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Annual Report

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FORTY-FIFTH SAHS ANNUAL MEETING

1. Invitation and Agenda

SWISS – AMERICAN HISTORICAL SOCIETY
Washington D.C.

You are cordially invited to attend the

FORTY-FIFTH SAHS ANNUAL MEETING
at the
Arch Street Friends (Quakers) Meeting House
Fourth and Arch Streets
Philadelphia, PA 19106

SATURDAY, OCTOBER 11, 2008

PROGRAM

9:00 a.m.	Arrival and informal gathering; Coffee, Rolls
9:30 a.m.	Business Meeting
Noon	Luncheon, in-house
1:30 p.m.	Dr. Richard J. Castor “The Suffering and Solution to a Socially Stymied Swiss Family – 1710”
2:30 p.m.	Break, Coffee
2:45 p.m.	Marianne Burkhard OSB “A Weaver in Moscow – A Benefactor in Basel- Land: Heinrich Handschin 1839–1894”
4:00 – 4:30	Departure

FORTY-FIFTH SAHS ANNUAL MEETING

October 11, 2008, Philadelphia, PA

AGENDA

1. Welcome and Call to Order
2. Approval of the Minutes of the 44th Annual Meeting of Oct.6, 2007
3. President's Report: *Heinz B. Bachmann*
4. Elections: Vice President, Switzerland *Rosa Schupbach*
Board of Advisors, Class of 2008-2011
5. Membership Report: *Ernest Thurston*
6. Treasurer's Report: *GionMatthias Schelbert*
7. Publications: *Profs. H. Dwight Page, Jürg Siegenthaler*
8. Report on SAHS-Switzerland: *Fred Jenny*
9. Long term outlook: *see attachment*
10. Proposed Budget for 2009: *Heinz B. Bachmann*
11. New Business
12. Next Annual Meeting
13. Adjournment

2. Reports

A. Minutes of the Forty-Fifth Business Meeting of the Swiss American Historical Society

Philadelphia, PA, October 11, 2008

1. The meeting was called to order at 9:30 a.m. by Heinz Bachmann. He welcomed those present including Daniel Haener, Deputy Consul General from the Swiss Consulate General in New York. Mr. Haener confirmed that the Swiss Roots project was still going on albeit on a modified basis.
2. The **Minutes** of last year's Annual Meeting were approved unanimously.

3. President's Report.

Heinz Bachmann acknowledged the generous contributions of several members of \$1000 to \$4000 each including Barbara Keller of Zürich, a member of many years who retired for reasons of health and age, the Paroz family, Margot Durrer Ammann and Lewis Rohrbach. With regrets the President reported the death of Jacques Schoch, one of the longest standing members of the Society who, with his wife Simone, had attended the Society's Annual Meetings for many years, and the deaths of Roger Jeanloz, Rob Mueller and Albert Uster. The customary moment of silence was observed.

The major events of the year were the two new-book-launches of the Otto Wyss book **Postmaster in Klau**. Even with the help of dedicated members like Donald Tritt in Ohio and Jürg Siegenthaler in California, last years' book-launches showed that without a well-established local partner like the extended Wyss family, such book-launches are unlikely to further the interests of our Society or attract new members. Another attempt to attract new members at the Annual Meeting of the American Historical Society in early January in Washington DC was also unsuccessful.

This year the Society published no new books. Planned publication of the book "The Way of Life of the Amish in Bern, Indiana" slipped out of the FY as a result of repeated difficulties which prompted Lewis Rohrach, the SAHS publisher, to suggest changes in publishing strategies. These suggestions will be discussed as item H of today's agenda. The difficulties were a major reason for the resignation of Jürg Siegenthaler as editor and Lewis Rohrbach as a member of the Society's Editorial Board. In the

interim, Leo Schelbert has agreed to resume the position of Editor. Despite these difficulties Society members received a free book, a short biography of **Albert Galatin** by former Ambassador Benedict von Tscharner, Chairman of the Foundation for the History of the Swiss Abroad, at a cost to the Society of less than \$5 per copy.

Two issues of the *SAHS Review* were prepared by H. Dwight Page and a third by Leo Schelbert the latter devoted to the life of Iris von Roten, a prominent feminist in Switzerland in the 1950s.

Request for financial assistance. At the last Annual Meeting the membership approved a grant of \$1000 as seed money to the project of establishing a Swiss Nationality Room at the University of Pittsburgh. The Swiss Nationality Room Committee has now asked for additional funding. After discussion the membership voted unanimously against the request.

A second request came from the family von Graffenried, the organizers of the 300 Year Celebration of the Founding of New Bern, North Carolina. An exhibition is planned in Switzerland for 2009, to be moved to New Bern in 2010. Heinz Bachmann recommended that a \$1000 grant be allocated. After discussion the meeting approved such a grant. The SAHS will be listed as one of the donors. Given the great importance of this founding for the history of Swiss immigration to the United States, the June 2009 issue of the *SAHS Review* will be dedicated entirely to this subject. The meeting agreed furthermore that 200 copies of this issue be given for free to the organizers. The organizers themselves plan to buy 1,000 additional copies from Picton Press at no cost to the Society. The feasibility of organizing a SAHS meeting in New Bern in 2010 was also discussed and tentatively approved, preferably in the form of a Special Meeting not an Annual Meeting.

