a particular action.
2. A record exists showing the government acknowledged the particular right or benefit for the ancestor.
3. Therefore, the ancestor performed that action.

For the particular actions that provide evidence of Revolutionary Service, see the SAR Policy Manual, Section 2.0000 and subordinate sections. Both the government limiting a right or benefit to those who performed a Revolutionary service and a record showing that government identified the ancestor as entitled to the right or benefit are required. We cannot, for example, accept as proof of service that a man took the oath of allegiance or served in the militia merely because the law required it for men of his age.

Regards  
John

## **Email # 21 to State Points of Contact**

20 July 2016

Many of the topics discussed at the Congress in Boston concerned genealogy. So much was covered that this message will address very little other than what discussed at the Congress.

**Scanning Documentation.** Scanning our documentation is critical not only because it is needed for the Genealogical Research System, but virtually none of the documentation has a backup. A proposal from FamilySearch was presented to Congress which would provide that "...SAR Membership Applications with their associated supporting documentation from the earliest to present be digitally photographed, electronically indexed and made available to the public for personal family history research." SAR would mark with a red dot all documents that should not be made publicly accessible.

The proposal as presented is not acceptable, which was readily acknowledged when it was presented to the Congress. I will mention only three of the problems here, not all of which were discussed.

- Protection of privacy is inadequate. For example, FamilySearch stated it would not redact data from applications. Furthermore, SAR has already created digital images of over 77,000 of the most recent applications. There is no obvious need for FamilySearch to digitize and release images of these applications.
- There are no requirements for the quality of the electronic images SAR is to receive.
- Protection for SAR's property rights and protection for its future revenue from the sale of record copies and applications is inadequate. The proposal entitles FamilySearch to "...use or transfer the Digital images for any purpose without limitation." By contrast, SAR must agree not to distribute or license digital copies of the images or indexes, or permit copying or distribution of substantially all the images and indexes.

From the discussion at Congress, it appears that contact with FamilySearch involved only a limited number of staff members. Neither the Genealogy Committee nor the Genealogist General was involved in developing the proposal. Congress authorized continued discussions in hopes that a satisfactory proposal can be developed. However, SAR committees and general officers with knowledge of the requirements must be involved from this point forward.

We were told orally that duplicate documentation would be removed from the files prior to scanning. This was not part of the proposal, but is a serious error in planning. When a person orders documentation, SAR delivers all documents associated with a particular application. If the copy of a will, for example, is removed from one application because it was provided with a second application, an order for the documentation of first application will be incomplete. Moreover, the user will be without information of what to order to obtain it.

**Patriot Index System.** The Trustees approved \$70,000 for a Patriot Index System. System specifications have not been developed, but the vision of this system as presented by the staff to the Trustees and Delegates does not appear to be in alignment with either the DAR Genealogical Research System, the paradigm for such systems, or the SAR genealogical community. The system would cover "...applications, supporting documentation, patriot biographies, grave locations and any other information we may have available." This system must guide prospective members and those helping them to information required and accepted for applications. Applications have undergone an independent review at the national level using the standards in place at the time, and applications state service and lineage. This review has been by professional genealogists since well before I became a member 33 years ago. Neither patriot biographies nor

grave registrations undergo national level review. Authors of biographies are welcome to include unproven family tradition. This is appropriate, as tradition should be preserved to suggest possible direction for future research, but it does not belong in an application. The DAR GRS, the paradigm for an excellent genealogical research system, is restricted to application and documentation data even though they require professional, national level review before a chapter is permitted to place a patriot grave marker.

I have no objection to a master index, but the different types of records must to be treated as distinct series to preserve the credibility of the highest quality information we are disseminating. Searchable terms for applications and documentation will include information not found in other kinds of records. Neither the Genealogy Committee nor the Genealogist General saw the material presented to Congress before it was distributed. SAR committees and general officers with knowledge of the requirements must be involved from this point forward.

**Approved Bylaws Amendments.** The Genealogy Committee had proposed several Bylaws amendments to the Bylaws Committee. The Bylaws Committee recommended all for adoption, and Congress in fact adopted them. These included eliminating the obsolete requirement that applications be submitted (to National) in duplicate, clarifying the language for approving applications by grandfathering, and making the Genealogy Committee a standing committee.

**Bylaws Amendments Not Approved.** The Bylaws Committee recommended that two amendments concerning applications be referred to the Genealogy Committee, one involving who can sign applications for junior membership and one concerning memorial membership. The Chairman of the Genealogy Committee and the Genealogist General supported this recommendation, and Congress voted that they be referred to the Genealogy Committee.

**New Application System Forms.** The Bylaws require that the trustees approve the application form. The Trustees previously encouraged the use of the new application system and a prototype was made available. However, the Trustees did not explicitly approve the application form. The trustees approved the use of forms produced and submitted from the prototype system, and approved a form that will be produced from the new application system after three additional changes are made.

- (1) The signature of the approving genealogist will be added.
- (2) A space for the residence(s) of the patriot during the Revolution will be added. This information is required by the Bylaws and should be included on the application.
- (3) Language will be restored that the applicant attests to the accuracy of the application, to the best of the applicant's knowledge.

No action was proposed to disallow use of the older forms that have remained in use. Although the Trustees and the Delegates to Congress were told of the importance of using the electronic applications, in fact the software does not support the validation of electronic version of applications by the SAR genealogy staff. The electronic applications can be used for loading data about a new member, such as his address, into our member data base. This does save time in the Office of the Registrar.

Genealogy Committee Chairman Faulkinbury has developed a tutorial for the new application system which will be quite helpful in training users.

**The New SAR Website.** The new SAR website was installed and the old site retired shortly before Congress. This was not the decision of the IT Committee. I have received numerous complaints that genealogical material is no longer available, that material at the new site is not organized in a logical way making it difficult to find, and that the search function is unreliable.

Some information from the old website is still available at Archive.SAR.org. However, many of the links at this site have been disabled. For example, when one clicks on the Genealogy tab at this site an error message is generated: “404 This page is not available.” The transition to the new website is tantamount to a serious and effective denial of service attack. I have requested that President General Tomme direct that the new site be removed from use and a working copy of the old site restored.

Some pages are still available at Archive.SAR.org even when the links are no longer working. Jessie Hagan informed me of a way to gain access to them, and I have modified his method. Start to navigate the archive site as normal, and use the search function. When you get a message that a page could not be found, this will typically be a page from the new website. In the URL (web address) replace “www” before “.sar.org” with “archive”. Hit return. This method was used to find the pages in Archive.SAR.org that are listed in the next paragraph.

As of today, one can find membership and genealogical material at the old site as follows:

- **Membership Costs** <http://archive.sar.org/Membership/Costs>
- **Genealogy Policy Manual** <http://archive.sar.org/node/1847> Bill Marrs has made this available through Sharefile. A copy is attached for your convenience.
- **Application Preparation Manual** <https://archive.sar.org/sites/default/files/docs/nssar-forms/Application%20Preparation%20Manual-2016-03-11.pdf> A copy is attached for your convenience.
- **Reports of the Subcommittee on Revolutionary Taxes**
  - [https://archive.sar.org/hq/genealogy/a\\_introduction.pdf](https://archive.sar.org/hq/genealogy/a_introduction.pdf)
  - [https://archive.sar.org/hq/genealogy/delaware\\_laws.pdf](https://archive.sar.org/hq/genealogy/delaware_laws.pdf)
  - [https://archive.sar.org/hq/genealogy/delaware\\_tax\\_lists.pdf](https://archive.sar.org/hq/genealogy/delaware_tax_lists.pdf)
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  - <https://archive.sar.org/hq/genealogy/maryland.pdf>
  - [http://archive.sar.org/hq/genealogy/maryland\\_rev\\_tax\\_records.pdf](http://archive.sar.org/hq/genealogy/maryland_rev_tax_records.pdf)
  - [https://archive.sar.org/hq/genealogy/new\\_jersey\\_laws.pdf](https://archive.sar.org/hq/genealogy/new_jersey_laws.pdf)
  - [https://archive.sar.org/hq/genealogy/new\\_york\\_laws.pdf](https://archive.sar.org/hq/genealogy/new_york_laws.pdf)
  - The New York List report at the old website is obsolete. The current report is attached.
  - [https://archive.sar.org/hq/genealogy/north\\_carolina\\_laws.pdf](https://archive.sar.org/hq/genealogy/north_carolina_laws.pdf)
  - [https://archive.sar.org/hq/genealogy/pennsylvania\\_laws.pdf](https://archive.sar.org/hq/genealogy/pennsylvania_laws.pdf)
  - [https://archive.sar.org/hq/genealogy/pennsylvania\\_lists.pdf](https://archive.sar.org/hq/genealogy/pennsylvania_lists.pdf)
  - [https://archive.sar.org/hq/genealogy/virginia\\_laws.pdf](https://archive.sar.org/hq/genealogy/virginia_laws.pdf)
  - [https://archive.sar.org/hq/genealogy/virginia\\_tax\\_records.pdf](https://archive.sar.org/hq/genealogy/virginia_tax_records.pdf)
- **Consolidated Emails to State Points of Contact**  
[http://archive.sar.org/hq/genealogy/consolidated\\_emails\\_to\\_state\\_points\\_of\\_contact\\_5-18-2016.pdf](http://archive.sar.org/hq/genealogy/consolidated_emails_to_state_points_of_contact_5-18-2016.pdf)
- **Proving Service at the Battle of Point Pleasant for Sons of the American Revolution**  
[http://archive.sar.org/hq/genealogy/Proving\\_Service\\_at\\_the\\_Battle\\_of\\_Point\\_Pleasant.pdf](http://archive.sar.org/hq/genealogy/Proving_Service_at_the_Battle_of_Point_Pleasant.pdf)
- **Virginia Land Certificates as Evidence for the Oath of Allegiance** (This was erroneously placed as a report of the Subcommittee on Revolutionary Taxes at the old website.)  
[https://archive.sar.org/hq/genealogy/virginia\\_land\\_grant\\_certificates.pdf](https://archive.sar.org/hq/genealogy/virginia_land_grant_certificates.pdf)
- **Forms** <http://archive.sar.org/NSSAR-Forms> Links on this page still working.

The following can be found at the new website.

- **New Application System** From the Home Page of the new site, click on Members Portal and then in the upper left on My Applications (even if you do not have any applications). Or, [https://members.sar.org/my\\_applications](https://members.sar.org/my_applications)

- **Patriot Search** At the new site at <https://sar.org/genealogy/patriot-search> Click on the rust colored link. The common convention of putting links in blue was not followed by the system designers.

**New Staff Member.** Martha Gammons moved to the Merchandise Department in May. Martha had been working three days a week, most of the time in Genealogy but some time in other departments as needed. Last week a new part-time genealogist, Evelyn McDaniel, started work. She will work two days a week on supplemental applications. Don Shaw informs me that Martha Gammons will probably be able to do some work in Genealogy in the future and will work on new member applications.

**Quality of Applications Received.** The staff genealogists have all told me that the quality of applications has declined during the last year. There is no consensus on exactly when this began. Several staff members have observed that when additional information is requested, several states provide the requested information almost immediately. This suggests that the information was found and in hand, but for some reason not submitted to National initially. Please do not withhold records to prove dates and places of birth, death, and marriage, and maiden name of wives not in the bloodline to the patriot (provided that they do not duplicate other evidence). This information is often needed to make a credible case that there are not identity problems. Forcing staff to prepare a request for information and then review it after the application has cooled for a day or more just slows the review process down.

**Email #20 to State Points of Contact  
6 June 2016**

**New York Tax Lists.** The Subcommittee on Revolutionary Taxes has reported on the Revolutionary tax lists in the New York State Archives. All of the lists in the Archives for the Revolutionary period supported the War and provide evidence of Patriotic Service for those on the lists. All lists are for 1779, with the exception of one 1780 list for the Cornwall District of Orange County. The extant lists are from the following counties:

Albany County	Orange County	Westchester County
Dutchess County	Ulster County	

A copy of the Revolutionary lists has been provided to the SAR Library. No lists are extant for the Clinton or Tryon (later Montgomery) County, or the five counties occupied by the British for most of the Revolution: New York, Richmond, Kings, Queens, and Suffolk Counties. Updates have also been made to the report on New York statutes to include more detail about key statutes. The reports can be found under the Genealogy Tab at [www.SAR.org](http://www.SAR.org).

FamilySearch.org has copies of additional Revolutionary tax lists for Albany and Dutchess Counties. Examination of these lists is underway to determine whether they meet SAR criteria for Patriotic Service.

**Proof of Service Using Virginia Land Certificates and North Carolina Land Entries.**

Recently a chapter registrar inquired about whether Virginia certificates for land claimed by right of settlement or pre-emption during the Revolution provide evidence of Patriotic Service. He correctly observed that under statute a person making such a claim for land had to swear allegiance in order to qualify for a certificate. Presuming that Virginia followed its own laws, it follows that a person who was awarded such a certificate took the oath of allegiance even though no list of such oaths is extant, and probably never existed. The SAR has already accepted Virginia certificates awarded for right to land by preemption or settlement as evidence of Patriotic Service. Proof of service using indirect evidence is authorized under Section 4.0001 of the SAR Genealogy Policy Manual.

Virginia established four commissions to take evidence, administer oaths of allegiance, and award certificates. The counties of Monongalia, Yohogania, and Ohio, formed one district; the counties of Augusta, Botetourt, and Greenbrier, formed a second district; the counties of Washington and Montgomery, formed a third district; and the county of Kentucky formed a district by itself. Proceedings of two of the commissions have been published. The Kentucky certificate book was published in *The Kentucky Historical Register*, Volume 21, #61 (1923) and reprinted as *Certificate Book of the Virginia Land Commission, 1779-1780*. The proceedings held in Monongalia County were abstracted and published in *The Transalleggheny Historical Magazine*, Volumes 1, #1-4 (1901-1902) & 2 #1 (1902). I have provided copies from *The Transalleggheny Historical Magazine* to the SAR Library and a short paper on Virginia certificates has been posted under the Genealogy Tab at [www.SAR.org](http://www.SAR.org).

Proofs of service using indirect evidence follow a basic pattern.

1. A copy of a statute or law is provided showing that for the government to grant a benefit or recognize a particular right, the person must have performed a particular action. In this case, Chapter 27 of the October 1779 session of the General Assembly states:

No certificate of right to land for actual settlement or of pre-emption right shall hereafter be granted by the said commissioners, unless the person entitled thereto hath taken the oath of fidelity to this commonwealth, or shall take such oath before the said commissioners, which they are hereby empowered and directed to tender and administer; except only in the particular case of the inhabitants

of the territory in dispute between this commonwealth and that of Pennsylvania, who shall be entitled to certificates upon taking the oath of fidelity to the United States of America. [Hening, William Waller: *Statutes at Large*, Vol. 10, p. 179)

2. A copy of a record is provided showing that the government granted that benefit or recognized that right for the ancestor, with the name of the ancestor, date, and the right or benefit underlined. For example, an applicant might submit the record of the Virginia's Kentucky County commission showing that his ancestor John Fleming was granted a certificate for 1,000 acres by right of preemption in the session of 21 April 1780, with the date of the session, ancestor's name, and favorable decision of the commission underlined.
3. A short proof argument is provided, stating that
  - a. the government required a certain action by those in order for it to grant a particular benefit or recognize a particular right;
  - b. the government granted that particular benefit or recognized that particular right for the ancestor on a particular date when the statute was in force;
  - c. therefore the ancestor performed the action required by the government; and
  - d. SAR recognizes that action as Revolutionary Service.

IN THE CASE OF THIS EXAMPLE, the proof argument could be:

- a. Under Ch. 27, Oct. 1779 session, Virginia required that those granted a certificate for land by right of settlement or preemption had to take the oath of allegiance (copy of statute attached).
- b. Virginia's Kentucky commission approved a certificate for land by right of preemption for John Fleming on 21 April 1780 (copy for record attached).
- c. Therefore, Virginia recognized that John Fleming took the oath of allegiance.
- d. SAR recognizes taking the oath of allegiance as Patriot Service.

