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## ANNUAL REPORTS of the SWISS AMERICAN HISTORICAL SOCIETY October 2020: Membership Report

Ernie Thurston

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Henry Wirz, the famous commandant of Andersonville Prison, during the Civil War. The entire project will be presented at the annual meeting of the SAHS in New York in October 2021 for approval.

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## **Membership Report**

*By Ernie Thurston*

To: Members of the Swiss American Historical Society  
 From: Ernie Thurston, Membership Secretary  
 Subject: Annual Membership Report

IN BRIEF: We have 209 current members, a 2% decrease from the 214 reported last year at this time.

### **CURRENT MEMBERS BY TYPE AND COUNTRY:**

<i>Membership Type</i>	<i>US/Canada</i>	<i>Switzerland/Other</i>	<i>Total</i>
Regular (\$50/yr.)	80	27	107
Student (\$25/yr.)	1	2	3
Institution (\$75/ yr.)	14	7	21
Life Members	43	7	50
Complimentary	<u>23</u>	<u>5</u>	<u>28</u>
	161	48	209

### **MEMBERSHIP CHANGES, 10/01/2019 to 9/30/2020**

Members as of 10/01/2019	214
Plus: New Members Enrolled	8
Plus: Former Members (not “Current” last year who have Rejoined	0
Less: Dropped by Request or Decease	- 6
Less: Dropped for Non-Payment of Dues	<u>-7</u>
Current Members, 09/30/2020	209

## BREAKDOWN OF CURRENT MEMBERSHIP BY COUNTRY AND STATE

CA .....	12	MT .....	2	AUSTRIA.....	1
CO.....	1	NC.....	2	BC, CANADA.....	1
CT.....	3	NJ.....	8	ONT, CANADA.....	1
DC.....	4	NV.....	1	GERMANY.....	1
DE.....	2	NY.....	17		
FL.....	3	OH.....	7		
GA.....	2	OR.....	1		
HI.....	1	PA.....	13		
IA.....	1	RI.....	1		
IL.....	15	SC.....	5		
IN.....	2	SD.....	2		
KS.....	1	TN.....	3		
KY.....	1	TX.....	3		
LA.....	2	UT.....	7		
MA.....	3	VA.....	4		
MD.....	6	VT.....	1		
MI.....	2	WA.....	1		
MN.....	3	WI.....	12		
MO.....	2	WV.....	1		
MS.....	1	WY.....	1		

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### Treasurer's Report

*By Frederic Behrens, Treasurer*

During June 2020, I was approached by various board members about helping with the finances of the Swiss American Historical Society. As an introduction, I am a 34 year old Swiss-American living in New York City. Since 2016, I have been the treasurer of the Swiss Center of North America in New Glarus, Wisconsin. My professional background is an attorney and international investment advisor. The previous treasurer, Heinz Bachmann, did a spectacular job of organizing and maintaining the finances of the Society. I look forward to

maintaining and building upon what he started.

I am pleased to report that the financial condition of the Society in 2020 is very strong. During the transition from Heinz to me, payments to our publisher Masthof Press continued to be made on a timely basis. Further, the long-term investment fund continues to perform strongly and the investment funds do not currently need to be used to support ongoing operations.

During 2021, my goal is to streamline the bank account and investment account for easier use. This may include moving the funds to another financial custodian in the name of the Society. I look forward to assisting other board members with the society's finances going forward and strengthening overall board governance matters.

### 1. Consolidated Accounts, 2019-2020

#### Income

Annual Dues (includes life memberships)	\$ 5,608.75
Transfer from Swiss Association Friends of SAHS	2,000.00
Capital Appreciation	<u>+ 8,799.03</u>
Total Income	\$ 16,407.78

#### Expenses

Meetings/Events	\$ 0.00
Administration/Postage Fees	281.55
SAHS Review (Masthof Press)	<u>+ 12,417.98</u>
Total Expenditures	\$ 12,699.53

<b>Net Budget Outcome</b>	<b>\$ 3,708.25</b>
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### 2. Balance Sheet

#### OPENING BALANCE, October 1, 2019

Checking (Byline Bank, Chicago)	\$ 18,696.13
Leo Schelbert Publication Award Fund (Byline Bank, Chicago)	10,000.00
Savings (Vanguard STAR Fund)	<u>+ 58,477.96</u>
Total Assets	\$ 87,174.09

#### CLOSING BALANCE, September 30, 2020

Checking (Byline Bank, Chicago)	\$ 13,557.10
Leo Schelbert Publication Award Fund (Byline Bank, Chicago)	10,000.00
Savings (Vanguard STAR Fund)*	<u>+ 67,276.99</u>
Total Assets	\$ 90,834.09

\* Note: estimates used when current statements not available.  
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**The Donald G. Tritt Endowment Fund  
in support of the Leo Schelbert Publication Award**

*By Frederic Behrens, Treasurer*

In 2019, Donald G. Tritt made a donation to the SAHS to be used for continuing research on Swiss-American topics. Below is the text of the letter accompanying his donation and suggested uses of the funds:

**The Donald G. Tritt Endowment Fund  
in support of the Leo Schelbert Publication Award**

In honor of Leo Schelbert.—preeminent Swiss American Scholar for his long service and leadership of the Swiss American Historical Society.

As an Endowment Fund, awards are to be made from earnings of the corpus. It is the wish of the donor this fund retain and increase its capital amount by prudent management. Awards may be given in some years and not in other years.

**Awards made for book-length projects**

- A. Assisting an author doing research on a Swiss American topic, or
- B. Contributing to publication costs of a study, or
- C. As recognition for an unusually significant publication.

**Awards made**

The recipient/s of this award is/are chosen by agreement of the following officers on a schedule of their determination: Immediate Past SAHS President, the Current SAHS President, Vice President, Treasurer, and Book Editor.

**Report of past Award recipients**

To demonstrate and support a central mission of the SAHS, it is the wish of the donor that yearly the accumulated record of all past recipients of this award be reported and published in the *SAHS Review*.