



## **Chapter Presidents Zoom Call**

December 14, 2022 | 2 pm ET

**Chapters Represented** –Chattanooga, Greater Cincinnati, Mary Ball Washington, Pensacola, Sacramento, Tucson, Utah, and Valley Forge

**Special Guests** – Bonnie Anderson, Director of Accounting; Julia McManus, Your Part Time Controller, and Deepak Bhagat, Associate Director of Education

### **Welcome**

Carolyn welcomed everyone on the meeting and thanked all for taking the time to join us for the Zoom call especially during this busy holiday season.

### **Yearend Financial and Activities Report**

The yearend financial report worksheets have been sent to all Presidents and Treasurers via mail and email. Please contact Carolyn at [csantangelo@ffvf.org](mailto:csantangelo@ffvf.org) if you have not received the financial worksheets.

The forms are essentially the same as they have been over the years. There are some updates. First, we now need name and address for all donors who give over \$1,000. This is coming from the auditors. If you need a 2<sup>nd</sup> sheet to list all your donors, please let us know and Carolyn will send you extra pages. Tolar from Mary Ball Washington Chapter gave the suggestion to have donor levels with names of each level to help entice individuals and organizations to give and perhaps give more to reach a certain level. Carolyn mentioned that headquarters has a donor club with those type of levels. Carolyn was asked to send those levels to chapters.

Second update is on the fundraising worksheet. All fundraisers even small ones must be listed on the worksheet. Your total for fundraiser expenses on the worksheet must match your total fundraiser expenses on the main report. This also applies to fundraiser income. This year we also need to know if a sponsor's donation towards a fundraiser had any added value. If you gave your sponsor full value for their donation, you do not need to worry about added value. An example of added value is if someone gave \$1,000 for a table of 10 and with that donation, they had the added value of a meal for \$25 per person. Their donation would have a total added value of \$250 and their donation that is tax deductible is \$750.

One point of clarification, we are requiring a copy of all bank statements beginning with 1/1/22 and going through 12/31/22. If you get your statements electronically, you can forward directly to Carolyn's email.

The president's activity report that usually accompanies the financial report is now available online to be filled out. We are trying this electronic report format to make it easier for presidents to completed and just hit send. The form is in the chapter section of the website under chapter resources. Here is the link -

<https://www.freedomfoundation.org/chapters/chapter-resources/volunteer-chapter-annual-activities-report-questionnaire/>

Hopefully this will be user friendly and save on paper and postage.

Finally, with all these reports we also need a current roster of your membership with their contact information and a list of all officers. This helps us to keep a good record of the number of members we have nationwide and lets us better communicate with them.

## **Freedoms Foundation at Valley Forge Updates from Headquarters**

### **Campus Improvements**

The ongoing campus improvements were discussed. The sewer project's end is finally in sight. Right now, it just basically paperwork and permits holding things up. The work has been completed. The only work left to be done is tearing down the current sewer treatment plant on campus.

The next project is new windows for the MacArthur building. We have quotes from 3 contractors and it's looking to be about \$800 a window. We are also looking into quotes for the replacing/redoing the lighting on campus. Both the windows and the lighting are all courtesy of the AMVETS Ladies Auxiliary.

### **75<sup>th</sup> Anniversary Planning**

Our 75<sup>th</sup> Anniversary year is 2024. We are looking to have celebrations throughout the year on a national and chapter level. At headquarters, we are forming a 75<sup>th</sup> Anniversary planning committee. This committee will include some chapter members. The committee will start meeting in early 2023 to begin brainstorming and planning events and marketing efforts. Jason, Sarah, and Carolyn will be leading efforts on the staff side.

We want the chapters to play a big part in the celebrations and to have their own 75<sup>th</sup> Anniversary celebrations at the local level. Please consider forming your own 75<sup>th</sup> Anniversary committee to discuss ways to celebrate this milestone.

Any collateral and logos created for the anniversary will be shared with the chapters. Again, this will be a group effort and updates in the planning progress will be given frequently.

### **Staffing Updates**

After 45 years of service to Freedoms Foundation at Valley Forge, Maureen Troutman is retiring. Her last day in the office will be this Friday. Maureen is currently part of the education team where she started at age 17. During her time here, she has also been in the development office, worked with chapters, was secretary to the president and has worked with our national board. We are all going to miss her greatly. If you know or have worked with Maureen, please feel free to send her an email or give her a call before she leaves.

We recently had two new staff members join us. Staci Bell in the Education Office and Lara Kennedy in Advancement. We are excited to have both on the team.