The SAR also accepts North Carolina land entries as evidence that the person receiving the entry took the oath of allegiance. North Carolina law required that

...every Person ...before he shall enter a Claim for any of the Lands aforesaid, shall take and subscribe the Oath, or Affirmation, of Allegiance and Abjuration, prescribed by the Law of this State, which Oath the Entry Officer is hereby impowered [*sic.*] and required to administer....[Clark, Walter: The State Records of North Carolina, Vol. XXIV, pp. 43-44]

Those absent in the service of the state or the United States and guardians claiming for an orphan child were exempted from the requirement. As in the case of Virginia, there is no record, and probably has never been a separate record, of those to whom the Entry Officer administered the oath of allegiance, and the SAR has accepted land entries as evidence of Patriotic Service.

Web addresses (URLs) for online copies of Revolutionary statutes for a number of states can be found in the reports of the Subcommittee on Revolutionary Taxes at the Genealogy Tab at [www.SAR.org](http://www.SAR.org).

**Genealogical Research System.** Some of our general officers are not familiar with the capabilities and benefits of a genealogical research system. Mike Tomme and I have agreed that I will brief the new Executive Committee on this subject. DAR certainly has more members to conduct recruiting, but their Genealogical Research System is a major reason why they are able to recruit about 13,000 new members each year. The total SAR membership at the end of 2015 was 30,808 members. SAR must give priority to investing in what we need for recruiting if we are to improve our growth, something that also will provide outreach to the public.

**Processing Time.** New member applications are being processed about 10 ½ weeks after they are received, and supplemental applications are being reviewed about 11 weeks after they are received.

**Email #19 to State Points of Contact from the Genealogist General**  
**14 May 2016**

**Missouri SAR Educates Members on Genealogy.** The Missouri SAR conducted two genealogy workshops to commence its Annual Meeting April 29<sup>th</sup> and 30<sup>th</sup>. The Missouri SAR is to be commended not only for providing an opportunity for its members and their spouses to learn more about genealogy, but succeeding in getting excellent participation. At the Friday morning session there were about 80 people present.

**Genealogical Information at the SAR Website.** A number of our members are not aware that important information for proving service, lineage, and completing applications can be found under the Genealogy tab at [www.SAR.org](http://www.SAR.org). This includes the Genealogy Policy Manual, the Application Preparation Manual, reports of the Subcommittee for Revolutionary Taxes, and a paper on proving service at the Battle of Pt. Pleasant. The Genealogy Policy Manual governs important matters, including what actions constitute Revolutionary Service for SAR membership and what is admissible and inadmissible as evidence. A decade ago this information was not available and apart from the old Form 912, our genealogy policies were not written and accessible. We have come a very long way thanks to the Genealogy Committee.

**Tax Lists.** The number of applications relying on tax lists for evidence of service has been steadily increasing. For some states, such as Maryland and Virginia, there is extensive coverage late in the War, when those who straddled the fence early had less reason to be cautious. Use of tax lists can be difficult because lists for taxes that supported only civil functions are not acceptable for Revolutionary service. Qualifying lists must have been mandated by a law that supported the War or responded to a request of the Continental Congress. The Subcommittee on Revolutionary Taxes has been reviewing both state laws and Revolutionary Tax lists to lighten the burden of proof for applicants. Reports of the Subcommittee can be found under the Genealogy tab as [www.SAR.org](http://www.SAR.org). This is an overview. See the reports.

The Subcommittee has prepared reports for particular lists for five states, identifying those which provide evidence of Patriotic Service and which do not. Detailed instructions are in the reports to assist applicants in identifying qualifying lists and determining what to submit with the application. If the ancestor appears on a qualifying list, the applicant needs to identify the list, providing pages from the list that enable the reviewing genealogist to confirm the identification of the list, as well as the page bearing the name of the ancestor. Sometimes additional pages from a list should be provided to establish the date of the list or the jurisdiction within a county where the ancestor resided. When it is a matter of matching the title from a list with the title quoted in the report, providing copies from both the list and the report with the title underlined in each is an easy way to identify the list as acceptable to SAR. Where titles pages are not available, as in the case of some accessible copies of Pennsylvania lists, or the names have been provided by a state archives, as in the case of Virginia land and personal property tax lists, instructions in the reports need to be followed.

**Delaware**—The report gives the title and other identifying information for qualifying lists in the Delaware Public Archives from all three counties as early as 1777 until the end of the War. In general, applicants should submit the page bearing the title of the list or other identifying information, and the citation in the references section should include the name assigned to the list in the Subcommittee report.

**Maryland**—Qualifying tax records in the Maryland State Archives are posted at the Maryland SAR website for all counties except St. Mary's, and a collection ledger for part of Prince

George's County has been posted by the Maryland State Archives. Most lists are for 1782 or 1783. Each list begins with a table of contents added by the Subcommittee to aid applicants in finding the pages for the various hundreds in the county for that year. Specific instructions on what pages to submit are in italics below the table of contents. Applicants should read instructions with care. Many lists have sections listing paupers, who paid no taxes and therefore did not perform Patriotic Service paying that tax. A few lists note those fined for not cooperating with assessors, which disqualifies those individuals for service for paying that tax.

***New York***—This report is in draft and will be forthcoming in the near future. One list is for 1780, and the rest are for 1779. The lists are in the New York State Archives from Albany, Dutchess, Orange, Ulster, and Westchester Counties, except for one list in the Albany County Archives. Albany County appears to be reasonably complete. Additional lists in various county archives have not been examined. Each list is given a name assigned by the Subcommittee, and the title or heading from the list itself essential in identifying the list is included in the report. In almost all cases, the title page of the list should be provided, but applicants should follow the instructions in the report. In some cases, a subtitle identifying the district or precinct within the county is important.

***Pennsylvania***—Two reports covers lists in the Pennsylvania State Archives. One is an inventory of the holdings of the Archives has been accepted by the SAR as definitive in identifying which taxes provide evidence for Patriotic Service:

- supply taxes from 1778 through 1783;
- exoneration lists from 1780 through 1783; and
- liquor excise payments made between 6 April 1781 and 26 November 1783.

The other is a report on how to identify qualifying tax lists and what to submit with an application.

Pennsylvania is tricky for two reasons. Some of the lists were published in the ***Pennsylvania Archives, Series 3***, with titles other than those on the original lists. Ancestry.Com has posted many of these lists, but the title pages are difficult to find and in some cases not posted. Microfilms of the lists held by the Archives are available at some genealogy libraries. I myself downloaded pages bearing the name of an ancestor from Ancestry.Com, but I could not find the titles of the two lists at Ancestry. I copied the title pages from microfilm at the DAR Library. However, an alternative was to use the inventory report mentioned above to identify the lists.

***Virginia***—The report on Virginia lists covers tax lists in the Library of Virginia, most among the records of the Auditor of Public Accounts (APA). 1782 or 1783 Personal Property or Land Tax records are extant for all 74 counties and cities except Chesterfield. About 2/3 of these are available on-line commercially at BinnsGenealogy.Com. Specific taxes (taxes payable in certain commodities) are identified for 16 counties. The report covers a very few lists that are among county records or special records, rather than APA records.

For lists of Specific Taxes, applicants will usually match the title from a list with the title given in the report. Additional pages may be required to determine the year. For 1782 and 1783 land and personal property assessment rolls, the cover of the booklet in addition to the title page of the list should be submitted. The cover style is a hallmark of these taxes and makes it easier for reviewing genealogists to identify the list. Please see the detailed instructions in the report.

Although the Subcommittee has not reported on the lists of ***Georgia*** and ***South Carolina***, to the best of our knowledge no Revolutionary lists for Georgia are extant, and only a few 1783 South Carolina lists are extant, none of which are qualifying.

The reports on tax records are usually not complete. The New York and Pennsylvania cover what is extant in the state archives, but we know there are additional Revolutionary lists in county archives. In Virginia we have identified assessment rolls and payment lists in the records of the Auditor of Public Accounts, which are in the Library of Virginia. We know that there are additional rolls and lists among county records and special collections in the Library, only a few of which we have examined. To the best of our knowledge, we have identified all Delaware and Maryland Revolutionary tax lists at the Delaware Public Archives and the Maryland State Archives and we know of no other Revolutionary tax records.

If the applicant is using lists of a state on which the Subcommittee has not reported or the applicant has found a list not examined by the Subcommittee, the burden is on the applicant to prove that the list bearing the name of his ancestor was mandated by a law that authorized a tax supporting the War or addressing a request of the Congress. This requires a proof argument identifying which law mandated the list. For six states the Subcommittee has reported which tax laws did and did not meet the SAR requirements:

Delaware	New Jersey	Pennsylvania
Maryland	New York	Virginia

For other states applicants must provide a copy of the tax law, identifying language in the title or body of the text that shows that law meets SAR requirements.

Some applicants are simply submitting a list with nothing to show the list for a tax that supported the Revolution. When I was in Louisville at the end of April one genealogist produced a printed Pennsylvania list from a book that she had received. The list was unidentified. That genealogist went on-line and found images of the original list from the Pennsylvania State Archives at Ancestry.Com. The next step was to check the inventory of tax lists provided by the Archives, which identified the only list in its inventory for that county and year as a supply tax. When staff must go to that extra effort to validate service, it takes review time and contributes to the lag between an application being received and being reviewed.

**Changes in Bylaws Concerning Genealogy.** Proposed Bylaws amendments were emailed from SAR Headquarters on May 2<sup>nd</sup>. Five of these concern genealogy matters. Three of the five were recommended unanimously by the Genealogy Committee to the Bylaws Committee. These were to eliminate the requirement that applications are to be submitted in duplicate to National, to tighten the language concerning grandfathering applications in accord with the spirit of the Bylaw, and to make the Genealogy Committee a standing committee. I strongly support all three of these proposed amendments.

The two remaining proposals were submitted by a staff member to the Bylaws Committee and concern signatures on Junior and Memorial Applications, whereby the signatory swears and certifies that the application is accurate to the best of his knowledge and belief. In the case of Junior Member applications, only a parent or guardian would sign, not the applicant himself. Under a policy passed by the Genealogy Committee some years ago, an applicant for junior membership, his parent, or his guardian can sign a junior member application. Memorial Applications would be signed “by the submitting SAR family member.” This raises questions about who an SAR family member would be. Bylaws should not raise more questions than they settle. I am forwarding to you a short paper explaining the position of Genealogy Committee Chairman Jim Faulkinbury and me on these five proposals.

**The queue.** Both new-member and supplemental applications are being reviewed about 9 weeks after they are received.

## **Email # 18 to State Points of Contact from the Genealogist General 6 April 2016**

**New Email List.** A new email list is being used for this distribution of this message. Updates that have been provided to SAR in Louisville have been incorporated. If there is a misspelling of your name, or if you should not be receiving this email, please let me know.

**Acceptable Sources.** At the Spring Leadership Meeting we had a workshop on acceptable sources. SAR has long required people providing information have had knowledge of the facts at issue. Ideally books and articles will cite sources explicitly. In other cases, the source can be identified by a careful reading of the text. For example, sometimes a family history will give information about a family, but only one branch will be traced down to the time the book was published. Normally we assume that a person had knowledge of parents, grandparents, aunts and uncles, and grand aunts and grand uncles. However, evidence that a person was in a position to have knowledge of other particular relationships will be considered.

Sometimes key information needed to identify the source is on a different page in a book or article. It is important to provide copies of those pages, along with the title page and page(s) of data. Recently an application was pended because those pages were not provided. It was easy enough to remedy this omission, but had the information been provided in the first place it would have saved the time of pending the application, preparing and sending an email to the state registrar, the state registrar preparing and sending an email back with the needed pages, and the genealogist preparing and sending an email acknowledging that the additional information was sufficient. All of this slows down processing applications and costs the SAR staff time.

There are cases in which books and articles have been accepted for years, but no longer meet SAR's standards. When standards change or when a mistake is made in accepting a source, it should no longer be used. We should not perpetuate mistakes and undercut current standards by continuing to accept such sources. However, if a proof of lineage no longer meets current standards (but is not disproved), close relatives can "grandfather" in under our Bylaws.

SAR has been making progress in bringing its standards and practices up to date. Chapter and state registrars can assist in this effort by reading and understanding the SAR genealogy policies concerning acceptable evidence.

**Citation of Sources.** SAR has long said that if there is not enough space for citations for a generation, an applicant can add a sheet of paper with the additional information as part of the application. For proofs of lineage using indirect evidence, especially proofs using a process of elimination requiring evidence to rule out at least one other possible ancestor, many documents often need to be cited. One would expect many applications to include an extra page, or at least use the citation space for unused generations. Unfortunately, staff confirms this is seldom the case. Usually the citations simply become terse. Before I started using a Microsoft Word version of the application that enabled me to adjust space as needed, I too would abbreviate citations to make them fit within two lines. I have commented a number of times that I really hate looking at a record copy where the citations are so terse that I cannot figure out what the source was, especially when I was the one who prepared the application.

The new application system allows as many lines as one needs for the citation of references for a generation. I recently prepared a new-member application for which I needed only one line for full citations for Generations 1 and 2. Three lines were needed for Generation 6 and four for Generation 8. The system did not allocate blank lines for any generation, and allocated only

space for the applicants' one wife and no blank generations beyond the patriot. The line with the word "References" was blank after that word for each generation, giving staff space to add citations or a note, should that be necessary. If there are many generations and lots of space needed for citations, the system will continue on to a third page automatically. I was able to provide clear citations for each generation. Please advise chapter registrars that those helping applicants can and should break away from the old practice of making the citations extremely terse to get them to fit within two lines. The goal is to provide citations with sufficient detail that our genealogy staff and future researchers can identify the sources.

The new application system is a great step forward for using adequate citations. There are some problems with the presentation of citations which I trust will be remedied in the future. First, citations must be entered in a small box on the data entry screen. The user cannot see how many lines citations are taking for each generation. There is blank space to the right of the data entry box that could be used to display the citations on the screen as they will appear on the printed application. Second, the system prints a bold black bar along the left side of the citations. This takes up horizontal space and on one printed application obliterates the first character of the text for the next generation. Staff and I have requested the removal of this bar in future releases.

Those preparing applications are not the only ones who provide citations. Genealogists in Louisville often need to add citations, either for sources that they themselves found to be needed, or sources provided at their request after an application was pended. I have advised staff that they too need to provide citations that are sufficient for future researchers to identify and find the sources used.

**New Application System and the Need to Proof Read Applications.** The new system is browser sensitive. Blackstone has informed SAR staff that they are not supporting Version 6, 7, or 8 of Internet Explorer. I personally have had problems with font size and truncated lines when I access the system from the current version of Firefox, but not Chrome.

Staff genealogists have found all or part of a generation is sometimes printed twice. This problem can be detected if during review in the chapter and state the paper copy of the application is proof read. Any information about these problems would be appreciated.

**Delaware Revolutionary Taxes.** The Subcommittee on Revolutionary Taxes has issued a report on which Delaware tax lists in the Delaware Public Archives provide evidence of Patriotic Service. This is posted on the SAR website under a link at

<http://www.sar.org/Committees/Genealogy/tax-lists>

A total of 136 lists were found to have been mandated by laws supporting the Revolution.

**New York Revolutionary Taxes.** The Subcommittee on Revolutionary Taxes has reviewed the 42 Revolutionary tax lists held in the New York State Archives. These are available on microfilm through interlibrary loan. Except for one 1780 list, all of the lists are for 1779. Lists for the Revolutionary period are extant only for Albany, Dutchess, Orange, Ulster, and Westchester counties. The Subcommittee is updating its report on New York Revolutionary tax statutes. No additional statutes have been found, but we have found that the process of examining tax lists causes us to go back and add details that were omitted when a report on statutes was initially prepared. The Subcommittee is reviewing a final draft on which lists provide evidence of Patriotic Service.

**The queue.** New-member applications are being reviewed about 9 weeks after they are received and supplemental applications are being reviewed about 9 ½ weeks after they are received.

**Email # 17 to State Points of Contact from the Genealogist General  
9 March 2016**

**NEHGS Tour at Congress.** The New England Historic Genealogical Society (NEHGS) is opening its doors to compatriots and their guests at the 2016 SAR Congress 2016, as described at the Massachusetts SAR's website, <http://www.massar.org/congress> . This is a ticketed event limited to 100 attendees, with registration to open in early May. An invitation will be extended to state registrars prior to registration by the general membership.

**Genealogy Committee Meeting.** The Genealogy Committee adopted no policy changes at its recent meeting during the Leadership Meetings. The Committee did take several actions.