The SAHS received several requests for information on genealogy which were referred to L. B. Rohrbach, *Guide to Swiss Genealogical Research*, to other experts in genealogy and to the Swiss Roots website.

An unusual request came from the great-great-grandson of a Swiss who had immigrated to Michigan from the Canton of Valais. The grandson had found numerous letters and documents written in French in his ancestor's barn and had put them on a CD although he speaks no French. During the ensuing discussion it was pointed out that these documents may be important enough for an entire issue of the **Review**, or even a book as very little information is available about immigration from the Valais.

Gonzenbach and Paroz Prize. It was proposed that the Paroz Price for \$1000 be given to Ms. Marlene Groves of Picton Press in recognition of her untiring efforts on behalf of the SAHS. After a motion this proposal was accepted unanimously.

Miscellaneous. This past summer Fred Jenny had organized a successful reunion of the SAHS Swiss Chapter at the headquarters of the Foundation for the History of the Swiss Abroad in Geneva that Heinz and Ilse Bachmann attended.

Heinz Bachmann also reported that the Board of Directors had a very productive get-together on the eve of the Annual Meeting. As Board members are widely dispersed throughout the US and Switzerland such meetings provide the only opportunity to discuss common issues and concerns. Heinz Bachmann expressed the hope that these meetings become an official, standard procedure.

Donal Tritt briefly reported that the planned creation of a Lesquereux archive is progressing slowly, but conditions for disbursing the SAHS grant were not yet fulfilled.

Before concluding Heinz Bachmann thanked each member of the Board for her and his hard work to keep the Society alive and healthy. He also thanked Leo Schelbert for his untiring dedication to the Society.

4. Elections.

Concerning the Board, only the office of Vice President (Switzerland) needed to be filled. Fred Jenny, who has been serving since October 2005 was re-elected unanimously for another 3 year term.

A new Class of the Board of Advisors for 2008-2011 was elected unanimously with four incumbents and Leo Schelbert replacing Lewis Rohrbach who did not want to be re-nominated. The members are:

Karl Niederer
 Franz Portmann
 Elsbeth Reimann
 Leo Schelbert
 Paula Sherman

5. Membership Report

In the absence of Ernest Thurston, Heinz Bachmann presented the Membership Report. He announced that the Society has currently 251 members, i.e. six more or a 2% increase than last year. Five more, who joined shortly before the end of the FY are not yet included in this total. Including these newcomers, the losses from the last two years have been recouped. There were also two new life memberships, i.e. Dr. Konrad Basler (Switzerland) and Fred Gillespie (NJ).

While the situation has improved somewhat it remains very shaky. Even though the new enrolment of 21 was indeed very high, much was due to special circumstances not likely to repeat themselves (Otto Wyss

descendants, Switzerland catch-up). Four new members were gained just in the small town of Paso Robles; will they last? The Society must recognize that a lot of new members disappear within 10 years. Hence, there still is an urgent need for all of our members to recruit new adherents through personal contacts.

A discussion followed about the usefulness of regional meetings, as in the past such meetings had not brought in many new members. To create a wider exposure for the Society, other venues were mentioned such as those suggested in the book "Gorilla Marketing". Marianne Burkhard stressed the importance of publications and praised the work that a small society like ours has accomplished over the last 40 years. The possibility of an Annual Meeting in New Bern was also discussed but preference was given to a Regional Meeting.

A detailed membership report and table are presented after the Minutes.

6. Treasurer's Report

In the absence of the Treasurer, GionMatthias Schelbert, Heinz Bachmann presented the Treasurer's Report. The good news is that the Society has suffered relatively little from the Wall Street downturn so far, due in large part to the decision made at last year's Annual Meeting, when the Treasurer suggested that a substantial part of the Society's assets be moved from the Vanguard STAR FUND to fixed income accounts. On Sept. 30, the Society's net assets amounted to about \$72,500, with the Swiss Chapter holding an additional nearly \$11,000 in its postal checking account.

A discussion followed about the present monetary structure and the advisability of moving some funds back to the Vanguard Fund.

The bad news is that Heinz Bachmann was unable to submit a detailed Profit and Loss Account. The draft he had received shortly before the Annual Meeting included large discrepancies, possibly due to double counting of some expenditures. Additional details are presented after the Minutes.

The meeting decided to approve the preliminary accounts with the proviso that the discrepancies be resolved and the final accounts be published in the February 2009 issue of the *SAHS Review*.

7. Publications

In the absence of Jürg Siegenthaler Leo Schelbert proposed as the next publication a book on Arnold Guyot, the Neuchâtel born natural scientist/geographer and one-time professor at Princeton. It is being prepared by Professor Philip K. Wilson at Pennsylvania State University specifically for publication by SAHS. The text is unlikely to be ready for publication before

the end of this FY and no provisions were made for this project in the 2008-2009 budget.