Staci is leading efforts for the teacher registrations for the summer programs so your education vps will be working with her.

## **Education Updates**

### **Graduate Programs**

Applications are now open for all. We will continue to accept applications until programs are full. Acceptances will be going out in February. We have a flyer advertising the programs. The PDF is included in the email with the minutes.

Staci will be reaching out to chapters with a list of teachers who have been accepted to a program from their area. If you can assist with travel for these teachers, I know it will be greatly appreciated, but it will also be good contacts for you to reach out to for membership. If you plan on sponsoring teachers or assisting with travel, please let Staci know for planning purposes in case we need to hold space for them as any chapter sponsored teachers get preference.

### **Spirit of America**

I know many of you are in the process of selecting students for the spring. Just remember to send Carolyn and Deepak a list of your students. This way we can help ensure that all students complete their registration process. When you are ready to hold orientation meetings or send out letters, we can send you links directly to the student registration pages for your SOA date. The process is new this year and much more user friendly. Students will be able to start the registration process and save it to return to later if they need to get their parents or look up insurance information. We can also send you the detailed registrations via email for your chaperones to have on file with medical concerns and parent contacts and signatures.

If your chapter is planning to do any extras either before or after the Spirit of America Program, please let the education team know as soon as possible. Deepak will be happy to help set you up with extra bus time, tickets to the American Revolution Museum or the National Constitution Center. Tolar from Mary Ball Washington enquired about places to visit if there is extra time. Marty from Utah mentioned running the Rocky steps, visiting Ben Franklin's grave, and getting cheesesteaks. Marty also alerted everyone that the cheesesteak shops do not accept credit card. The students must have cash or if they have a debit card there is an ATM nearby. Recommended to tell your students to be prepared with some cash.

Deepak Bhagat, Associate Director of Education, joined the call to talk about the new initiative he is working on for Spirit of America. He is establishing a student ambassadors program to help promote Spirit of America and build a legacy of student alumni that will help with future programs and potentially help the chapters. We hope that by building this group we will have a stronger connection to the students who have participated in our programs. The education program staff will be on the lookout each program for those student leaders that really stick out. If you see students within your groups that rise above the others, please alert our staff, and help us find worthy student ambassadors for Spirit of America and Freedoms Foundation. Deepak is working on an outline of responsibilities and what

we are looking for in an ambassador. He will share with the chapters. It was asked what ages we are looking at for this opportunity and we are looking for juniors and seniors. They will be invited to attend another program. Their tuition would be covered but travel still needs to be discussed. For the pilot program it has only been local students. We cannot pay the students at this time but are looking at this as an internship and will be able to write recommendations and offer future employment opportunities as program staff once they are out of high school and over 18.

### **Awards Update**

Upcoming Ceremonies – Please make sure we have your date so we can get material to you on time and have the certificates dated correctly.

Youth Essay for 2023 – March 1<sup>st</sup> deadline – Please submit at any time. We will review in March and notify you and the students in April. Great way to recognize students early who wrote essays for Spirit of America application. Can honor them at their schools or at the student luncheons after SOA.

Marty from Utah asked that headquarters makes sure to send a list to the chapter of recipients before sending out letters to the recipients.

### **Other News and Notes**

For your webpages, if you have any updates on events, photos, new information, etc.... please send to Carolyn so that she may update your webpages. If you would like a certain photo to be featured on your page, please send the photo to us, and let us know you wish it to be featured. Carolyn plans to update the feature photos in January to keep the pages fresh.

David is planning his 2023 schedule. If you are looking for a keynote speaker for an event or would like to have David at your chapter's fundraiser, please let us know and we will work to accommodate all requests.

### **Chapter Input – Open Floor**

Lynn from Pensacola asked for clarification if all youth were eligible to participate in the youth essay contest even if they did not attend Spirit of America. The answer is yes, any students K-12 can participate in the essay contest and win. There is no requirement to be part of Spirit of America.

With no further questions, Carolyn wrapped up the meeting and thanked everyone for attending. She also thanked everyone for a successful 2022 and is looking forward to 2023. All the numbers are looking like we will have our best year since the pandemic and can't wait to get things rolling. Thank you all and Happy Holidays!

**The next Zoom meeting will be on Wednesday, March 8<sup>th</sup> at 2PM EST**

### **2023 Meeting Schedule**

Wednesday, March 8<sup>th</sup> at 2PM ET  
Wednesday, June 14<sup>th</sup> at 2PM ET

Wednesday, September 13<sup>th</sup> at 2PM ET  
Wednesday, December 13<sup>th</sup> at 2PM ET