1. The Subcommittee on Texas Cattle drives reported that as of yet they could find no records naming Spanish patriots who provided cattle to support the Galvez expeditions. However a possible source was identified in the Bexar archives, but is not indexed to allow name searches. The Subcommittee will continue investigating this source.
2. John E. Sweeney reported on the problem of many states issuing birth certificates that give no indication that the parents named are adopting rather than birth parents. A change will be made in the Application Preparation Manual warning of this, and a statement is recommended above the applicant's signature that to the best of the signer's knowledge, the lineage on the application does not include any adoptions that would affect the line to the patriot.
3. The Committee approved use of the new application that is produced by new application system. The Committee recommended several modifications of the application, but did not require that these be made before the new form is used. These include:
  - a) adding a statement that the signature indicates that lineage does not include adoptions;
  - b) changing "References to Next Generation" to "References";
  - c) adding "Between" in the drop-down for "Before" After" and "About" for date fields and providing for two years if "Between" is used;
  - d) adding a feature for correcting dates in the incorrect format;
  - e) adding signature spaces for the Chapter Registrar and the Genealogist General.

**Genealogical Research System.** Information Technology Committee Chairman William Marrs has provided cost estimates for the next two modules of the SAR IT system. One of these will include the basic capabilities for a Genealogical Research System (GRS). The Budget Committee will address IT funding requirements for the budget to be submitted to Congress. The modules may have to be done over more than one year due to funding limitations.

More than software is needed. Some applications still have not been scanned, but staff is keeping up with scanning applications as they are approved. Essentially no documentation has been or is being scanned, the exception being documentation which someone has ordered. A more robust scanner than the one used for scanning applications will be needed for staff to keep up with scanning documentation as applications are approved. Documentation already received is a challenge. We have about 2.2 million documents on file. Two estimates have been obtained to contract the work out, both of which are close. This cannot be made public because the bids are proprietary. SAR is also exploring the possibility of having FamilySearch scan documentation at no charge to SAR. SAR would be responsible for preparing the documentation for scanning. Staff estimates the preparation cost to the SAR to be under \$50,000 in a year. If FamilySearch posted the documents so they could be downloaded/printed at no charge, SAR would lose revenue from sale of copies of documentation. DAR's GRS has provided them a very lucrative source of revenue as well as a valuable recruiting tool. SAR sells very little documentation due to the absence of readily available information that enables potential customers to identify the applications with promising documentation for a prospective member's lineage. This includes

the name, state, service, dates and places of birth and death of the patriot, each application number (ACN) approved for the patriot, the child of the patriot for each approved application, and a descendants index. Some of this information is available in the SAR Patriot Search, but there is more work to be done. Those not familiar with the power of a GRS for research and recruiting should click on GRS at the top of the DAR homepage, <http://www.dar.org>. I think you will see why so many chapter and state registrars are clamoring for a GRS, why DAR enrolled over 13,500 members again last year.

**Revolutionary Taxes.** The Subcommittee on Revolutionary Taxes has updated its report on Delaware tax statutes. This is posted on the SAR website under a link at <http://www.sar.org/Committees/Genealogy/tax-lists>

The Subcommittee approved a report on which Delaware lists in the Delaware Public Archives provide evidence of Revolutionary Service. It will be posted at the website after formatting.

**Proving the maiden name.** Many, very many, applications are pended because the bloodline to the patriot goes through a woman and the applicant did not prove the maiden name of the woman. We know that Richard Roe had a daughter named Jane and we know that John Doe had a wife named Jane, but the documentation provided has no evidence that Jane Doe was in fact the former Jane Roe. How do we know that Jane Doe was the former Jane Roe, and not Jane Smith, Jane Jones, Jane Green, etc.? The staff genealogists are quick to point this problem out, and alas, have lots of practice doing so.

A number of different records can solve this problem:

- A marriage record—bond, application for marriage license, license, return—will usually provide the maiden name. If the bride was a widow, there is more work to do.
- A will or estate distribution of the woman's father can state the married name of the daughter, with her maiden name obvious from the fact that she was a daughter.
- The death certificate of the woman will often state her maiden name. Sometimes married name is given instead, which is of no help.
- An obituary or death record.
- Sometimes a tombstone will provide the maiden name.

Indirect evidence may be needed. Sometimes one can identify a sibling of the woman and then find evidence proving who the sibling's parents were. Proximity, naming patterns, same religious affiliation, and other evidence is all useful, but no one fact is sufficient in itself. Some years ago I was trying to prove that the maiden name of one of my great great great grandmothers. I knew Sarah's date of birth from her tombstone. As a first step I examined the census records for the county in which Sarah should have resided just before her marriage. Only one Sarah was the right age. That led me to the father's estate papers, which provided more evidence.

The bottom line is that we need more than a leap of faith that Mrs. John Doe was the former Miss Rachel Roe. We need evidence of the maiden name. Such evidence can usually be found without tremendous difficulty, but sometimes it is one of those difficult searches making success all the more rewarding.

**The queue.** New member applications are being reviewed about 8/12 weeks after they are received, and supplemental applications are being reviewed about 8 weeks after they are received.

## **Email # 16 to State Points of Contact from the Genealogist General 31 January 2016**

**Genealogy Seminar at Leadership Meeting.** A genealogy seminar will be conducted at the Leadership Meeting in February. The subject, at the request of staff, will be what documents are admissible for consideration and what documents are not. At the present time the seminar is scheduled for Citation Room B, 1:30-3:00 PM. Please check the schedule after you arrive in case there are changes.

**Use of DNA in Proving Lineage.** Recently several applicants have submitted DNA evidence in an effort to prove lineage. Especially with the increased marketing for autosomal DNA tests, some applicants believe that DNA tests show more than they in fact do.

- Neither the Y-DNA test nor the autosomal test rules out that an applicant's lineage may be from a brother or cousin of the "target" ancestor he is trying to prove. SAR accepts Y-DNA and autosomal DNA evidence as one element of a proof using indirect evidence. Some years ago when I used Y-DNA evidence, I identified all the brothers of the target ancestor and used their wills and estate distributions to show that my earliest provable ancestor was not the son of any of the siblings of the target ancestor. (There was other evidence connecting my earliest provable ancestor and the target ancestor, to be sure.)
- Satisfactory evidence must be submitted for the lineage of the person that the applicant matches. An undocumented lineage from a family tree posted on the web does not prove that the matching person really descends from the target ancestor.
- Y-DNA is used for finding matches on the straight male line only. If a match is found with someone else who is a descendant of the target ancestor on a straight male line, that does not mean that the target ancestor is also the common ancestor. The same Y-DNA could also be found for anyone descended in the male line from the target ancestor's father, grandfather, great-grandfather, etc. That is why other evidence is needed to show that it came through the target ancestor: other evidence is needed in addition to the DNA evidence. If the applicant has women in the bloodline to the target ancestor, he must find a cousin on the straight male line with a proof of lineage back to an ancestor he himself can prove. In my own case I found a cousin on the straight male line who could also document his lineage back to a man born in 1800.
- Autosomal DNA tests report matches between two people without regard to whether they have all men, all women, or both men and women in their bloodline back to a purported common ancestor. "Matches" are based on the overall amount of common DNA between people who have tested. A child would share 50% of DNA in common with each parent. However, that child does not necessarily draw half of his paternal DNA from his paternal grandfather. In fact, the odds are against it. If against all odds a child drew the exact proportion of DNA from each of his or her great great grandparents, only 6.75 % of the DNA would come from any particular great great grandparent. The further back the common ancestor, the lower proportion of DNA is available to match. However, even if two autosomally matching individuals are truly related, it does not identify the line on which the common ancestor(s) are to be found. While the applicant may be focused on proving that John Doe and his wife were his ancestors, in fact the common ancestors could be Richard Roe and his wife. At Generation 7 an applicant will descend from 64 individuals, and the matching DNA can come from a combination of any of these. For each additional generation, the likelihood that a particular ancestor at that generation contributed DNA being compared will decrease on average by one half. As a rule of thumb, autosomal tests are not very reliable for identifying fourth and even third cousins.

Some have complained that DNA tests provide too many matches to be useful. I think this depends on the family name. For an uncommon family name where one suspects from the start that most of the surname are related, lots of matches are not surprising. However, for a name like Wilson or Jones—son of Will, son of John—one would expect most of the surname to be essentially unrelated, so that matches and mismatches take on greater significance.

Section 5.4000 of the SAR Genealogy Policy Manual, which is posted at the SAR website, states:

DNA evidence can only be used as one element of a genealogical proof argument that includes additional conventional proof of the lineage. Neither autosomal nor Y-DNA tests alone prove a descent from a specific individual. A DNA test can show with high probability that two individuals are related, but fail to determine whether the father was a particular individual, a sibling of that individual, or a cousin.

In addition to taking this to heart, applicants should read the fine print for the DNA tests they are considering. Compatriot Tim Peterman summed it up nicely when he said that DNA "...can support a lineage, but not prove it. DNA can disprove a lineage."

**Application Scanning.** The budget approved by the trustees included \$20,000 for scanning. It was undetermined whether this would be used to purchase a scanner for the Library or for scanning applications and supporting documentation in the Genealogy Department. No decision has been reached on expenditure of the funds, but I have asked that a decision be made. Both projects are important. The Genealogy Department has a scanner which enables staff to scan applications as they are approved. Some progress was made in scanning older applications at the end of the summer when the volume of incoming applications is slow, but this just puts us behind when the volume increases in the fall and the holidays and vacation time reduces the hours worked.

**Documentation Scanning.** No documentation has been scanned other than responding to orders. The Genealogy Department is not staffed to scan supporting documentation as applications are approved, much less start on the documentation already on file. This is of serious concern because the files are stored in a room with a water-based fire suppression system. Staff has been discussing the project with several potential providers of the service.

**ACNs, and P-Numbers.** Many do not understand ACNs (Accounting Control Numbers) and P-numbers (Patriot Numbers). Each application is assigned a unique ACN as part of the logging process when it is received. Some applications will be pended and ultimately expire or be withdrawn. These too have unique ACNs. Only when an application is substituted for an application already received is an ACN reused. ACNs were started in 1998. Jessie Hagan has assigned and stamped an ACN on older applications between 1985 and 1998, but the present computer system does not accommodate these numbers. The ACN is used by staff in finding applications, including requests for record copies. Even when the ACN is not in the data base, the number enables Jessie to estimate where in the sequential collection of applications the requested application can be found. *When requesting a record copy or at the present time communicating with a staff genealogist, use the ACN or member number with name of the patriot, not the P-number.* When relying on a DAR application for proof, you must submit a record copy and should cite the member number and name of the patriot, not the DAR Ancestor Number.

The ACN by itself is of limited use to a person using a Genealogical Research System (GRS) similar to what DAR has. An applicant, whether a prospective member or a current member pursuing a supplemental, will often start with a possible patriot's name and state, and perhaps an idea about dates and places of birth, death, and spouse. DAR has approved applications on 25

distinct men named John Smith who served from Massachusetts. At least three ladies had been approved under each of a handful of men that I spot checked, so we are talking about well over 100 approved applications. Expecting a member to search through all of these is unrealistic. However, the DAR's descriptive information in its GRS enables the user to focus on a promising patriot or patriots. An example of this information for one John Smith is:

Service: MASSACHUSETTS Rank: PRIVATE  
 Birth: 10-9-1758 NEEDHAM SUFFOLK CO MASSACHUSETTS  
 Death: 8-4-1838 GRAFTON WINDHAM CO VERMONT  
 Pension Number: S\*W19377  
 Service Source: S\*W19377; MA SOLS & SAILS, VOL 14, P 448  
 Service Description:  
 1) CAPTS SAMUEL KILTON, STOW, SMITH;  
 2) COLS JOHN PATERSON, THOMAS NIXON

DAR assigns a unique ancestor number to each patriot, and lists all approved applications by number with child of the patriot on a linked page. The Ancestor Number serves as a shorthand way for people to communicate which John Smith of Massachusetts they are talking about. The SAR P-number serves the same function as the DAR ancestor number, but at the present we lack the data base and computer system to do with our P-numbers what DAR does with its ancestor numbers. Without P-numbers or an equivalent, we will not be able to group applications with their unique ACNs together when they are for the same ancestor.

The P-Number is a unique number assigned by the Patriot Index/Revolutionary Grave Committee to each patriot for whom there is an approved application, a registered grave, or both. The current SAR system does not accommodate P-numbers. You see P-numbers when doing a Patriot Search, but that uses an Access Data Base developed by the Committee, not the National Society. Sadly, the Committee could not get support for their needs due to budget priorities. The members of the Committee are presently reviewing records to eliminate duplications. Several years ago there were three distinct entries for my ancestor Daniel Chapman, a pensioner who served in New York and died in Illinois. The Committee reviewed the records, recognized that the three entries were for the same man, and now has a single entry with up to date information. In the future as we move towards a genealogical research system, or should I say if we move towards a genealogical research system, staff genealogists will be expected to determine whether an application on a patriot whom SAR already recognizes or is on a new patriot. Without the Herculean effort of the Committee members, we would not be nearly so far along as we are.

**Revolutionary Tax Lists.** Delaware Revolutionary tax lists in the Delaware Public Archives have been examined. Draft recommendations for which lists provide evidence of Patriotic Service have been sent to the Subcommittee on Revolutionary Taxes for review and decisions. A final report is not expected before summer. In the course of the review, additional information about statutes was found to be useful in identifying the tax law or laws that mandated particular lists. The report on Delaware Tax Laws has been updated by Tim McCabe with this new information. You can find this report at

<http://www.sar.org/Committees/Genealogy/tax-lists>

We thank Troy Foxwell for obtaining images of the Delaware lists and levy court minutes for us.

**Application Processing.** Both New Member and Supplemental Applications are being processed about 9 ½ weeks after they are received.

I hope to see many of you at the Leadership Meeting February 25-28. The Trustees will be asked to approve funding for major projects, setting SAR's financial priorities for years to come. Of necessity, if a museum is approved, it will exclude or delay many other worthy projects that

would improve access to our records and make research easier for members and prospective members.

Regards  
John

## **Email # 15 to State Points of Contact from the Genealogist General 12 November 2015**

**Communication to Chapters.** I recently received an email that neither the state nor chapter registrars in a particular knew of the changes in policy adopted in September, even though these were summarized in my Email #14, Email # 14 was posted at the SAR website after being sent to you, and updated policy manual was also posted at the SAR website. The problem was that I had not been notified of changes in the point of contact for that state. When there is a change in leadership, please notify me so I can update my email list. To find the posted emails, from the home page click on the Genealogy tab. You can see on that page what to click on next.

Jim Faulkinbury posts a new version of the Genealogy Policy Manual shortly after each Leadership Meeting. Policy modifications are in red. This time because the policies were reorganized and a number of standard practices were incorporated into policy, purple was also used to indicate that a practice was now policy. About a week after each leadership meeting, anyone can check the website to see if there are changes in policy. Updates to the Application Preparation Manual are also posted there, with updates in red. You can find these two documents from the home page three different ways:

- In the Membership drop down menu;
- Click on the Genealogy tab
- Drill down to the Genealogy Committee page from the Compatriots drop down menu and then the NSSAR Committee tab.

State registrars should pass significant information on to the chapter registrars, including how to find important genealogical information at the SAR website.

**Rhode Island Revolutionary Tax Lists, Volunteers Needed.** Larry Miller, who is both a DAR staff genealogist and an SAR state registrar, identified two Rhode Island tax lists as mandated by a state law passed at the request of the Continental Congress. Both are for South Kingstown, RI and published in Judith Green Watson's *South Kingstown, Rhode Island Tax Lists, 1730-1799*. One is the 28 August 1778 State Rate Bill, which says on list it was to raise £32,000 in accord with an act passed by the General Assembly in June 1778. *Records of the State of Rhode Island, Vol. 8*, states that the £7,500 was one fourth of a tax recommended by Congress. The second list is the 8 May 1782 State Rate Bill, which states at the end that the list was for a tax of £6,000 in silver or gold for supplying the Continental treasury. Both lists qualify as evidence for Patriotic Service. Green reports that the original lists are in the Office of the Town Clerk in Wakefield, RI.

The Subcommittee on Revolutionary Taxes has not found tax lists from the Revolutionary period in the Rhode Island State Archives from research on-line. Revolutionary tax lists for other Rhode Island jurisdictions may well be extant and held locally. Research in the counties is needed.