H. Dwight Page reported that he is now working for Bryan College which is increasing its French Studies. French scholarships are available for deserving students. He presented his plans for future **Reviews**, including articles about the battle of Morgarten and the South Carolina and New Orleans areas.

8. Report on SAHS Switzerland

Fred Jenny pointed out that the Swiss Chapter has now 50 members, that all dues have been paid for 2007-2008 and that he is continuing his efforts to attract new members. A meeting was held last July at the Musée de Penthes in Geneva which houses the Foundation of the History of the Swiss Abroad. The audience, including Heinz and Ilse Bachmann, took part in a tour of the Museum followed by a luncheon on the premises. The next membership meeting is scheduled for Friday, July 24, 2009 in Zürich.

9. Long term outlook for the Society

Due to his frustrations with the preparation of the Bachmann-Geiser book and based on his long experience in dealing with historical/genealogical societies Lewis Rohrbach made seven suggestions on how SAHS could reduce its operating costs. They are presented in agenda item H after the Minutes.

During the lively discussion that followed, it was pointed out that the Society's cost structure is fundamentally different from that of the old established professional associations operated by a costly staff and incurring high fixed costs. The SAHS is run entirely by volunteers with no fixed costs. Relating to the suggestion to publish on CDs only, Leo Schelbert pointed out that after 10 years floppy discs can no longer be read and that the past can only be kept alive through the printed word. To lower expenses, some historical societies have started sending books to interested members only. However, a minimum of 300 copies is needed for a publisher to accept a printing assignment. Even with the present system the Society hardly reaches this threshold. (*A very important reason for SAHS to make every effort to recruit more members so as to prevent membership from declining below this limit.*) Finally, at the moment there is no compelling financial pressure to reduce services at any costs. If managed prudently reserves, while declining, are sufficient to maintain operations at about the present level for the foreseeable future.

After a lengthy discussion no formal decisions were taken. However, a fairly strong consensus emerged against proposals one and five i.e. to immediately replace the printing of books and *Reviews* by CDs and a

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website respectively. It was somewhat less strong against proposal two i.e. to distribute books only to members asking specifically for a copy. The four other suggestions, only briefly discussed, raised little objections.

10. Proposed 2008-2009 Budget.

Heinz Bachmann presented the proposed budget for 2008-2009 as detailed after the Minutes. The proposal was approved unanimously.

11. New Business.

Rosa Schubach briefly reported on her recent visit to Helvetia, WV, a settlement established by Swiss immigrants in 1869. In his book, "One's Own Hearth is Like Gold, A History of Helvetia, West Virginia", published by the SAHS in 1990, David Sutton, a descendant of one of the early settlers and SAHS member, describes the immigrants' heroic struggles to establish a new life in the wild Appalachians. A visit is highly recommended.

12. Annual Meeting.

The next Annual meeting will be held on Saturday, October 10, 2009 in New York City.

13. Adjournment. The meeting was adjourned at 12:10 PM.

Submitted by Rosa Schubach, Recording Secretary

B. President's Report

Welcome to the 45th Annual Meeting of the Swiss-American Historical Society. It is always a special pleasure to meet in Philadelphia at this beautiful, old Arch Street Meeting House. As some of you might remember three years ago Ambassador Loretan gave us an exciting report about the up-coming "Roots" project; since then the project has largely run its course; it still exists, but things have calmed down a bit.

Thanks and gratitude to a number of generous donors who have supported our Society with special contributions, including Ms. Barbara Keller from Zürich who after a long membership decided to give up membership for health and age reasons; the Paroz family that once again made a substantial contribution to their earlier endowment; as well as Margot Durrer Amman and Lewis Rohrbach who contributed generously to a scheme allowing the Bachmann-Geisers, authors of the *Amish in Indiana* book, to pre-pay the translator of the book without using Society funds.

Report on **four deaths** among our membership. The longest standing member was Jacques Schoch. He and his wife Simone had joined the Society in 1965, part of the first group of new members joining after the resurrection. Both were active until recently, participating in most Annual Meetings. As of today, in addition to Mme. Schoch only one other member of that group figures still on the Society list, Hedi Moore; Roger Jeanloz was a member of the class of 1966, Rob Müller had joined in 1988 and Albert Uster in 1997. Let's observe the customary moment of silence in honor of the four deceased.

Among **last year's activities** the first major events were the two **new-book-launches** of the Otto Wyss book *Postmaster in Klau*. They have been described in some detail in the February issue of the *SAHS Review* and I won't repeat what had been said there expect to emphasize again the three key lessons learned:

- (i) as both Donald Tritt and Jürg Siegenthaler found out with the Lesquereux book in Columbus, Ohio and the Wyss book in California, organizing new-book-launches is extremely time-consuming and a heavy burden for the responsible Society officers;

- (ii) without a dedicated, strong, and well-known local partner [like the extended Wyss family] they are unlikely to achieve the desired results concerning recruitment of new members, book sales, and general publicity for the Society. Even an active support from a Consulate General or a local historical society won't do the trick;
- (iii) the books' content has to be suitable. A strong local focus is essential, as was the case for the Wyss book; forget about defused, word-wide scientific prominence as in the case of Lesquereux.