*The Records of the State of Rhode Island, Vols. 8 & 9* are often not very detailed about a Revolutionary tax law. For example, on 4 December 1777 the General Assembly voted to assess a tax of £48,000 and February 1779 voted to assess a tax of £60,000, but information about these lists is insufficient to determine whether they supported the War. Lists for both taxes have been published by Green. The latter tax was to be paid in certain bills of credit (paper money), suggesting that a purpose may have been to retire paper money. Congress urged the states to retire bills of credit because depreciation was threatening the financial underpinnings of the Revolution. Details from the statute, such as a provision to burn bills of credit received, may enable the Subcommittee to determine that another available list did support the War. If anyone

has access to the statutes, which are probably in the Rhode Island State Archives, copies would be of assistance to the Subcommittee and quite possibly open the door to proving new patriots.

**Tax Lists for Other States.** Subcommittee reports on tax lists that have been identified as providing evidence of service have been posted at the SAR website for the states of Pennsylvania, Maryland, and Virginia. In addition to these states, reports on the statutes of New York, New Jersey, Delaware, and North Carolina are also posted. From the home page, click on the Genealogy tab or drill down to the Genealogy Committee page from the Compatriots drop down menu. Then click on the NSSAR Committee tab. No reports are planned for Georgia or South Carolina based on information that no lists are extant for these states for the Revolutionary period. If anyone does find a Revolutionary tax list for either of these states, please let me know.

**Transition to the New Application System.** As reported previously, the trustees voted that use of the new application system effective 1 November 2015 is strongly encouraged and applicants using the new system will submit both a signed paper copy of the application and an electronic copy. Additional security features are presently being added to the system. In addition, documentation on how to use the system is being developed to reduce telephone consultation.

**Volunteers Needed for Spanish Service Subcommittee, Volunteers Still Needed.** In the last message to you I reported that the Genealogy Committee was looking for volunteers to conduct research to identify evidence that men provided cattle, served on cattle drives in support of Galvez, etc. To date, there have been no volunteers. We cannot accomplish this project without volunteers.

**Records of Virginia Revolutionary Service Microfilmed, and a Model for Outreach.** The Library of Virginia has microfilmed 21 volumes of Revolutionary War records with the aid of funding from the Virginia Society, DAR. These are records of the Auditor of Public Accounts, Receipts and Disbursements Journals, 1778-1797 (Accession APA 45) and are now available in the Archives Reading Room at the Library of Virginia as well as on interlibrary loan Misc. Reels 6251-6262. To quote from the announcement,

These volumes are comprised of daily entries of revenues and expenditures, many of which document payments for Revolutionary War service and public service contributions. Entries include payments for military service in the militia and Continental Line and for other military services rendered, relief payments to disabled soldiers and widows, interest paid on military certificates, and reimbursement for impressed property, as well as payments to individuals for civil services and to members of the General Assembly.

Records without an index or geographic organization at the county level are difficult to use, but just getting them on microfilm is a big step forward. DAR is also reaping publicity from the announcement, which you can read at:

[http://www.virginiamemory.com/blogs/out\\_of\\_the\\_box/2015/11/04/dar-sponsorship-to-preserve-records-of-revolutionary-war-payments/](http://www.virginiamemory.com/blogs/out_of_the_box/2015/11/04/dar-sponsorship-to-preserve-records-of-revolutionary-war-payments/)

I said at the Trustees Meeting in September that SAR needed to participate in more outreach programs with partners who are able to do the heavy lifting that we are not in a position to do ourselves. To be effective while economizing we need to leverage our abilities with the strengths of other organizations.

**Queue.** The genealogists are now processing new member applications received on 9 October and supplemental applications received on 24 August.

Regards  
John

## **Email # 14 to State Points of Contact from the Genealogist General 1 October 2015**

**Transition to the New Application System.** The trustees voted that use of the new application system effective 1 Nov. 2015 is strongly encouraged. At the Spring Leadership meeting the rollout will be assessed and a date for the mandatory use of the system will be considered. As of November 1<sup>st</sup>, applicants using the new system will submit both a signed paper copy of the application and an electronic copy. Documentation will continue to be submitted in paper only. No specific date for electronic submission of documentation has been discussed. Information will be forthcoming about how to use the new system and whom you should contact for help.

### **Policy Decisions by the Genealogy Committee.**

**Spanish Service** was amended to that militia service after the authorization of covert aid is acceptable without further proof of whether the unit performed an overt act that advanced American independence. The key sentence was changed as indicated in red:

Any member of the Spanish **Army, Navy, or militia** who served ~~in the Spanish Navy~~ in support of Galvez, in the Gulf of Mexico, from Texas to Florida, **along the Mississippi River, or were members of the Louisiana Infantry Regiment** between December 24, 1776 and November 26, 1783, may be considered to have performed qualifying military service in support of the Patriot cause.

The policy was also modified to clarify that the applicable geographic region is that within and not adjacent to the present day United States. I reminded staff that pended applications in their files should be reviewed in light of the new policy. Staff was already doing this, and some pended applications have now been approved.

**“Grandmothering” DAR applications rescinded.** When Policy 2009-02 was passed, there was a flurry of applicants taking advantage of this policy, but the number then dropped to a couple per year. After the Spring meeting, when the Committee decided to accept DAR applications approved after 1 January 1985, staff cannot recall approving any applications under this policy. Few will miss this policy.

**Consolidation of SAR Genealogy Policies Approved.** The previously approved policies, including policy decisions made earlier in the meeting, were incorporated in a consolidated genealogy policy. A number of practices that were not stated in policy were added to the policy. For example,

Published books that provide transcripts, abstracts, summaries or quotations of the above records, or information personally known to the author are admissible as evidence.

Several new policies were also added to fill holes. For example, a section has been added on appeals, providing a specific process for appeals to the President General and distinguishing that from a request that the Genealogist General review a decision by staff. Please take special note of this addition:

Only information for which a proof is given is to be stated on the application. Staff should not have to double-check for documentation of claims that the applicant believes, but for which no proof is submitted. In addition, an application can appear much stronger than it really is if unproven claims are entered. Seeing the number of blank spaces on an application can help applicants and registrars gauge how much has not been established.

**Recommendation of Bylaws Changes.** In Email # 13 I reported that I was proposing that the Genealogy Committee recommend three bylaws changes to the Bylaws Committee:

1. Eliminate the requirement that duplicate application forms be submitted. (Would you know what to do with a duplicate if you received one?)

2. The grandfathering bylaw is being clarified along the lines in accord with the interpretation I told you over a year ago that I was following.
3. Making the Genealogy Committee a standing Committee.

These recommendations will go forward.

**Proposed Family Plan Changes.** The Genealogy Committee will recommend that the requirement that those participating in a family plan not be required to be within two degrees of kinship. Degrees of kinship is ambiguous, as there are different, well-established, inconsistent ways of determining degrees of kinship, and for new member applications should be replaced by specific language similar to that in the Bylaw 1 authorizing the grandfathering of applications. For a supplemental application, a different criterion is appropriate. What is important is not how closely the members of the family group are related, but whether they have previously established their kinship with approved SAR applications. Each member of the family plan group should have an approved application with a common ancestor who descends from the patriot on whose Revolutionary service the group is applying. For example, if two men have already proven to SAR that they share a great great great grandparent, they have already established the first 5 generations for a for a supplemental on patriot ancestor. They should be able to submit family plan applications on a patriot great grandfather of their great great great grandfather.

**Volunteers Needed for Spanish Service Subcommittee.** Committee member Tom Green asked if anyone knew of records proving service by providing cattle or driving cattle to support Galvez. Nobody did. The Genealogy Committee has an opportunity to conduct research to identify such records and fulfill its mandate to serve as a resource on genealogical sources. If anyone is interested in serving on this subcommittee, or if you know of such sources but do not wish to serve, please notify Chairman Jim Faulkinbury at [jfaulkin@surewest.net](mailto:jfaulkin@surewest.net).

**Virginia Legislative Petitions.** Two different members had occasion to use Revolutionary petitions to the Virginia legislature recently, but did not know where to find them. It seems worthwhile to expand on information from Email #11, as this is a valuable source of service that you can access from your home computer.

The Library of Virginia has posted digital images of petitions to the legislature. You can find this at the Library's on-line catalogue by clicking on "Virginia Memory" in the "For the Public" section of the Home Page, then Digital Collections, and then using the alphabetic list of collection under "L," or go to:

<http://www.virginiamemory.com/collections/petitions>

You can select a county and then examine petitions chronologically. Kentucky counties are grouped together; West Virginia counties are organized separately. Earlier petitions to one of the Virginia Conventions are found among the papers of those conventions rather than in this collection.

SAR recognized Patriotic service by word, either in writing or by speaking. Section 2.3002 includes the provision recognizing Patriotic service of:

Petitioners recognizing the authority of revolutionary governments, Continental, provincial/state, or local. Petitions on any subject can be accepted. This includes, but is not limited to, petitions on military processes, locations of county boundaries, and the relationship between church and state. However, petitions of British sympathizers recognizing the power, but not the authority, of the revolutionary governments are excluded.

I have had difficulty in locating Revolutionary petitions for some other states, although I have used specific petitions for New Jersey and North Carolina to establish Patriotic Service of

ancestors. If you have information about how to locate Revolutionary petitions for other states, please let me know. I will pass this information along.

**Genealogy Seminar at Fall Leadership Meeting.** Felton Mitchell of the Alabama SAR spoke on the use of probate records in proving lineage. Felton is a retired CPA and attorney who worked extensively with probate issues during his professional career. The seminar was very well attended and informative.

**Patriot Indexes, Lineage Books, etc.** Recently a state point of contact asked a good question about the SAR Patriot index cds. Some of us still have these old cds. Family trees and family group sheets printed from these cds cannot be used for proof of lineage or service. The problem is that the cds reflect what is on applications, including applications that were not proven up to current genealogical standards, applications predating requirement to cite evidence of lineage, and even applications for which lineage or service was subsequently proven to be incorrect. They can provide clues and even point you to well-documented, verified applications, but are not acceptable themselves as evidence for proof of lineage. Other SAR and DAR indexes with the same limitation include the on-line SAR Patriot Search and the DAR ancestor search listings from their Genealogical Research System, the old paper DAR and SAR Patriot Index, and SAR and DAR Lineage Books.

**Verification Check Marks.** A check mark is placed at each fact of the application that is verified as proven. If a center-checked DAR record copy is submitted, check marks are placed to the left of the birth, death, and marriage data fields in each generation. If the DAR genealogist checked or corrected an individual datum or if the applicant submits documentation proving an individual datum, the SAR genealogist will also check that individual datum. An individual datum within a center-checked line will also be checked if the applicant proves that fact or the SAR genealogist has proof of the fact. Applicants are encouraged to prove what facts they can even if they can rely on a DAR or C.A.R. application, whether there are center checks or individual checks. Older SAR applications did not follow these conventions.

**Application Processing Queue.** New member applications are being reviewed by the staff genealogists about 4 weeks after they are received; supplemental applications are being reviewed after about 15 ½ weeks after they are received.

Regards,  
John

**Email # 13 to State Points of Contact from the Genealogist General  
8 September 2015**

**Genealogy Seminar for Fall Leadership Meeting.** A genealogy seminar is scheduled for 1:30 PM, September 25, 2015 in Citation Rm. B at the Brown Hotel. Felton Mitchell will speak on the use of probate records in proving lineage. Felton is a retired CPA and attorney who worked extensively with probate issues during his professional career. He is a member of the Alabama Society. Please check the meeting schedule in case there are any late changes.

**Suggested Bylaws Changes Concerning Genealogy.** I am suggesting to the Genealogy Committee that it recommend several changes in the Bylaws concerning genealogy to the Bylaws Committee. If the Genealogy Committee does so and further approvals and notifications take place, the changes would be voted on next summer at Congress in Boston. The proposed changes are:

1. Eliminate the requirement in Bylaw 1 Section 1 that applications be submitted in duplicate. Record copies of approved applications are now returned with membership certificates, making the requirement to two copies obsolete.

2. In Bylaw 1, Section 5, Paragraph 2 (grandfathering) replace the sentence

No additional proof may be required of the applicant provided the lineage and the ancestor's patriotic service is not in question and the patriot service is fully documented.

with

No additional proof shall be required of the applicant provided the lineage is not disproven by the SAR and the ancestor's Revolutionary service is proven in accord with current requirements.

This change addresses several problems. First, when the grandfathering provision was amended several years ago, the case was made that applications with demonstrably incorrect lineage should not be acceptable. The wording, however, says that grandfathering is not permitted merely if there is a question about the lineage, contradicting the intent stated in the Bylaw that a person can grandfather in "...even if one or more of present or former member's links back to the patriot ancestor are not documented sufficiently to satisfy current requirements." Second, "may be" introduces unintended latitude to demand additional documentation. Third, the requirement that service be "fully documented" is unclear and appears to be inconsistent with long established SAR practice recognizing that acceptable documentation of a single service for a single day is sufficient. Fourth, "Patriotic service" has long been used in SAR to refer Revolutionary service other than military and civil service, both of which are also acceptable as service. The broader term is accurate and eliminates ambiguity.

3. Add the Genealogy Committee to the list of standing committees in Bylaw 18. The Genealogy Committee is not only especially important to a lineage society like the SAR, but the Committee is mentioned in Bylaw 9, but not explained or established in the Bylaws.

**Application Processing Queue.** New member applications are currently being examined about 3 1/2 weeks after they were received and supplemental applications about 15 1/2 weeks after they were received.

Regards  
John

## Email # 12 to State Points of Contact

Thursday, July 9, 2015 12:24 PM

Good afternoon,

**Elections at Congress.** All candidates for uncontested offices, including the Genealogist General, were elected. I thank you for your support the past year and look forward to working with you this coming year. In contested races, the following candidates were elected: John Manning, Historian General; Michael Elston and Rick Hollis, Foundation Board (2 seats elected); Del Wood, Vice President General, New England District.

**Dues Increase.** Congress voted to increase dues from \$30 to \$35 for 2016. This is for regular members. The fee for Memorial applications will increase from \$380 to \$430 because under Bylaw 1, Section 6 (1) that amount is the application fee plus 10 times the dues. Junior member dues remain at \$5 and all other fees remain the same. *When submitting an application that will be received at National after 31 October, please be sure that the check includes the \$5 dues increase (or the \$50 increase for a Memorial application).* Staff informed me that the last time dues were increased there was a flood of applications from people trying to “beat the increase,” and I have already had a question from one state point of contact about this. While it makes sense to try to beat an increase in application fees, trying to beat a dues increase has little merit except for Memorial applications. If you beat the increase, the new member will be charged for both 2015 dues and (at the higher rate) 2016 dues. If the application with the check for dues and fees is received at National after 31 October 2015, the dues are applied to 2016 at the increased amount but no 2015 dues are charged. In short, beating the increase will cost the applicant an additional year of dues.

Especially with the dues increase, it is important to understand the Bylaws governing the submission of dues with new member applications. Usually dues accompanying applications are credited to the year in which the application is approved. Bylaw 21 (Fees and Dues), Section 6, paragraph 1 includes an important exception:

...National Society dues accompanying any application received after October 31 shall be credited to the following year.

If an application is received on 31 October and new member applications continue to be reviewed about 7 weeks after they are received at National, the application will be approved in late December. The dues remitted with the application will apply to 2015. The new member will be billed for 2016 dues. When I was a chapter registrar, I would inform applicants whose papers were expected to be ready in October that if their applications were held in the chapter so they would be received at National on 1 November or later, that they would save a year of dues. Some applicants were eager to take advantage of this. Others said that the dues were not significant, to proceed as quickly as possible.

**Genealogical Outreach.** I think all state registrars and genealogists are aware of how effective the DAR Genealogical Research System (GRS) is. This system

- makes available information about a patriot’s vital statistics and service helping internet users determine whether a particular patriot is an ancestor;
- names the child of the patriot through which the line goes for each application, making it easy to order a relevant application and documentation;
- indexes more recent descendants for many applications, making it easy to order a relevant application and documentation;

- identifies each application for which there is documentation on file.

It is great outreach to the public, attracts prospective members, aids chapter registrars and other members who assist applicants, provides important information to members pursuing supplementals, and makes staff more efficient because they can view approved applications and documentation from their desks. It is no accident that a tremendous number of our SAR applications rely on DAR applications and documentation rather than SAR applications and documentation. We have applications and documentation, but they are not very accessible as many of you remind me.

Many of our leaders are not genealogists and are unfamiliar with what DAR has achieved. They do not appreciate the benefits that a genealogical research system the way our state registrars and genealogists do. In addition we have heard so much about a museum the last few years that it is easy to forget that a museum is only one kind of outreach to the public. In addition to genealogical outreach and a museum, our youth and our community service programs provide outreach. We also have an opportunity to make Revolutionary records available to the public through the internet, another means of attracting and aiding prospective members. The Maryland SAR has shown the way by placing Maryland Revolutionary tax lists on its website. The National SAR can undertake this kind of outreach.

When I was called upon to report at Congress, I said that SAR needed to move forward with a genealogical research system, and made further remarks on the subject to the Executive Committee meeting held after Congress. There is increased awareness about a genealogical research system, but there is much to do. As Genealogist General it is natural that I say more about genealogical outreach than other kinds of outreach, but I do believe we need a balance. President General Brock said at the Congress that there would be discussion of scope of the Center for Advancing America's Heritage at the fall leadership meeting. The state registrars and genealogists can help by making other state leaders aware that a broader vision of outreach that includes genealogical outreach provides the opportunity for great benefits for the public, our members, and the organization.

**Spanish Service.** Some years ago the SAR accepted as proof of service any muster or pay roll proving Louisiana militia service under Spain dated between 24 December 1776 and 26 November 1783 inclusive. The former date was when covert aid to the United States was authorized by Spain. It was not the date that overt military action against England was authorized. In 2011 the Genealogy Committee received a number of complaints that the standard was too generous. A subcommittee was appointed to review the policy and recommend changes. Changes were adopted at the spring leadership meeting in 2012. No specific date limitations were imposed on service in the Spanish army or militia (other than 19 April 1775 through 26 November 1783, inclusive). Instead a requirement was added for the Spanish army and militia soldier that he served within the bounds of the present continental United States in a unit "...as shown by contemporary rosters..." that "provided military or material support...to the cause of American Independence..."(Policy 2011-03) If a roll is for one Galvez' gulf coast expeditions, SAR recognizes that the unit and men in it provided military support for the cause of American independence. However, there are numerous Louisiana militia rolls not associated with those expeditions for which there appears to be no information about the activity of the company. As a result, rolls that were previously sufficient to prove service no longer suffice by themselves.

Although the change in the policy has been posted in the Genealogy Policy Manual, staff and many members were unaware of it for the last three years. Staff members hired since 2012 were even trained in the old policy. I became aware of this problem several months ago and informed staff that they were obliged to adhere to the written, approved policy. A number of members,

especially from Louisiana and Texas, have expressed concern about the policy as it is presently written. I have kept the chairman of the Genealogy Committee informed about this issue. He is working with the members who crafted the current policy to see if they can develop a recommendation for the Genealogy Committee at the fall leadership meeting.

**Familiarity with Genealogy Policies.** Discovery that some current, written policies are not being followed has been a recurring problem during the last year. The Spanish service issue was the fourth where staff was not familiar with a policy. A Genealogist General is often not aware of the particular practices followed by staff when reviewing an application, and in all four cases it was to a largely by accident that I discovered a variance from written policy. I have recommended three measures to correct this problem which are being put into effect:

1. Staff should review the current policies, being alert for any inconsistencies between policy and current review practices. Inconsistencies are to be brought to the attention of the Genealogist General. Reviewing one policy at a time is recommended because almost any policy manual is not an easy read.
2. Staff should review new policies and amendments to existing policies after each Leadership Meeting, being alert for any inconsistencies between policy and current review practices. Inconsistencies are to be brought to the attention of the Genealogist General.
3. When an application falls under a relatively obscure policy that is seldom-used, the reviewing genealogist should reread that policy so it is fresh to mind.

When a policy is modified, the change is posted at the National website in red. This is easy to see, and happens only after the Spring and Fall Leadership Meetings. The Genealogy Committee does not meet at Congress.

**Staff Responsibilities for Pended Applications.** Responsibility for the review of a pended application remains with the staff genealogist who pended it. Some applications still in the system were pended by former genealogists Deborah Andrew and Susan Acree. Those pended by Deborah are now the responsibility of Patty Riemann, and those pended by Susan are now the responsibility of Martha Gammons. Martha has been reviewing the pended applications assigned to her. Upon further review and in some cases further work by Martha, eight previously pended applications have been approved. This effort is greatly appreciated.

Regards  
John

## **Email # 11 to State Points of Contact**

Friday, June 5, 2015 11:21 AM

Good morning.

**Genealogy Seminar at Congress.** Genealogist Denise Hall will speak on use of familysearch.org in preparing proof of lineage. The seminar is scheduled for 4:30-5:30 PM, Sunday, June 28th. It will be held in the Archibald Room at the Galt House. Please check the schedule upon arrival at Congress for any late changes.

**Changes in Points of Contact.** There appears to be an unusually high turnover in state points of contact and I am having trouble keeping up my address book up to date. If you are no longer a state secretary, state registrar, state assistant registrar, or state genealogist, please let me know and tell me who is taking your place and his email address. If you wish to continue receiving these emails, I will try to keep you in my address book for state points of contact. My internet service provider does limit the number of addressees for an email.

**Emails will be posted.** Don Shaw and I discussed posting my past emails to state points of contact. In the more recent emails I have used bold font to make it easy to pick out different subjects. Next week I plan to reformat the older emails and posting will follow that.

**Visit to Louisville.** I met with the Genealogy Department staff in Louisville on May 22<sup>nd</sup> and May 29<sup>th</sup> while on my annual Memorial Day trip. (Every year I travel to Illinois to place flags on the graves of relatives who served in our military and to conduct research along the journey.) In our group meeting, staff suggested that state points of contact forward my emails to chapter registrars. I know that many of you are already doing this, for I often receive email from chapter registrars within hours after sending an email to you. I reviewed several applications brought to me by staff in our one-on-one meetings.

**Virginia Legislative Petitions.** The Library of Virginia has posted digital images of petitions to the legislature. You can find this at the Library's on-line catalogue by clicking on "Virginia Memory" in the "For the Public" section of the Home Page, then Digital Collections, and then using the alphabetic list of collection under "L," or go to:

<http://www.virginiamemory.com/collections/petitions>

You can select a county and then examine petitions chronologically. Under Genealogy Policy 2011-03, patriotic service is recognized for "petitioners recognizing the authority of revolutionary governments, regardless of the level of government, Continental, provincial/state, or local." Petitions of British sympathizers recognizing the power but not the authority of the Revolutionary government do not qualify for service.

**Library of Virginia to Microfilm Additional Revolutionary Records.** The Library of Virginia will microfilm receipts and disbursement journals of the Virginia Auditor of Public Accounts, 1778-1797. The 21 volumes include entries of payments for military service, relief payments for disabled soldiers and widows, interest paid on military certificates, reimbursements for impressed property, and payments for civil service. The project is made possible by a \$4,029 grant from the Daughters of the American Revolution, which will receive a copy of the microfilm.

**Evidence for Pt. Pleasant Service.** In Email # 10 I identified 20 companies known to have been at the Battle of Point Pleasant. How is service in one of these companies to be proven? In some

rare cases, there is direct evidence. A man, especially an officer, may have been identified in an eye witness account as killed or wounded, or he may have petitioned Virginia for a stipend for having been wounded. A few applied for a federal pension, which was denied. I am now in the process of reviewing indirect evidence, and those of you who wish to contribute to the analysis are welcome to do so.

First, there are 8 muster rolls published by Thwaites and Kellogg in *Documentary History of Dunmore's War* for companies known to have been at the battle, all in Fleming's Boutetourt regiment. Three of these rolls were dated 10 September 1774, when regiment was at Camp Union prior to marching on to the Elk and then Point Pleasant. These rolls certainly provide strong evidence that the men on the rolls were at Point Pleasant one month later. Thwaites and Kellogg state that from the context, they judge the rolls of the other Botetourt companies also to be for 10 September as well. Their judgment on this matter is entitled to credit.

Second, a pay ledger at the Library of Virginia records the disbursements to 18 of the 20 companies, but dates of service are not provided for any. In the Library of Virginia on-line catalogue, click on Dunmore's War under the Images & Indexes tab or go to:

[http://va1.hosted.exlibrisgroup.com/F/RU9S7Y35CXDM8JH2YSF9UQ887HS3E9TYLAD8M94DVFHLDVDMCP-43624?func=file&file\\_name=find-b-clas36&local\\_base=CLAS36](http://va1.hosted.exlibrisgroup.com/F/RU9S7Y35CXDM8JH2YSF9UQ887HS3E9TYLAD8M94DVFHLDVDMCP-43624?func=file&file_name=find-b-clas36&local_base=CLAS36)

For several companies there are two or three payrolls, some for short tours of duty that were not of sufficient duration for men to march to Pt. Pleasant, complete their service, and return home. Most of the army marched in the middle or latter part of August and was marching home in November. I believe that pay for the long tours of duty for the 18 companies that were at the battle do indeed provide evidence that the soldier was at the battle.

Overall, documentation for the 20 companies known to be at the Battle of Point Pleasant, with page numbers referring to Thwaites and Kellogg, is:

- Botetourt Regiment (with additional companies assigned), Col. William Fleming
- Capt. Philip Love (10 Sept. 1774 roll, p. 407; ledger)<sup>1, 2, 3, 4</sup>
- Capt. Thomas Buford (undated roll, p. 409; ledger)<sup>1, 2, 3, 4</sup> (from Bedford County)
- Capt. Matthew Arbuckle (ledger)<sup>1, 2, 4</sup>
- Capt. John Lewis (10 Sept. 1774 roll, pp. 408-409; ledger)<sup>1, 2, 3, 4</sup>
- Capt. John Murray (10 Sept. 1774 roll, p. 406; ledger)<sup>1, 2, 3, 4</sup>
- Capt. John Stewart (undated roll, p. 410; ledger)<sup>1, 2, 4</sup>
- Capt. Robert McClanahan (undated roll, pp. 410-411; ledger)<sup>1, 2, 4</sup>
- Capt. Henry Pauling (undated roll, p. 411; ledger)<sup>1, 2, 4</sup>
- Capt. William Russell<sup>1, 2, 3, 4</sup> (ledger) (from Fincastle)
- Col. John Field<sup>1, 2, 4</sup> (from Culpeper; Field commanded the one Culpeper company)
- Capt. Evan Shelby (undated roll, p. 412; ledger)<sup>1, 2, 3, 4</sup> (from Fincastle)
- Capt. James Ward<sup>3, 4</sup> (Ward was killed in action. Only 9 men were in the company on a return dated 27 Sep. 1774, which probably explains why Ward's command is not listed as a company on the returns of 7 and 9 Oct.)

Augusta Regiment, Col. Charles Lewis

Capt. John Dickenson (ledger)<sup>3,4</sup>

Capt. Benjamin Harrison (ledger)<sup>3,4</sup>

Capt. John Skidmore (ledger)<sup>3,4</sup>

Capt. George Matthews (ledger)<sup>3,4</sup>

Capt. Samuel McDowell (ledger)<sup>3,4</sup>

Capt. Samuel Willson (ledger)<sup>3,4</sup>

Capt. Andrew Lockridge (ledger)<sup>4</sup>

Capt. Alexander McClanahan<sup>3</sup> (ledger)

Sources placing the company at the Battle of Point Pleasant (all in Thwaites and Kellogg):

<sup>1</sup> Return of 7 October 1774, Col. William Fleming's Regt.

<sup>2</sup> Return of 9 October 1774, Col. William Fleming's Regt.

<sup>3</sup> Col. Fleming's Orderly Book, entry for 10 Oct. 1774.

<sup>4</sup> Letter from Lt. Isaac Shelby to John Shelby, 16 Oct. 1774.

Poffenbarger presents her list in *The Battle of Point Pleasant* as "the names, yet preserved, of the men who participated in the Battle of Point Pleasant..." (p. 20). Muster rolls that had been published previously by Thwaites and Kellogg establish that many of the men listed by Poffenbarger were in companies guarding the frontier and not close to Point Pleasant. For example, men under Capt. Daniel Smith who are listed by Poffenbarger were in fact stationed at Elk Garden Fort, Glade Hollow Fort, Maiden Spring Station, and Upper Station (Thwaites and Kellogg, pp. 401-404). Furthermore, some on Poffenbarger's list were noted as "went away without leave" (George Dougherty, Michael Glaves, Isaiah Hambleton, among others). Capt. Robert Doack, whom Poffenbarger lists as a participant in the battle, was reported as deceased in a letter from Col. William Preston to Major Arthur Campbell dated 13 August 1774 (p. 145) and his company was guarding the frontier, not on the expedition to Point Pleasant. Poffenbarger's compilation is not of names of men who participated in the battle, but a broader list.

If an SAR or DAR application is cited for evidence of service and relies on this book, I have asked staff to request that the service (except for the well-known field officers) be validated against one of the eight rolls cited above or the pay ledger.

**Supplemental review time.** One of you recently asked the very good question of why supplementals are await review for about a month longer than new member applications. After all, the supplementals staff is half the size of the new member staff, but we receive only 40-45% as many supplemental applications. Supplementals have almost always waited longer for review than new member applications. There seem to be a several reasons for this. First, a number of chapter registrars tell prospective members to join on the easy line and work on the hard ones for supplementals. Not only have chapter registrars told me this, it was advice I gave when I was a chapter registrar. Second, the more difficult lines often use indirect evidence in proofs. This requires examination of more documents and the evaluation of a proof argument. Third, I strongly suspect that at the chapter level experienced members aid prospective members and those preparing supplementals do not receive comparable help. This affects the quality of supplementals. For 2014, 70 of the 3,796 applications new member applications received remain pending, while 84 of the 1,678 supplemental applications remain pending.

Regards,  
John

## **Email # 10 to State Points of Contact**

Saturday, May 16, 2015 5:54 PM

Good afternoon.

We have a number of new state and chapter registrars. During the last month I have received queries about some subjects I have previously discussed, although sometimes from a slightly different angle. I will discuss some of those older subjects. If you see that my email list is out of date, please let me know.

**New Part-time Genealogist.** Martha Gammons, who has been a utility staff member at headquarters working in various departments as needed, has joined the Genealogy Department. On my first visit to Louisville as Genealogist General last summer Martha told me that she was personally interested in genealogy. Martha first became interested in genealogy in the 1970s and is a member of several genealogical and historical societies. Patty Riemann provided training for Martha and checked the applications that she examined each day for two weeks. Last week Martha told me how much she enjoys working in the Genealogy Department. I am quite pleased that we have an able and enthusiastic new member of the Genealogy Department. Martha is a part-time employee, so she may well not be at work on a day when you might email or call.

**Updating Your SAR Applications.** Earlier this month I was at an SAR dinner with a compatriot who became a member when SAR was still located in Washington, DC. The gentleman is a good genealogist who carefully documented his application. That documentation was never sent to Louisville. He wants it on file with his original application. The solution is to submit copies of the documentation as an update. A procedure for requesting updates and corrections to applications is in operation. Submit the documentation with a cover letter identifying the patriot and if applicable, the particular application. There is no fee for this service, although one may be considered in the future if too much staff time is expended. It is not the fault of applicants that documentation was not moved to Louisville, and it is not the fault of applicants that genealogical standards may have changed since a member applied or submitted a supplemental. In addition, we do want errors corrected and new information to be provided.

**Pre-1985 DAR and C.A.R. Applications.** Questions have arisen regarding DAR and C.A.R. applications approved before January 1, 1985. Policy 2011-06 states that such applications "shall be accepted as evidence with respect to the corresponding facts that have been marked as individually verified on the DAR or C.A.R. applications." At various times the DAR and C.A.R. have used a single check mark to indicate acceptance of a date, rather than one check for day, one for month, and one for year. Similarly, one check was used for the names of an ancestor and one check for the town, county, and state. Some of my own older record copies show that SAR has also followed this practice in the past. This use of checkmarks meets the requirement of individual verification. We certainly prefer that the documentation proving those facts be submitted so they will be part of our SAR records.