Conclusion: as attractive as they may appear at first glance, new-book-launches are likely to remain an exception rather than the rule for the Society's future publications and are not likely to play a mayor role in future membership recruitment efforts.

In another attempt to recruit new members, Jürg Siegenthaler and I put up a fairly large stand at the Annual Meeting of the American Historical Society in Washington in early January. Result: zero. While quite a few people dropped by they mostly wanted to reminisce about their recent vacation in Switzerland and the good time they had there.

Book publishing: The Society published no books last year. The last book the Otto Wyss book was published shortly before the beginning of the year; the next *The Way of Life of the Amish in Bern, Indiana* is scheduled to come out soon after the beginning of this year. Publication of the latter, seemingly a straight-forward, routine operation was beset with problems from the beginning; as soon as one was solved two new ones would crop up. Among others, this triggered the soul-searching effort about future book publishing strategies by our publisher, Lewis Rohrbach that will be discussed as agenda item H. The unusually large amount of time spent on rather unpleasant discussions and haggling of all kinds was a major reason for Jürg Siegenthaler to resign as book editor once this project is completed. It also led Lewis Rohrbach to resign from the Society's Editorial Board. As an interim measure, Leo Schelbert has agreed to act once again as the Society's book editor.

Even though the Society has not published a book last year, members still received a free book, a short biography of Albert Gallatin by Ambassador Benedict von Tscharnier. Thanks to Fred Jenny's close contacts with the ambassador the book was offered to the Society at less than \$5 a copy or half the Swiss price. We felt this was a very good deal for our members.

As has become a tradition for the **SAHS's Review** two issues were prepared by Prof. Dwight Page in his usual competent way presenting some SAHS classics such as *The Planting of New Bilten WI* but also a very

interesting analysis of the link between the black death epidemic and the persecution of Jews in Switzerland in the mid 14th century. The third, prepared by Leo Schelbert was devoted entirely to the feminist movement in Switzerland, focusing specifically on the life and writings of Iris von Roten, a very active and controversial fighter for women's equality; she had lived for a year in the US in the late 1940s.

Next year's program will be presented by Profs. Page and Schelbert under agenda item F.

The Society has received two requests for **financial assistance**. As you might remember at last year's Annual Meeting a grant of \$1,000 was approved to help finance the creation of a *Swiss Nationality Room* at the University of Pittsburgh. The Swiss Nationality Room Committee is asking again for additional funding. Remaining project costs are still estimated at \$250,000 little seems to have been disbursed so far. By last year about \$110,000 had been collected; by now the total has reached \$132,000. Given the magnitude of the remaining gap I am personally skeptical about the usefulness of a further SAHS contribution.

A second request was received from the family von Graffenried organizers of the 300 Year Celebrations of the founding of New Bern NC. Celebrations will start in 2009 in Switzerland with a large exhibition in Bern. That exhibition will move to New Bern in 2010. The family would much appreciate a support, even a symbolic one, from SAHS. In addition it has already been agreed that the June 2009 edition of the *SAHS Review* will be devoted entirely to this 300 Year Anniversary.

The usual number of **requests for help**, mostly on genealogical and related matters were received. My response has continued to be (i) buy Lewis Bunker Rohrbach's *Guide to Swiss Genealogical Research*; (ii) contact an expert such as Marylyn Wellauer; (iii) consult the Swiss Roots website.

A rather unusual case has been a request for help to decipher, translate, and do something with nearly a thousand letters and documents that – and I am not making this up – the great-great-grandson of the main letter writer / recipient had found recently in his great grandfather's barn and had put on a CD. However, since most of the papers are in French he had only the vaguest idea about their content. Actually they deal with the immigration of a farming family from the Canton of Valais to Michigan during the second half of the 18 hundreds. The Society editor had a first quick look at

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the papers to see what could be done; partial publication in book or article form is a possibility

It is proposed that a **Paroz prize** in the amount of \$1,000 be awarded to Ms. Marlene Groves of Picton Press in recognition of her untiring efforts on behalf of our Society. Her active engagement and very pleasant manner have helped much in making our Society a success.

Before closing let me share two other pieces of information with you:

1st As Fred Jenny will tell you in a moment, this summer he had organized a 2nd reunion of the Swiss Chapter of our Society in which both Ilse and I had the pleasure to participate. Held in Geneva at the beautiful headquarters of the Foundation for the History of the Swiss Abroad it was a great success; a striking testimony to the revitalization of the Swiss chapter.

2nd Last night the Board of Directors held another pre-Annual Meeting get-together, the third in a row. Hopefully, this will become an officially recognized tradition. Being dispersed throughout the entire US and Switzerland the evening before the Annual Meeting is the only time the officers can get together to discuss common issues and concerns.