**DAR and C.A.R. Supplemental Applications.** When you are submitting a DAR or C.A.R. supplemental application, please highlight that the record copy, especially if the member originally joined before 1985. Recently a staff member saw a "low" member number on a DAR record copy and did not realize that the application was a supplemental approved after January 1, 1985. This is an easy mistake to make.

As a reminder:

- The first DAR application approved in 1985 was #688702.
- The first DAR add volume beginning in 1985 is 622. There are some supplementals approved in 1985 in add volume 621.
- The first C.A.R. application approved in 1985 was #130021.
- A C.A.R. supplemental application approved in November 1985 was in their add volume 9. Whether applications approved in 1984 are also in the add volume is not known.

**Documentation that Does Not Meet SAR Standards.** It is always frustrating to review documentation and discover that it cannot be used in a proof because it does not meet SAR standards. I have instructed staff that if a source does not meet SAR standards, it is not to be used to pend an application as well. Let me give you two examples.

Suppose that an applicant provides a marriage record showing that John Doe married Rachel Roe, but that an undocumented book says that John Doe married Jane Joe. That book is not to be used to pend the application because there are identity problems. However, identity problems can be raised from acceptable documentation, such as census records that establish there were two men of the same name living in the same vicinity. If you are aware of an identity issue, please resolve this issue with the application. You may have documentation to settle the question once and for all, whereas if the question arises decades from now the key documents may not be accessible. I can think of three of my own supplementals for which I provided documentation to distinguish first cousins of the same name.

A case concerning service arose recently. The applicant submitted evidence that an ancestor was in military service at a particular battle. The service denied because the ancestor's name was not in a well-known book that included the names listed on a monument at the battlefield and years ago staff was told that book was definitive. The book cites no sources for the men listed and simply does not meet current SAR standards. The book cannot be used either to prove service because a name is listed or to pend an application because a name is missing.

**Proof of Service at the Battle of Pt. Pleasant.** You may now be curious about the book found not to meet current SAR standards. It is *The Battle of Point Pleasant* by Livia Simpson-Poffenbarger. I reviewed the names in the book. This is not just a case of a book falling short of current documentation standards. Names of many men in units not at the Battle of Point Pleasant were included in her list, and many men in units that were engaged in the Battle were not listed. Policy 2011-05 requires that a soldier have been at the Battle to qualify for Revolutionary service and not merely a participant in other aspects of Dunmore's War. Poffenbarger's book has long been accepted by SAR as evidence that a soldier was at the battle, although that may well not have been her criterion for the list. Applicants to prove that a soldier was at this battle using acceptable evidence.

I have commenced review of documents that place various units at the battle. However, my findings should not be considered final. Four sources place 20 companies at the battle on 10 October 1774:

1. Return of 7 October 1774, Col. William Fleming's Regt.
2. Return of 9 October 1774, Col. William Fleming's Regt.
3. Col. Fleming's Orderly Book, entry for 10 Oct. 1774.
4. Letter from Lt. Isaac Shelby to John Shelby, 16 Oct. 1774.

These units are:

Botetourt Regiment (with additional companies assigned), Col. William Fleming

Capt. Philip Love<sup>1, 2, 3, 4</sup>

Capt. Thomas Buford<sup>1, 2, 3, 4</sup> (from Bedford County)

Capt. Matthew Arbuckle<sup>1, 2, 4</sup>

Capt. John Lewis<sup>1, 2, 3, 4</sup>

Capt. John Murray<sup>1, 2, 3, 4</sup>

Capt. John Stewart<sup>1, 2, 4</sup>

Capt. Robt. McClanahan<sup>1, 2, 4</sup>

Capt. Henry Pauling<sup>1, 2, 4</sup>

Capt. William Russell<sup>1, 2, 3, 4</sup> (from Fincastle)

Col. John Field<sup>1, 2, 4</sup> (from Culpeper; Field commanded the one Culpeper company)

Evan Shelby<sup>1, 2, 3, 4</sup> (from Fincastle)

Capt. James Ward<sup>3, 4</sup> (Ward was killed in action. Only 9 men were in the company on a return dated 27 Sep. 1774, which probably explains why Ward's command is not listed as a company on the returns of 7 and 9 Oct.)

Augusta Regiment, Col. Charles Lewis

Capt. John Dickinson<sup>3, 4</sup>

Capt. Benjamin Harrison<sup>3, 4</sup>

Capt. John Skidmore<sup>3, 4</sup>

Capt. George Matthews<sup>3, 4</sup>

Capt. Samuel McDowell<sup>3, 4</sup>

Capt. Samuel Willson<sup>3, 4</sup>

Capt. Andrew Lockridge<sup>4</sup>

Capt. Alexander McClanahan<sup>3</sup>

This list includes the companies of Capt. Alexander McClanahan, who was ordered to guard the camp, and Capt. John Lewis, who was ordered to form a line around the camp. Col. Fleming wrote that the Augusta Regiment came under fire about 150 to 200 yards from the camp. Wounded men returned to the camp during the battle. The list does not include troops under Col. William Christian who arrived at Pt. Pleasant about midnight after that battle was over. The list also does not include companies on returns after the battle, even though they may show wounded men. The number of men in some companies roughly doubled, indicating that wounded from other companies were reassigned from companies that marched on from Pt. Pleasant.

The companies of Capt. Joseph Hains/Haynes and Capt. William Herbert are said to have been at the battle, but other than 6 unnamed men from Herbert's company included in the total of Shelby's company I have not found acceptable documentation establishing this.

**Revolutionary Tax Reports.** Recently I received a query about whether a particular tax supported the War and its lists are evidence of Patriot Service. The reports of the Subcommittee of Revolutionary Taxes are posted on our SAR website at:

<http://www.sar.org/Committees/Genealogy/Tax-lists>

For the states where we have reports on specific lists that qualify, there are detailed instructions about what pages to provide and how to site them. Many lists are widely available for three states: Maryland, Pennsylvania, and Virginia.

The Maryland SAR has posted images of the lists that provide evidence of patriotic service in the Membership section of their website, and the Maryland State Archives has posted an index of the 1783 Supply Tax.

<http://www.mdssar.org/membership/marylandtaxlists>

<http://msa.maryland.gov/msa/stagser/s1400/s1437/html/ssi1437e.html>

The index, which can be found with a search on “1783 Maryland Assessments,” is not sufficient to prove service because paupers who paid not tax and delinquents are indexed. The Maryland SAR has provided an outstanding service by posting these lists.

Some Pennsylvania tax lists that provide evidence of Patriotic Service were published in the *Pennsylvania Archives* over a century ago. Even more are available on microfilm of *Tax and Exoneration Lists, 1762-1794* that is available at some genealogy libraries. Some but not all of those lists are available at ancestry.com. Applicants should be aware that the published *Pennsylvania Archives* changed the names of lists, for example, adding words like “Ratable” and dropping words like “Supply Tax.” Ancestry.com has dropped a number of title pages. To identify a tax list, applicants should use an inventory of tax lists published posted by the Pennsylvania State Archives at:

<http://www.phmc.state.pa.us/bah/dam/rg/ys/r4ys2.htm#4.61>

*The URL has changed since the Subcommittee on Revolutionary Taxes published its report.*

Some counties hold additional lists not in the state archives.

The most extensive and complete Virginia lists that provide evidence of Patriotic Service are the 1782 and 1783 personal property and land tax lists. Images of about 2/3 of these lists are commercially available at binnsgenealogy.com.

Regards,  
John

## **Email # 9 to State Points of Contact**

Saturday, March 21, 2015 9:49 PM

Good evening.

**Application Status Report Delay.** I have received a number of reports/complaints that the Application Status Report has not been updated since March 12<sup>th</sup>, almost a week and a half ago. I know that Jessie Hagan was out sick on Thursday, and may well have been on Friday as well. He normally updates the report. I have long felt that SAR has not cross-trained staff so that a routine task that affects the members can be carried out in a timely fashion when someone is out, whether due to sickness or vacation. I have asked Don Shaw what can be done about this.

### **1985 DAR and SAR Application Numbers.**

- The first DAR application approved in 1985 was #688702.
- The first DAR add vol beginning in 1985 is 622. There are some supplementals approved in 1985 in add vol 621.
- The first C.A.R. application approved in 1985 was #130021.

Thanks go to Larry Miller and Paul Hays of the District of Columbia SAR for tracking down this information.

**Report of the Branding Committee.** President General Brock appointed a committee to study branding. The Committee submitted a detailed report for the Spring Leadership Meeting with suggestions about how we can improve recognition for the organization and what it stands for. One suggestion is that we simplify how we refer to our state-level organizations—District of Columbia SAR rather than DC Society SAR. Another implicit suggestion that resonates strongly with me is to pronounce SAR as three separate alphabetic letters, instead SARS (Severe Acute Respiratory Syndrome) without the trailing S. I have heard people ask about whether we are connected with the disease. I would much rather have them react, “Like DAR but for men?”

The report is Item 1 under Important Items at the SAR home page. Please take a look at it.

**Expedited Applications.** We have had several unfortunate incidents involving applications approved for expedited processing before they arrived at headquarters. Upon arrival they were not recognized as expedited applications. As a result, processing was delayed. We are working to ensure that the staff is alert to recognize expedited applications when they arrive, but you can help. When you submit an application that has already been approved for expedited processing, please indicate this on the transmittal sheet. On a related matter, a recent expedited application was signed by the person who has power of attorney for the applicant. There was nothing in the material submitted to indicate that the applicant had granted a power of attorney, and I did not know this even though I had been given enough information to approve that the application be expedited. A day was lost in approval process. When something unusual like this is occurring, please provide a brief explanation.

Regards  
John

## Email # 8 to State Points of Contact

Thursday, March 12, 2015 11:32 AM

Good morning.

There is plenty of news from the Leadership Meetings.

**Genealogy Committee Policy Changes.** The Genealogy Committee approved 5 policy changes last Friday. **For exact wording of the policies, please see the Genealogy Policy Manual at the website. You can use the dropdown menu from the Membership tab on the home page.** An updated version, along with the Application Preparation Manual, will be posted late this week or early next.

- a. **2011-06, Applications from other lineage organizations.** SAR will now accept an official record or chapter copy of a DAR or C.A.R. application approved after 1 January 1985 as evidence of lineage and related fact except where DAR, C.A.R. or SAR has determined that the facts have been determined to be incorrect. In other words, **center checks on applications approved after 1 January 1985 no longer prevent a DAR application from being accepted in lieu of other documents.** Applications approved before this date are acceptable for corresponding facts marked as individually-verified on DAR and C.A.R. applications. The subcommittee acknowledged that there were arguments on both sides of the issue and what it proposed was a middle ground that it deemed in the overall interest of the organization. No review process is perfect, but the overall DAR review process is an excellent one that includes a number of checks and balances. The old policy was clearly confusing to many applicants, chapter registrars, and state registrars, and the genealogy staff was spending a great deal of time requesting further information relating to DAR applications. Compatriot Peterman made a point in discussion I think all of us share: **we do prefer copies of the documents themselves.**
- b. **2005-03, Application completeness. The applicant's certificate of birth stating the names of parents, date, and place of birth of the applicant, if available, is no longer required.** Other evidence for this information is now acceptable. Basically evidence that is acceptable for all other generations is acceptable for the applicant's generation. A birth certificate with the information above conveniently proves multiple points on the application.
- c. **2012-04, Proof documents in foreign languages.** Policy 2012-04 still requires that a document in a foreign language be submitted with an accurate English translation of the pertinent facts. **If a foreign language document is in an archaic handwriting with the text not easily recognizable, a transcription of the pertinent portion of the document is also required. It is no longer necessary to provide attestation that the translation is adequate by a competent translator.** The latter was overkill for simple translations of birth and death registers, and essentially impossible to achieve for translations of documents for which the originals are not readily accessible.
- d. **2011-01, Direct and Indirect Proof Sources for Providing Revolutionary War Service of a Patriot Ancestor. Letters and newspapers and broadsides created between 1775 and 1783 have been added as examples of documents that can be accepted as evidence of service.** These have already been acceptable, but all of the examples in the policy previously were official records.
- e. **2011-03, Acceptable Revolutionary Services. Renouncing allegiance to the King of England is no longer sufficient for Patriotic Service.** Oaths of allegiance also had another part that is critical: swearing allegiance to a state or the Congress. Clearly, if allegiance was

sworn to another king and not to a state or the Congress, the renunciation of allegiance of the King of England would not be Patriotic Service in furthering the Revolution.

**New Subcommittees.** The Genealogy Committee established two subcommittees. One is to consolidate related rules that are scattered among our various policies. The other is to consider whether the Genealogy Committee should make recommendations to the Bylaws Committee concerning grandfathering in the light of the newly amended policy concerning DAR applications.

**Application System.** A new application preparation system is currently undergoing beta testing. The system is designed to produce applications that have the same appearance as our current applications. The next version will be designed to have dynamic space allocation. For example, only the number of generations needed will be printed and extra space will be allocated to where it is needed, such as references section for a particular generation that requires many citations.

**Florida Application Proposal.** The Florida Society submitted a revised application for consideration, but wishes to see how the new application system under development shapes up before there is further discussion. Word has circulated and I have received several emails expressing concern about the expansion to four pages. Much of the added space is for additional generations. There have been several reports of applicants who need all 12 generations on our current form and it is just a matter of time until we start receiving applications with 13 or more generations. As reported above, the second release of the new system will not allocate space for unneeded generations. There is no cause to panic about the Florida proposal just because you have heard that it is four pages, like the DAR application.

**Mitigating a risk to our genealogy records.** I learned that the fire suppression system is water based, which is an obvious risk for our genealogy records. This has been reported to the Executive Committee and the Project Manager for the building completion. The contract has been asked to look into the cost of an alternative system for our records room. We also need to look at scanning all of the genealogy records, which is needed for a genealogical research system that would benefit our members and provide outreach to the public.

**Genealogy Workshop.** About 25 people attended the genealogy workshop Friday afternoon. The subject was "Use of Revolutionary Taxes as Evidence of Patriotic Service." The workshop had two goals: to provide an understanding of policy and why certain tax records provide evidence of Patriotic Service, and to demonstrate how to go about proving service based on Revolutionary tax records.

**Conversation with President General Downing.** President General Roland Downing spoke at the banquet Saturday night, emphasizing the importance of genealogy in the SAR mission. I spoke with him after the banquet. He commented that he would like to see some way for us to engage people interested in genealogy as they left the museum. I responded that a genealogical research system, similar to the one DAR has developed, would accomplish that goal and that such a system should be part of our vision for outreach programs of the Center.

**Ancestry.Com data bases.** It is widely understood that undocumented family trees posted at Ancestry.Com are not accepted by SAR as proof of lineage or service, although with some regularity these are still submitted. It is not as well understood that some of the data bases available through Ancestry.Com are also based at least in part on unverified, user-supplied information. SAR does not accept "Family Data Collection" (births, deaths, marriages); U.S. &

International Marriage Records; Millenium Files; or AGBI (American Genealogical Biographical Index). There may be others, but these are among those most often submitted.

Regards,  
John

## **Email # 7 to State Points of Contact**

Thursday, February 12, 2015 12:42 PM

Good afternoon.

I had planned to prepare Email #7 after the Leadership Meetings next month, but in the last week there have been a couple of significant developments to report to you.

**New DAR Practice and Policy on Documentation and Record Copies.** President General Lynn Young announced a new policy and practice in her blog of 6 February 2015: <http://youngblog.dar.org/blog> DAR still sells record copies of applications for \$10, but will now sell the supporting documentation for an application for \$20. Both can be purchased for \$30. She states, "...any vital records or applications that contain personal information (birth, death, marriage, divorce or other sensitive documentation) will not be included with the Supporting Documents unless they are over 100 years old." I went to DAR yesterday to explore the implementation of this policy with my mother's documentation. I was quite familiar with what was submitted, as I assembled it.

- Six vital records less than 100 years old were indeed absent from the file I could see on the computer in the Seimes room: one marriage certificate (1921) and one birth certificate (1922), and four death certificates (1934-1985). This was expected.
- My grandmother's birth certificate was in the file. She was born in 1897, but it was a delayed birth certificate was filed in 1940. I was not sure what to expect, but was pleased to see it available.
- Although the dates, places, and names from the vital records are on page 2 of the DAR application, this page was visible without redaction on the computer. I was told by the librarian on duty that page 2 would be printed for a record copy just as it appears. This is consistent with a recent record copy ordered by our Genealogy Committee Chairman, Jim Faulkinbury.
- I was able to see a marriage certificate over 100 years old for my great grandparents, who died in 1934. This was what I expected, but wanted to make sure it was not redacted because they died less than 100 years ago.
- I was able to see my grandfather's World War I Enrollment and Discharge (1921), which had been used to prove his date and place of birth. I was not sure whether this might be deemed sensitive information and was pleased that it was available in the file.

The proof of lineage and vital statistics from vital records under 100 years old will not be available in the DAR documentation for an application, but the information is likely to be available in the application itself if proven from vital records. Of course, we would prefer that you order and provide copies of birth, death, and marriage records rather than rely on a DAR record copy.

Also please note that DAR Data Cover Sheets sometimes provide a "Date Verified." This is only the date that the cover sheet was prepared, and does not represent a second verification of the application with which the documentation was submitted.

**Departure from Office of Registrar.** Aaron Adams, our long-time staff registrar, has left SAR and is moving to Virginia. Jonathan Toon is replacing him. At the present time there is a slight delay in the registration of applications due to the transition and the Office of the Registrar is also preparing the annual reports at this time. This has no effect on the processing of applications by the Genealogy staff.

**Virginia Tax Lists Made Available to SAR Library.** The Subcommittee on Revolutionary Taxes, NSSAR Genealogy Committee, has made twelve Virginia Tax/Procurement Lists available to the SAR Library. These are:

Amherst County, 1780 Specific Tax Lists

Augusta County, 1779 List of Procurement Vouchers

Berkeley County, 1781 Specific Tax

Botetourt County, 1780 & 1781 Specific Taxes

Brunswick County, 1782 Specific Taxes

Buckingham County, Cattle Collected

Caroline County, 1780 & 1781 Specific Taxes and Procurements

Chesterfield County, 1780 & 1782 Specific Taxes

Culpeper County, 1782 Specific Tax

Goochland County, 1781 Specific Tax

Henrico County, 1783 Bounty Tax Errors

James City County, 1782 Specific Tax

Under preparation now for release is Isle of Wight County, 1778 Tax for Public Exigencies. The SAR Library is currently upgrading its computers and the lists will be loaded once that is completed.

All of these lists provide evidence of Revolutionary service for those named, except for the insolvents on one or two lists. Whether grain or another “specific” was purchased or remitted to pay taxes, it generally was stored by a county commissary. The commissaries intermingled records of tax payments and procurements. These are now in the same boxes and folders in Record Group 48 (Auditor of Public Accounts) Subgroup 640 at the Library of Virginia. We found that some of the patriots named on procurement records were not included in the Virginia Public Claims records, so the Subcommittee made these records available along with the tax lists. For more information on the lists and the nature of specific taxes, click on the reports on Virginia Tax Laws and Virginia Tax Records at:

<https://www.sar.org/Committees/Genealogy/Tax-lists>

If you forget the URL, at the NSSAR web site click on Compatriots, NSSAR Committees, Genealogy, Reports: Subcommittee on Revolutionary Taxes, and the Virginia law and tax records.

Please be aware that the lists now being prepared seldom cover an entire county.

**Supplies and Services Provided in Virginia.** The volumes of Abercrombie and Slatten’s *Virginia Revolutionary “Publick” Claims* are widely used for evidence that a Virginian provided supplies or services in support of the Revolution. These books draw their information from court booklets and lists at the Library of Virginia. These records do not always list names of those who provided supplies and services that are available elsewhere. The court booklets, recorded in sessions generally held between 1781 and 1783, were a middle step in the process of recording goods and services provided under an act passed in 1780. The first step was to issue a certificate to the patriot. The third step was to submit a claim to the Congress. These were recorded in the Commissioners Books. Certificates and Commissioners books are also in the Library of Virginia and sometimes provide names omitted from the court booklets and lists. The Library of Virginia provides an index of all three sources. Go to

[http://lva1.hosted.exlibrisgroup.com/F/IVJFUHBR2U8YADSFCA4YQHTFAJ8K3SC5HHQFDJQ3IS1QK9XEGH-07430?func=file&file\\_name=find-m-lva01](http://lva1.hosted.exlibrisgroup.com/F/IVJFUHBR2U8YADSFCA4YQHTFAJ8K3SC5HHQFDJQ3IS1QK9XEGH-07430?func=file&file_name=find-m-lva01)

and select the data base Revolutionary War Public Service Claims. Search using last name first. Alternatively, go to their website, <http://www.lva.virginia.gov/>, click on the catalog, then the tab for Images and Indexes. You can now select the database for Revolutionary War Public Service

Claims. There are other data bases of interest for proving service as well at the Images and Indexes tab.

As noted above, there are also procurement lists intermingled with specific tax lists that name men not in this data base. These are paper documents in Record Group 48 (Auditor of Public Accounts), Subgroup 640.

Records for providing services or supplies prior to the act passed in 1780 can be a challenge. *The Journals of the Council of the State of Virginia, Vols. 1-3*, list many who provided goods and services throughout the War. Volume 1 begins with the Journals of the Committee of Safety of Virginia. Both the records of the Committee of Safety and the Council of the State of Virginia also provide information about military and civil service.

Does anyone know where to find comparable Pennsylvania records?

**Sad announcement.** Robert “Bobby” Towns, our Historian General, died on February 10<sup>th</sup> at age 76. Bobby had been suffering from cancer. He will be missed.

Regards  
John

## **Email # 6 to State Points of Contact**

Wednesday, January 21, 2015 7:52 PM

**Personal Knowledge in SAR, DAR, and C.A.R. Applications.** Earlier this month I made my fourth trip to Louisville since Congress. I met with the entire Genealogy staff for several hours, and then met with individual staff members about particular applications of concern to them. I am pleased to report that the staff have been taking advantage of the amendment to policy that allows staff to consider in evidence the personal knowledge from SAR, DAR, or C.A.R. application that is over 20 years old. Earlier this month a 1902 DAR application in which a lady named her father and grandfather was used to establish the link between a man who died in 1847 and his son for an SAR application.

**Genealogy Seminar at Leadership Meeting.** A genealogy seminar is being scheduled for the Leadership Meetings in March. The subject will be Revolutionary Tax lists. Use of qualifying tax lists for service has taken hold. As more members are becoming aware of the opportunities, more are having questions.

**Getting applicants excited.** Recently I was doing research on the service of a patriot to help the father of one of our staff members in Louisville. I had found several proofs of service from books and journals in the DAR Library. After discovering the patriot was a lieutenant, I did a name search at Fold3 to see if any pension applicants mentioned him. One did, providing information that the company marched from Virginia to the town of Ninety Six in South Carolina. I have found that applicants are enthusiastic when you provide them such documents. Just seeing the image of an old, handwritten document bearing the name of a Revolutionary ancestor is a thrill for many. Having a brief account of what the ancestor did when on active duty can take the excitement to another level. Knowing in what campaign the ancestor served can lead the gentleman to other accounts of what happened in that campaign. Finding copies of original documents is a bit more work for our chapter registrars, but doing so can really engage our new members. The applicant also sees that the chapter is really interested in him and his ancestor.

**Replacement patriot ancestors.** Problems recently surfaced in a couple of states where applications would not be sent to National without certainty at the state level that an application would be accepted by National. The rationale in one case was that it is unfair to risk an applicant's fee if the evidence is not good enough. We certainly do not want state registrars sending applications to National that they know will be pended, but requiring certainty is also causes problems, including morale problems among our applicants and tension between state and chapter registrars. Please keep in mind that a different patriot can be substituted if the line or service turns out to be unprovable. There is a limit of one replacement for supplemental applications, but at present no limit on the number of replacements for new member applications. A suggestion has been made that a limit of two replacements without a further application fee be established for new member applications, but at this is just a suggestion and not policy at this time.

**Tombstones for dates of death.** Legible photographs of tombstones that were erected close to the date of death of an ancestor provide valuable evidence for dates of death of ancestors. You must, however, provide the location of the tombstone—name of cemetery, county, and state. For my own supplementals, I also provide the geographic co-ordinates from the hand-held GPS unit I keep in my

cemetery kit. More than once that has proven useful years later in finding a grave again. Published abstracts are often acceptable, but we are seeing an increasing number of compilers adding further claims that they “know” to be true, but is not inscribed on the tombstone. This additional information typically is without citation and is not acceptable as evidence. For the same reason, the text from Findagrave.Com memorials is not acceptable as evidence unless there is citation of an acceptable source. Citation of the SAR Patriot Graves does not meet SAR standards for proof of dates, places, and services. Grave registrations have not been reviewed by staff for adequacy of the evidence, including whether the person buried in the grave really is the same person who served even when we have proof of service.

**Proof of service must meet a higher standard than proof of lineage.** Policy 2011-01 states in part,

Unsupported statements in prior applications, town and county histories which are not contemporary, biographical dictionaries, family histories, and genealogies may not be accepted as proof of service. Information found in these sources that can be attributed to credible witnesses who were living at the time may be considered.

This means that the account of a child born after the Revolution is not acceptable as evidence for service of the parent. However, a child’s personal knowledge of the identity his or her parents and grandparents is acceptable as evidence when provided sources such as local and family histories or a SAR, DAR, or C.A.R. application over 20 years old, or a family Bible. People often had personal knowledge of the identity of their grandparents, even though they were certainly not eyewitnesses to the birth of the parent. This more generous standard does not, however, enable an applicant himself to omit documentation for his parents and grandparents in lieu of his own personal knowledge.

There has been a significant change in policy since the days of the old Form 912 that favors the applicant in proving service. Proof of service is no longer limited to official records. For example, newspapers and private correspondence from the time of the Revolution may also be introduced as evidence. I have suggested that the Genealogy Committee add these as examples to documents that can be accepted as evidence of service to Policy 2011-01.

Please note that accepting something as evidence is not the same thing as deciding in that the evidence is sufficient as proof.

**Updates for older applications.** Earlier this year we established a corrections program. So far, relatively few members are taking advantage of this. If a member has discovered new information about an ancestor on one of his approved applications, he can submit the documentation and have his record copy updated. This is especially important for those whose applications no longer meet current requirements.

**Do you have ideas?** About a half a dozen states are continuing to submit a large number of undocumented Ancestry.Com family trees, etc. This really slows down the staff, as they must prepare an email, often explain the email after it is passed from the state to the chapter level, and then pick up the application cold when additional documentation is submitted. A suggestion has been made that we offer training for state and chapter registrars. We are having genealogy seminars at the Leadership Meetings, but only a small fraction of our state and chapter registrars travel to Louisville to attend the meetings. It is not feasible for me to travel to any state that wants training. Do any of you have thoughts on how we can train registrars across the nation? In terms of content, we have not developed a training agenda, but the Application Preparation Manual offers us a road map.

**Processing Time.** The length of time between an application being received at National and review is now up to about 6 weeks for new member applications and 11 weeks for supplemental applications. The length of time usually grows at this time of year due to a seasonal influx of applications, holidays and staff vacations, and then drops in the first quarter of the new year. I will be keeping a close eye on this.

I hope to see many of you at the Leadership Meetings in March.

Regards  
John

## **Email # 5 to State Points of Contact**

Friday, November 14, 2014 9:04 AM

Gentlemen:

I made my third trip to Louisville since Congress on October 29<sup>th</sup> and 30<sup>th</sup>. I met with the genealogy staff as a whole for about two hours. I also met with each staff member individually to review applications about which each he or she was concerned. The meetings were productive and I am seeing staff make a real effort to prove lineage and service without sending a request to you for more information.

**Processing Time in Louisville.** All of us are interested in the length of time an application awaits review after being received at National. On November 13<sup>th</sup>, staff was reviewing new member applications received on October 20<sup>th</sup>, about 3 ½ weeks. Many new member applications were held so new members would not be billed for 2015 dues right after paying their application fee and 2014 dues. We saw a surge of new member applications in October, 421 as opposed to 198 received in September. On November 13<sup>th</sup>, staff was reviewing supplemental applications received on August 28<sup>th</sup>, eleven weeks. This represents a one week improvement from a month ago. We fell behind prior to Congress because many members submitted supplementals ahead of the expected fee increase. Some of those were of weaker quality than normally received, which further increases the review time. When word of a likely fee increase spreads, it is inevitable that there will be a surge in applications as people trying to beat the increase.

**What you and chapter registrars can do to improve processing time.** State and chapter registrars can speed the review process at National with a solid review of applications and supporting documentation. National continues to receive:

- DAR records copies that do not meet SAR standards

- Family group sheets and trees (including trees posted at Ancestry.Com)

- Undocumented family histories

- Find-a-Grave listings not supported by a tombstone photograph and/or source citation Dates of birth and death posted at Find-a-Grave do not meet SAR standards without a photograph, and undocumented claims about relationships that are often posted there also do not meet SAR standards.

- Illegible documents

- Citation of a previously approved SAR application without specifying the patriot

  - You should say something like “SAR #000,000, Application on John Doe” rather than “SAR #000,000.” If SAR member #000,000 has supplementals, it takes staff time to figure out which application or applications are the relevant ones.)

About a half a dozen states are submitting a disproportionate number of applications that fall short of standards. I think there are two reasons for this. One is the desire not to be the bad guy and let the genealogists in Louisville be the bad guys. Another is the desire to keep the state queue of un-reviewed applications short and really work only those pended by National. Folks, this is slowing down the review at National. It affects all other states, and the extra time of the genealogists in Louisville costs all of us money. Increasing review time at National also gives ammunition to those who would increase application fees.

**Rejected Pension Applications.** A state registrar recently asked about that acceptability of rejected pension applications as proof of service. Some applications rejected by the Bureau of

Pensions are acceptable for establishing service for the SAR. The first step in assessing rejected applications is to determine the reason for the rejection. A very common reason is that the soldier applied under the Act of 1832 and did not serve the required minimum of 6 months. SAR is happy with a single day of service! A few soldiers applying under the Act of 1818 cited militia service, which was not counted under that act. To reduce the pension rolls in 1820, an additional requirement based on need was implemented, resulting in the removal of many men from the rolls. There are many pension applications where one must judge who was the more credible: the applicant or the Pension Bureau. I have seen rejected widow's applications that were so vague one could not determine what the service was, and on the other hand rejected widow's applications where the soldier had been on the pension rolls until he died. I have seen a few applications that were obviously fraudulent. One applicant testified that he participated in a strange combination of battles in both the north and south, without apparent break in service or corresponding to known troop movements. One way to investigate the credibility of an applicant is to look for other applicants who testified that they served under the same officers, especially if he provided enough information to match the tours of duty. This can be done by searching the pensions for the state in question at Fold3. (This can also lead to rewarding information about what an ancestor actually did when on active duty.) I found a number of men who served in the Culpeper Minute Battalion were rejected for pensions. From the details I was satisfied that they in fact served in this unit and surmised that the Bureau of Pensions did not really understand Virginia minute battalions. One cannot place too much weight on testimony about the year of service. Men were often unsure of the year when testifying over a half a century later. They were much better at recalling the season of service.

Don't dismiss a rejected or suspended pension application without looking into the details.

**Efficiency in processing checks.** We recently had a glitch with a batch of South Carolina applications. One application had to be returned to the state due to an administrative error. South Carolina had written a single check for the entire batch. The batch was held before the check was cashed and did not reach the genealogy department until the corrected application arrived back in Louisville about a month later. I am hoping that National can proceed to process other applications in a batch in the future, but I have been told that accounting procedures prevent this. Some states have the applicant write one check to National, one check to the state, and one check to the chapter, so there is a separate check for each application arriving at National. This would have avoided the problem of an entire batch of applications being held. It also avoids a potential bottleneck for getting a check written in the state or chapter.