In conclusion, let me thank my co-officers for their dedication and hard work. As usual, Rosa Schupbach has provided much help and advice, particularly on everything concerning New York. Jürg Siegenthaler's hard work has been mentioned; and this is true also for Dwight, Fred and GionMatthias. Ernie Thurston worked closely with Fred on establishing efficient procedures for handling membership issues across the Atlantic. Among non-officers, Leo Schelbert has continued to be a vital source of inspiration particularly concerning new projects the Society might become interested in.

C. Elections, Nominating Committee Report

By Rosa Schupbach, Chairperson

Rosa Schupbach, Chairperson of the Nominating Committee, announced that concerning the Board, only the office of Vice President (Switzerland) needed to be filled. Fred Jenny, who has been serving since October 2005 and is eligible for another 3 year term, agreed to be re-nominated. After motion he was re-elected unanimously.

A new Class of the Board of Advisors for 2008-2011 was elected unanimously consisting of four incumbents and Leo Schelbert replacing Lewis Rohrbach who did not want to be re-nominated. The members are:

Karl Niederer
Franz Portmann
Elsbeth Reimann
Leo Schelbert
Paula Sherman

Pro memoriam:

Class of 2006–2009: Susan Keller
H. Dwight Page
Simone Schoch
David Sutton
Franz von Arx

Class of 2007–2010: Margrit Ammann Durrer
Marianne Burkhard
Donald Hilty
Urs peter Schelbert
Donald G. Tritt

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D. Membership Report

To: Members of the Swiss American Historical Society
09/30/2008
From: Ernie Thurston, Membership Secretary
Subject: **Annual Membership Report**

IN BRIEF: We have 251 current members, a 2% increase over the 245 reported last year at this time. In addition we have already received 5 new memberships for 2009, which are not included in the totals below.

We welcome two new LIFE members this year, Dr. Konrad Basler (Switzerland) and Mr. Fred Gillespie USA, and want to thank Dr. Margot Ammann Durrer, Mr. Gerard Paroz, and Mr. Lewis Rohrbach for their generous contributions of \$1000 to \$2000 each, as well as 20 other members who donated from \$25 to \$150 more than their annual dues amount

At last years' annual meeting I was asked to gather e-mail addresses from our members. I am pleased to report that so far we have gotten addresses for 101 members, or 40% of our total membership.

CURRENT MEMBERS BY TYPE AND COUNTRY:

Membership Type	US/Canada	Switz./Other	Total
Regular (\$50/yr.)	120	30	150
Student (\$25/yr.)	0	0	0
Institution (\$75/yr.)	15	4	19
Life Members	40	6	46
Complimentary	28	8	36
	204	48	251

MEMBERSHIP CHANGES, 10/01/2007 to 09/30/2009

Members as of 10/01/2007	245
Plus: New Members Enrolled	21
Plus: Former Members (not "Current" last year) who have rejoined	0
Less: Dropped by Request or Decease	- 8
Less: Dropped for Non-Payment of Dues	- 4
Current Members, 09/30/2008	253

CURRENT MEMBERSHIP BY COUNTRY AND STATE:

AK	1	KY	1	NJ	5	VA	9
CA	18	LA	4	NV	2	VT	2
CO	1	MA	3	NY	25	WA	2
CT	1	MD	8	OH	10	WI	17
DC	6	ME	1	OR	2	WV	1
DE	3	MI	2	PA	9	BC, Canada .	1
FL	4	MN	7	RI	1	ON, Canada .	2
GA	1	MO	1	SC	4	QB, Canada .	1
HI	1	MS	1	SD	2	Switzerland	48
IA	2	MT	1	TN	4		
IL	22	NC	6	TX	3		
IN	3	NH	2	UT	2		

Comments by Heinz Bachmann:

Let me add a few words to the report submitted by Ernie so as to put his figures in perspective.

Compared to last year the situation has clearly improved; including the five already signed up 2009 members the membership drop of 10 during 2006/07 was been more than compensated. However, much of this improvement is due to favorable circumstances that are not likely to repeat themselves. Of the 26 new members at least 8 were Otto Wyss descendents. The huge success of that book is unlikely to repeat itself anytime soon. (By the way as a result of that success the Society now has four members in the little town of Paso Robles located in the middle of nowhere half way between San Francisco and Los Angeles. Are they going to stay once the novauté of one of their forefathers having been immortalized in a book has faded?) Another 9 were recruited in Switzerland the result of Fred Jenny's untiring efforts to find new members; that is likely to slow down sooner or later; Switzerland is just not that large a place. Only 10 of the new recruits came from the general public in the US. This is quite an improvement compared to the four who joined the year before but still is way too small to guarantee the Society's long term survival.

Hence, the urgent need to continue our efforts to recruit more members. As you may remember, the survey the Society conducted some years ago indicated clearly that by personal contacts are by far the most effective way of doing so. Nearly 60% of respondents mentioned that they were introduced to SAHS this way. Hence, again an urgent appeal to all of our members to **constantly be an active recruiter for our Society** in their daily contacts with family, friends, colleagues, acquaintances, and so on.