**Meeting with DAR Registrar General.** On October 30<sup>th</sup> I had the opportunity to meet with Sharon Withers, Registrar General of the Daughters of the American Revolution. We talked for about two hours and covered a wide range of subjects. (And yes, I did make a pitch for DAR to start accepting 1782 Virginia land and personal property tax lists as a basis for patriotic service.) A subject I mentioned in my last email came up: proof of vital data for spouses not in the blood line being proven on the application. The First Families of Kentucky, of which she is a member, evidently accepts SAR applications in lieu of evidence. She has seen a number of SAR applications on which check marks were lacking for spouses not in the blood line being proven. She erroneously concluded that what she saw was evidence of poor staff work in validating the application. Staff in fact checks for proof of each name, date, and place on the application. SAR does not bracket an unproven datum like DAR, but simply leaves it unchecked. SAR requires evidence of lineage and service; it requests and encourages other data called for on the application form. Providing the requested information with supporting evidence is good, current genealogical practice. It can address identity questions and may in the future prevent a line from being closed until an identity issue is resolved. Our policies and guidance afford some flexibility

in how much effort an applicant must make to conduct a reasonably exhaustive search as required under the Genealogical Proof Standard. Excluding a spouse entirely is not reasonably exhaustive. Please not encourage the omission of this information, and under no circumstances should you remove documents submitted by an applicant that are needed to prove dates and places of birth, death, and marriage for either spouse. The applicant is paying to have that information reviewed and validated. Minimalist proofs are no longer in step current genealogical practice and is harming our reputation with other lineage societies, including the DAR.

Providing information about spouses can also reduce the risk of losing a future application fee. Several years ago I had indirect evidence for the maiden name of an ancestor. If that was acceptable to National, proof of her father would be relatively simple. I submitted a supplemental through the woman's husband, got the check mark on her maiden name, and later submitted a supplemental through her without risking the application fee to see if National agreed that my evidence of the maiden name was strong enough.

**Maryland SAR undertakes a worthy project.** The Maryland Society SAR is working on a project to identify sources of Revolutionary service for their state. Registrar Chris Christos and Genealogist Christopher Smithson are doing the heavy lifting on this project. I have asked them to identify those series available on microfilm. We can pass that information on to the Librarian General and the Library Committee to consider for future acquisition. It would be great for other states to undertake similar projects.

Regards  
John

**Email # 4 to State Points of Contact**  
Tuesday, September 30, 2014 7:23 PM

Good afternoon.

I am back the Leadership Meetings in Louisville. Let me begin with those.

The **Genealogy Committee Meeting** was quite productive.

**1. Subcommittee to review acceptability of DAR record copies.** At the request of Chairman Faulkinbury, a subcommittee has been appointed to review Policy 2011-06 regarding use of DAR papers. A number of people have noticed an increase in the number of pended applications due to problems with DAR applications, especially following the policy change in March 2013 concerning the citation of document in addition to DAR's use of check-marks. During roughly my first month in office, 32% of the staff requests for more information about an application involved problems with DAR papers.

**2. Acceptability of personal knowledge in SAR, DAR, and C.A.R. applications more than 20 years old.** The Committee voted to extend the policy concerning documentation of personal knowledge to include knowledge of the SAR, DAR, C.A.R. applicants if the application is more than 20 years old. If the applicant can reasonably had personal knowledge of certain facts on the application, that information will be considered when weighing all of the evidence under the Genealogical Proof Standard. (Under federal rules of evidence, a document over 20 years old can be admitted into evidence as an exception to the hearsay rule.) The amended policy will soon be posted.

**3. Ancestor's purchases of property not Patriotic Service.** The Committee considered a case in which a person purchased land that had confiscated from a Tory. I had ruled that this did not provide Patriotic Service under our current rules and informed the Committee. The Committee had previously been aware of the purchase of goods and services from the government with the proceeds being used to support the War. Some purchases of this kind were called taxes, but were excluded from qualifying ancestors for patriotic service in the policy Revolutionary Service Based on Payment of Taxes (2012-06, Section B-2). These included the purchase of marriage licenses. I had used this policy as the basis for my ruling, but brought the issue to the attention of the Chairman Faulkinbury in case the Committee wished to take action. The Committee chose to take to no action to establish a policy recognizing such purchases as evidence of service.

**4. Subcommittee on requirement for applicant's birth certificate.** There is support on the Committee to allow evidence other than a birth certificate to prove the applicant's date and place of birth and/or parentage (Policy 2005-04). The Committee encountered difficulties in wording the change on the spot and referred the matter to a subcommittee.

**5. Youth Registration was replaced by Youth Registrant program.** The difference between the Youth Registration Program which was replaced by the Youth Registrant program in 2001 will be covered in the Application Preparation Manual. The Youth Registrant Program required submission of an application and documentation for staff approval, but the previous Youth Registration Program did not.

**6. DAR Chapter Copies after 2009 acceptable.** A subcommittee formed at the Spring 2014 meeting reviewed a request to consider acceptability of DAR "Chapter Copies". The subcommittee recommended that Chapter Copies produced after 2009 when the DAR began making available electronic/digital Chapter Copies and meet current SAR standards should be accepted. The recommendation was approved by the Committee and the APM will be updated to reflect this change.

**Genealogy Workshop held at Leadership Meeting.** The Genealogy Workshop was well-attended. We picked one topic each under each of two general headings: improving the efficiency and ease of application review, and looking for opportunities to prove service or lineage when you think you are stuck. Denise Hall spoke on printing documentation so it is readable. She working on a shortened version suitable for email or posting. I spoke on use of indirect evidence and will plan to make talking points available, but after I honor commitments to give the talk to some nearby chapters. A couple more presentations should improve the presentation anyway. A workshop will be planned for the Spring Leadership Meeting.

**Staff transfer.** Susan Acree has been transferred to the Merchandise Department, where there is a critical staff shortage. We thank Susan for her service to the Genealogy Department for many years. President General Brock and I will be monitoring the throughput of applications closely to ensure that we do not have a backlog problem. The Genealogy Department staff is reporting directly to Don Shaw. You can provide additional information that had been requested by Susan to Don and he will assign the review to another staff member.

**Unacceptable documentation being submitted.** We have been receiving unacceptable documents with applications from state registrars who know better. Undocumented family trees and other undocumented pages from Ancestry.Com are prime offenders. In some cases, this is the only material submitted to support a claim. You should require these applications with documentation to be corrected and not submit them to National. In other cases the material is submitted in addition to acceptable proofs and it merely clutters our files. I spoke with one of the state registrars and learned that in his case the documents were cited on the reverse of the application. He was reluctant to remove documents cited as sources on the application, even though he knew they were both unnecessary and unacceptable. In cases like this, please notify the chapter that the practice is not productive and merely slows down the review. Please add a copy of your message to the package so we know that you are trying. If this does not work, we will want to come up with an alternative that will.

**Personal standards vs. SAR standards.** It has come to my attention that some of you, especially some who are very good genealogists, are holding applicants to your personal standards even when they are above the organization's standards. I understand the motivation to do this, as I have had the temptation myself. More than once I told an applicant that I thought the application would be approved as it was, but recommended.... Usually the advice was followed. We must hold an applicant to the standards of the organization, not higher standards to which we hold ourselves. On the other side, there are occasional instances of a document, such as a spouse's birth record or a marriage record, being withheld because it is not essential to the blood line. You should not do this. SAR encourages applicants to proven every fact possible that is called for the application, and it is the right of the applicant to prove any fact requested. Two years ago we had an unpleasant and unnecessary situation when an applicant applied on one of his mother's patriots. The application was pended for want of the parents' marriage certificate, which had been removed from the father's application by the state registrar because the mother was not in the blood line.

**State point of contact email list.** Finally, we are making progress on seeing that my email list does cover all state points of contact. Some states want more than one person notified. If you notice the omission of someone who should be receiving these emails, please let me know.

Regards,  
John

**Email # 3 to State Points of Contact**  
Thursday, September 4, 2014 5:23 PM

Good afternoon, Gentlemen.

Since my last email to you a lot has been going on.

**Genealogy Workshop Scheduled for Leadership Meeting.** A Genealogy Workshop is scheduled for 1:30 PM, Friday, September 26<sup>th</sup>. It will be held in Citation Room B at the Brown Hotel, the lower level. I will speak on proofs of lineage using indirect evidence and Denise Hall will speak on how to improve the documentation of applications.

**Application Corrections Program.** We are in the process of formalizing an application corrections program. Members can already submit updates and corrections, but now staff is working on procedures to queue and track corrections. Not only do we want information that is correct and complete, but the applications of many members no longer meet current standards. Unless documentation is brought up to current standards, close relatives joining on the applications will be grandfathered. *Members are encouraged to bring their proofs of lineage up to current standards so their close relatives can join using their applications without being "grandfathered."*

**Updates from information provided with supplementals.** When a supplemental is submitted with new information about proof of lineage, vital statistics, or service, staff will update that applicant's previously approved applications, as well as those of close relatives if they are identified. The supplementals genealogists were already doing this on their own initiative, but the practice has been now formalized. Applicants should note such documentation with the application package to ensure it is not missed as an update or correction..

**Checks in the citations section.** When applications are reviewed, in the references section checks will be placed for those citations for which documents received and used. Staff sometimes requests additional documentation. Staff will add citations for such documents, as well as for documents that they find and add to the file to complete proofs. This will increase the usefulness of record copies purchased at a later time, and well as ensure that applicants are aware of any additional documentation added to the file after the original submission.

**DAR electronic record copies not stamped.** Some chapter registrars are apparently telling applicants that electronic copies of DAR applications are not acceptable because they are not stamped "Record Copy." Newer record copies are not stamped, but a DAR URL is printed at the bottom (see Application Preparation Manual). They also have a replacement for the first page.

**Virginia revolutionary tax list subscription donated to SAR Library.** A subscription to the BinnsGenealogy.Com tax list club has been donated for the Genealogy Department, giving them access to about 2/3 of the 1782 and 1783 Virginia personal property taxes. These taxes supported the Revolution and provide evidence of patriotic service. Within an hour of the site being available, one staff member used it to find valid service that prevented an application from being pended. This is intended to aid staff in rescuing applications with Virginia service problems, NOT for staff to complete documentation that should be done by applicants and volunteers assisting them.

**Revolutionary tax lists as evidence of Patriotic Service.** This last point brings up an opportunity that has not been adequately publicized. In 2012, the Genealogy Committee extended the taxes that provided a basis for patriotic service from the Pennsylvania Supply Taxes to any state's Revolutionary taxes that supported the War or addressed a request of the Continental Congress. For the fine print, see Policy 2012-6 at <http://www.sar.org/sites/default/files/docs/nssar-forms/NSSAR%20Genealogy%20Policies-2013-10-03.pdf>

The Subcommittee on Revolutionary taxes remained in service to identify tax laws and records that provide a basis for patriotic service. The Subcommittee has determined which tax laws do and do not qualify for New York, New Jersey, Pennsylvania, Delaware, Maryland, Virginia, and North Carolina. It has identified a number of particular tax records that qualify for the states of Pennsylvania, Maryland, and Virginia. Links for these reports can be found at <https://www.sar.org/Committees/Genealogy/Tax-lists>

For those states for which reports are not available, the applicant can make the case himself that a particular tax record was mandated by a qualifying law and provides evidence of patriotic service.

**Maryland, Pennsylvania, and Virginia Revolutionary tax lists accessible from home.** For Maryland, Pennsylvania, and Virginia many lists are accessible from your home. The Maryland Society SAR has posted qualifying Maryland lists at its web site.

<http://marylandsar.org/marylandtaxlists>

These lists are also on the computers at the SAR Library. For Virginia about 2/3 of the 1782 and 1783 personal property tax lists are commercially available at BinnsGenealogy.Com. The microfilms of 1782 and 1783 personal property as well and land taxes are available on interlibrary loan from the Library of Virginia. The Subcommittee on Revolutionary Taxes is in the process of putting copies of additional taxes, the "specific" taxes, into pdf format. Most of these lists are in paper format and not accessible outside the Library of Virginia. For Pennsylvania there are two readily available sources, both of which have limitations. The published series *Pennsylvania Archives* includes many Revolutionary taxes that provide evidence of patriotic service. These books are available in many libraries and at Fold3.Com. Unfortunately, the titles of the lists were often changed for publication. Ancestry.Com has posted images of many Pennsylvania taxes. They have not posted many of the title pages, despite complaints. As a result, one cannot always determine from these sources alone whether a list provides a basis for patriotic service. The Subcommittee's report *pennsylvania\_lists.pdf* explains how to use the Pennsylvania Archives inventory to identify the particular tax records that do provide evidence of patriotic service.

I will say more about Revolutionary taxes in the future. For now, however, you have information to take advantage of this opportunity and find under-used evidence of patriotic service.

Regards,  
John

## **Email # 2 to State Points of Contact**

Thursday, August 07, 2014 9:48 PM

Good evening.

**Meeting with Genealogy Department.** I visited the Genealogy staff in Louisville two days earlier this week. I met with each genealogist one-on-one on Tuesday. President General Brock arrived on Wednesday and we had a Genealogy Department staff meeting, also attended by Executive Director Shaw. In the afternoon I met again with genealogists individually to review questions they had about specific applications. I was very pleased with the exchanges of information.

**Signature by state registrar.** I have instructed staff to ensure that each application they review has been signed by the state registrar, or the assistant state registrar if your state has one and has informed National of the scope of signature authority of the assistant. We really must not have staff spending time on applications that have not undergone genealogical review at the state level. If someone will be covering for you because you are going on a lengthy vacation or have a health issue, please let Don Shaw and me know who that will be and about how long they will be assuming the duties of genealogical review and signing for you. If you are not the registrar for your state, please make sure he received a copy of this email, showing I have correct contact information for him.

I have discussed with the staff several matters of concern. These include:

**1. Old transcripts and abstracts of family records are admissible.** When an old transcript or abstract of a family record is submitted as evidence, it is admissible, which is not to say it must be accepted as true or as proving what the applicant might hope. There are numerous documents transcripts and abstracts in the files of SAR, DAR, as well as published. There is often no way for an applicant to locate the original record to prepare an abstract or transcript with the scope and detail that we would expect in such a secondary record today. We should avoid excluding evidence from consideration, but under the Genealogical Proof Standard should weigh them with the other documentation on their merits.

**2. Grandfathering an application does not close the line for other applicants who are related close enough.** Some staff members were sending emails advising you that an application was eligible for approval based on an old application under the grandfather clause, but this would close the line. That is not correct. The "line" is not closed, but the newly accepted application is not eligible for grandfathering future applications until the deficiency in the proof of lineage is resolved. Other relatives with the proper degree of kinship could continue to be approved for membership citing the old application under grandfathering.

**Multiple copies of same documents for different generations not needed.** Staff asked me to remind you that they do not need multiple copies of the same documents used for different generations. For example, if you use an 1850 census to show the age of the parent as well as the age of the child, submit only one copy, not two. Similarly, unless it is a controversial point, do not submit documents that prove only the same thing. For example, if you can use the 1850 census to prove state of birth for an ancestor, do not submit the 1860, 1870, and 1880 censuses to prove the same thing unless this is a controversial point that needs confirmation.

Regards  
John

## **Email # 1 to State Points of Contact**

Fri, Jul 25, 2014 at 2:25 PM

Good afternoon.

The SAR Congress in Greenville was the largest SAR Congress ever. You will have special interest in the following decisions.

**Supplemental Application Fee Increase.** Congress raised the fee for a supplemental fee from \$40 to \$60, and from \$20 to \$30 for additional supplemental applications submitted under the family plan. The proposal was to increase the amounts to \$80 and \$40, but this was amended by a vote of roughly 140 to 110. The fee increase was effective at the close of Congress, which was Wednesday, July 23<sup>rd</sup>.

This morning President General Brock and I discussed when a supplemental application should be considered as submitted. If you have an application signed by the applicant no later than July 23, 2014 with a check for the old National fee signed and dated no later than July 23, 2014, that application will be considered as submitted. If an application and/or check was signed after July 23<sup>rd</sup>, please remit the new amount to National when you transmit the application.

**Genealogy Committee Chairman.** Jim Faulkinbury will be the new chairman of the Genealogy Committee. Tim Ward stepped down as chairman due to possible conflicts with the Leadership Meeting schedule this coming year.

**General Officers Elected.** There were no nominations for general officer positions from the floor. All unopposed candidates were elected by acclamation. In the one contested race Michael Tomme was elected Treasurer General over Larry Cornwell.

**Point of Contact Address List.** I have received two slightly different lists of email addresses and combined them. I have also added a couple of assistant state registrars. If you are not the state registrar or an assistant state registrar, please let me know who is. I would also like contact information for assistant state registrars and the extent to which they have signature authority for applications.

I look forward to working with you during the coming year.

Regards  
John