E. Treasurer's Report

By Heinz Bachmann, standing in for GionMatthias Schelbert

There are some good news and some bad news to report.

First the good news: so far the Society has suffered relatively little from the Wall Street calamities. By Sept. 30, losses had reached about \$6,400. This less than 8 % decline in the value of the Society's total assets is due largely to the decision made at the Oct. 2006 Annual Meeting, at the suggestion of our Treasurer, to move a substantial part of the Society's holdings out of stocks i.e. the Vanguard STAR Fund into more stable, fixed interest accounts. As a result, the share of STAR Fund holdings declined from virtually 100% of total assets until Oct. 2006, to under 55% by now and our exposure to Wall Street tribulations declined accordingly. In absolute terms, total net assets declined from about \$78,000 at the beginning of the year to about \$72,500 by now. In addition the Society's chapter in Switzerland holds nearly \$ 11,000 worth of SFr. in its postal checking account, as safe a placement as any in the world. About a third will be transferred to the US fairly soon to improve the Society's cash flow over here. Clearly, there is no immediate reason to panic.

Now the bad news: As of today we are not in a position to submit a detailed Profit and Loss Account for your approval. The first draft received a few days ago included some fairly large discrepancies that could not be reconciled on time. Fortunately they are of a harmless nature meaning there is no money missing – otherwise you would not see me standing here today calm and collect like this – to the contrary the Society seems to have more money in the kitty than the Profit and Loss account would suggest. Most likely there has been a double counting of a major expenditure item. Simply comparing the opening and closing statements of our banks, the Society most likely ran a small surplus of about \$800 in the US, excluding stock-exchange losses. The first draft as received showed a deficit of over \$7,000. Thanks to the very generous donation of nearly \$4,500 mentioned before, the chapter in Switzerland ran a surplus of about \$6,200; a bit over half was transferred to the US.

Final Accounts**Profit and Loss**

Income	
301 - Annual Dues	10,660.00
302 - Donations	5,734.55 */
307 - Life Memberships Paid	500.00
308 - Other Income (net)	155.75
309 - Interest Income	806.48
Total Income	17,856.78
Expense	
401 - Annual Meeting	663.52
402 - Donations Given	2,000.00
403 - Postage, Stationary, & Admin.	3,563.44
404 - Publications	5,586.25
407 - Other Expenses	2,000.00 */
408 - Honorariums	3,200.00
Total Expenditures	17,013.21
Vanguard Capital, Loss	6,384.07
Net Income	- 5,540.50

*/ excl. \$3,000 of contributions to the “Amish” book by a number of members handled by the Society on their behalf

Balance Sheet**CLOSING BALANCE (as of Oct.1, 2008)****Checking/Savings**

101 – First Bank & Trust of Evanston	
101.1 - Checking	1,389.84
101.2/3/4 - CDS 01/02/03	31,180.11
102 - Vanguard STAR Fund	39,702.67
Total Checking/Savings	72,272.62
105 – Pre-Paid Expenses	167.80
TOTAL ASSETS	72,440.42

OPENING BALANCE (as of Oct. 1, 2007) 77,980.92

NET CHANGE DURING FY 2007/2008 - 5, 540.50

Swiss-American Historical Society

PRELIMINARY ACCOUNTS 2007 / 2008

ASSETS (as of Oct. 1, 2008)

Checking/Savings

101 – First Bank & Trust of Evanston	
101.1 - Checking	1,389.84
101.2 - CD 01	10,028.79
101.3 - CD 02	10,643.86
101.4 - CD 03	10,507.46
Total	32,569.95
102 - Vanguard STAR Fund	39,702.67
Total Checking/Savings	72,272.62
105 – Pre-Paid Expenses	167.80
 TOTAL ASSETS	 72,440.42

PROFIT AND LOSS (10/1/2007 through 9/30/2008)

SUMMARY

Opening Balance, Oct. 1. 2007 (as published)	77,980.92
Profit and loss on current operations (calculated)	+ 843.57
Losses on investments (bank statement)	- 6,384.07
 Closing Balance, Sept. 30, 2008 (bank statement)	 72,440.42

Swiss Chapter, Financial Accounts 2007–2008

(In CHF)

INCOME AND EXPENDITURES

Income

- Membership dues (incl. one Life Membership)	3,090	
- Donations to cover administrative expenses	55	
- Surplus of Geneva meeting	38	
- Interest postal checking account	12	
- Reimbursement by SAHS US for distribution of 'Galatin' book	130	
- Total		3,325

Expenditures

- Administrative Expenditures	734
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Surplus (before transfers to US) **2,591**

Postfinance Account Closing Balance, October 1, 2008

Total Holdings **12,318**

Earmarked and Transitory Funds

- Pledge to SAHS U.S. USD 2,000	2,500	
- Balance of special grants by Swiss Chapter members for exclusive use in the interest of the Swiss Chapter	1,040	
- Advance payments of dues 2008–2009	200	
- Remainder of a donation to SAHS U.S. by a member of the Swiss Chapter	3,500	
- One Life membership paid in 2007–2008 to be transferred to SAHS U.S. in 2008–2009	600	
		- 7,840

Unencumbered Holdings **4,478**

F. Publications

By Profs. H. Dwight Page, Leo Schelbert

In the absence of Jürg Siegenthaler, Leo Schelbert proposes as the next planned publication a book on Arnold Guyot, the Neuchâtel born natural scientist and geographer, professor at Princeton for 30 years from 1855 onwards. It is being prepared by Professor Philip K. Wilson, a historian of science and medicine at Pennsylvania State University, specifically for publication by the SAHS. As the text is not likely to be ready for publication before the end of this FY this project has no implications on the 2008–2009 budget and is not included there.

H. Dwight Page reported that he is now working for Bryan College which is increasing its French Studies. French scholarships are available for deserving students. For future issues of the *SAHS Review* articles are planned about the battle of Morgarten and the South Carolina and New Orleans areas.

G. Swiss Chapter, Annual Report

By Fred Jenny, Vice President (Switzerland)

I am pleased to report that the Swiss Chapter is doing well. At the end of the SAHS year 2007–2008, it had 48 members – one more than a year ago – representing 20 percent of total SAHS membership. This Swiss Chapter membership consists of 6 Life members, 4 Institutional paying members, 30 Individual members and 8 Complimentary members. One Individual member decided to become a Life member, and one resigned effective September 30, 2008. All dues were paid during the SAHS year 2007–2008.

As during the previous SAHS year, I could again convince one American couple in the United States to join SAHS U.S.A.

With the one resignation just mentioned and three Individual members joining effective October 1, 2008, the Swiss Chapter starts the new year with 50 members. Efforts to gain more new members will continue.

15 Swiss Chapter members and three SAHS U.S.A. members – including President Heinz Bachmann and his wife Ilse – met on July 20, 2008 at the Musée de Penthes in Geneva. This Museum houses the Foundation of the History of the Swiss Abroad and is therefore particularly qualified to cooperate with our Society. Retired Swiss Ambassador Benedict de Tscharner gave the group an interesting tour through the history of the Museum and the Museum itself. We then had drinks and lunch plus a very good time. While the Musée de Penthes recently became a Complimentary institutional member, Ambassador de Tscharner just joined as an Individual member. 18 participants were still a modest group in numbers, but considerably more than eight participants in 2007 in Zurich. Of course I do hope that even more SAHS members will join this annual Swiss Chapter event next year.

Ambassador de Tscharner also edited the book ‘Albert Gallatin’ which you all received. The SAHS was instrumental in having it translated and printed in English. As a citizen of Geneva Albert Gallatin, probably the most famous Swiss in America, was very ably presented.

The next annual Swiss Chapter meeting will take place on Friday, July 24, 2009 in Zurich. I intend to invite again all SAHS members in the United States.

A certain cooperation continues with the Swiss American Society Bern. Just next week, on October 14, the Swiss Chapter members are invited to their 'Elections U.S.A.' event at the University of Bern.

My Annual Financial Report of the Swiss Chapter for the SAHS year 2007–2008 shows the following main results:

- Dues paid amounted to 3,090 Swiss francs, including the Life membership dues of one member who changed from Individual membership.
- Administrative expenses were of 734 Swiss francs.
- The annual Swiss Chapter event in Geneva ended with a small surplus.
- The Swiss Chapter supported SAHS U.S.A. with 3,000 dollars as budgeted. In addition, the Life membership fee of a new member was transferred to SAHS U.S.A. Another Life membership fee of a member who changed from Individual membership is also going to be made available to SAHS U.S.A.
- An outgoing long time member made a final donation of 5,000 Swiss francs to SAHS U.S.A. Nearly 1,400 dollars were used for SAHS U.S.A. payments in Switzerland, and approximately 3,000 dollars are still available to SAHS U.S.A.

For the year 2008–2009, I pledge a budget support of 2,000 dollars. This is less than during the two previous years when more money was available because of the retroactive payment of previous dues. The 'reserve' thus created is now exhausted. During 2008–2009, I expect an income of dues of about 2,400 Swiss francs and administrative expenses of approximately 700 Swiss francs. The remaining 1,700 Swiss francs do not fully cover my pledge. There is also the fact that I credit the full U.S. dues of Swiss Chapter members changing to Life Membership (so far 2 cases) and therefore 'lose' those annual dues. At present, 29 percent of the Swiss Chapter members are Life (12 %) and Complimentary (17 %) members who do not pay any dues to the Swiss Chapter.

I am also trying to keep the Swiss Chapter's finances in a healthy state so that we will never need money from SAHS U.S.A. I do hope that you agree with me on this point.

H. Long term outlook for SAHS Operations

By Heinz B. Bachmann, President

A quick background before starting the discussion: As I have alluded to before, the idea to discuss possible changes in the way our Society will operate in the future is largely an outgrowth of the frustration our publisher and SAHS member Lewis Rohrbach experienced in the course of preparing the *Amish in Indiana* book. That not only made him think about this particular book but more generally about the future of publishing historical/genealogical books and periodicals like ours. As you might know Picton is not only **our** publisher but also that of a number of other historical and genealogical societies in the US such as the National Genealogical Soc., the New England Historic Genealogical Soc., and the Soc. for the History of the Germans in Maryland. Hence, Mr. Rohrbach has a wide experience in this kind of business and what he observed over the last few years was not pretty: an increasing number of these societies experiencing serious financial difficulties; two were even forced to sell their headquarters. On the one hand membership stagnates or even declines and so does interest in conferences and library visits; on the other hand operating costs increase rapidly, particularly mailing and labour costs. As this squeeze worsened these societies had to sharply reduced services to their members: publishing programs have been cut; automatic free distributions of books have been discontinued; and more and more publications have been moved to the web, in line with an increasing shift in consumer preference from traditional paper/print to electronic means of communication. Based on these observations Mr. Rohrbach formulated seven proposals for possible policy changes that could reduce operating cost and help maintain the Society's long term financial viability in the present hostile environment. They are listed below:

Book publications

1. All books (Special Publications) are published exclusively on CDs; or
2. Special Publications continue to be published in book form (paperback) but are no longer automatically mailed out free to all members. To receive a copy, members would have to request it specifically; eliminating all those not interested in this particular book. Overseas members could be charged an extra \$5.00 to cover the sharply increased shipping costs.

3. Only one Special Publication published per year; except if an outside party is paying 125% of total cost; excess going into the Permanent Endowment Fund (see # 7 below).
4. Special Publications standardized in size and format, binding sizes and types; except if paid for entirely by an outside party (like Ammann Family Genealogy).

SAHS Review

5. *SAHS Review* published exclusively on an improved web site. No more *Reviews* printed. Might allow moving back to a quarterly schedule at much reduced cost.

Communications with members

6. All communications with members, including voting, conducted through the SAHS web site. No more mail contacts.

The above changes might result in a 5-10% drop in membership; however, the expected cost reductions might be worth the price.

Permanent Endowment Fund (PEF)

7. Establish a Permanent Endowment Fund that would gradually grow over the years.
 - all Life Membership contributions going into PEF
 - annual withdrawals limited to:
 - 50% of prior year's PEF net investment income
 - 50% of prior year's PEF capital gains, net of previous four years capital losses
 - 80% of excess contributions paid by an outside party for a Special Publication

As a lifelong bookworm I personally hope that our Society can survive without implementing the most far reaching of the above proposals. Among others, it has a radically different cost structure than these other large, long established societies, with no fixed costs and a minimum of administrative expenditures given our all-volunteer work force. Nevertheless, I fully agree with Mr. Rohrbach that we do need to start thinking seriously about the long term future whether we like it or not. Today's discussion should be seen as a first step in this decision making process.

As you know, a copy of the seven proposals was send-out for comments together with the Annual Meeting Invitations. Only 16 comments were received and only few of them addressed all of the seven points. They were

quite critical of the most radical proposals one and five (3 versus 10 and 6 versus 9 respectively) but fairly supportive or indifferent of most others.

As detailed in the “Minutes” after a long and agitated discussion no formal decisions were taken.

2009]

Meetings and Reports

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I. Proposed Budget for 2008–2009

By Heinz B. Bachmann, President

Income		
301 Annual Dues: US	7,000	
301 Switzerland	2,000	
302 Donations	1,000	
303 Annual Meeting Fees	600	
304 Book Sales	--	
306 Vanguard Capital Appreciation	- 2,000	
307 Life Membership Paid	500	
309 Interest Income	<u>700</u>	
Total Income		9,800
Expenses		
401 Annual Meeting 800		
402 Donations / Grants	2,000	
403 Postage, Stationary & Admin.	500	
404 Publication, <i>Review</i>	5,500	
404 Publication, books	5,000	
405 Legal & Professional Services	<u>1,200</u>	
Total Expenses		<u>15,000</u>
Net Result		- 5,200

Additional Notes:

Donations / Grants (402)	
Donation to New Bern 300 Year Celebrations	1,000
Paroz Award to Marlene Groves	1,000
Publication, books (404)	
<i>Amish of Berne, Indiana</i> , printing and distribution	5,000
Legal & Professional Services (405)	
includes membership drive; advertisements	

J. New Business

Rosa Schupbach reported briefly on her visit last June to Helvetia, West Virginia, a settlement established originally in 1869 by a group of Swiss immigrants. In his book, "One's Own Hearth is Like Gold, A History of Helvetia, West Virginia", published by the SAHS in 1990, David H. Sutton, a descendant of one of the early settlers and SAHS member, describes in great detail the immigrants' heroic struggles to establish a new life in the wilderness of the Appalachian mountains. A visit is highly recommended, interesting and instructive and visitors are very cordially received. There is also interest in receiving copies of the *SAHS Review*.

K. Next Annual Meeting, Adjournment

The next Annual Meeting is scheduled for **Saturday, October 10, 2009** in New York.