

Caswell County Historical Association

Projects and References (Revised March 29, 2020)



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1. Online/Museum Sales. Coordinate items listed for sale online and at the Museum. Prices should be the same. Are there more items we could offer for sale online? Appoint a board member (or small committee) to work with the webmaster. We must have a complete inventory, including how many of an item remains for sale. It appears that Jeff Nidle has assumed this responsibility.

It would be great if Jeff could work with Joyce Bustamante, Treasurer, to develop a means of inventory control. This will require educating Museum volunteers to properly document sales, have these sales transferred to the inventory control system, and coordinate this system with online sales. Attachment III is a list of book projects.

2. CCHA Newsletter "Lives and Times." Make the CCHA newsletter first-class and publish four issues annually (one each quarter: March; June; September; December). Provide compensation to members who paid for a newsletter in 2018/2019 but did not receive that to which they were entitled (such as an additional discount on items sold at the museum gift shop). Responsibility: Sandra Aldridge and Peter Berry (assisted by Webmaster Rick Frederick).

Note that Rick Frederick has offered to pay the difference between the 10% discount CCHA members automatically receive on Museum Gift Shop purchases and the 20% to partially reimburse those CCHA members who paid dues but did not receive a newsletter for 18 months.



3. Electronic Communication. Consider using a service such as Mailchimp or something as simple as "Undisclosed Recipients" to broadcast messages to those CCHA members with an email address. Webmaster Rick Frederick has taken on this project. See below. We used Mailchimp in the 2020 membership drive.



4. Caswell County Heritage Book. Research reprinting the Caswell County heritage book. It was deemed too expensive a few years back. Research this again. Look for a sponsor who would help finance the effort. Consider a pre-pay plan. Apply for a grant?

5. Reference and Research Materials. Catalog the research materials in the Sallie and Zeke Anderson Research Room (and elsewhere in the Museum). Publish online a card catalog. Karen Oestreicher should coordinate this.

6. Scanning Project. Initiate a multi-year scanning project to capture digitally the vast reference resources at the Museum and share these online. This will not be done overnight. The project will include all photographs owned by or loaned to the CCHA. The CCHA webmaster will help coordinate this project.

7. Membership Drive. Conduct a membership drive each January and each June. Use Mailchimp.

CCHA Membership Drive (January and July): Proposed Actions

- a) Mailchimp email solicitation of current members
- b) Mailchimp email solicitation of former members (not active in the current year)
- c) USPS mailing to current members and former members without an email address

- d) Newspaper Articles
- e) Newsletter item/attachment

- f) Facebook post
- g) Website post
- h) Museum open house/discount on Gift Shop items

Note: Critical to the success of the foregoing are accurate records of all membership years. For example, we must have a complete and accurate membership list for 2018, 2019, and 2020. Karen Oestreicher, Joyce Bustamante, and Joyce Miller are responsible for this. Webmaster Rick Frederick will handle uploading the corrected address lists to Mailchimp.

8. Oral Histories Project. Status of Caswell County oral histories project? Publish/share those oral histories already recorded. Continue the project, which was launched in October 1980.

9. KKK Papers. What happened to the Katharine Kerr Kendall papers donated to the CCHA in 2005?

10. Mary McAden Satterfield. Were the Mary McAden Satterfield files donated to the CCHA or to the Gunn Memorial Library? Have they been catalogued/scanned? Are they part of the CCHA materials in the Southern Historical Collection at UNC?

11. Donations and Bequests. Does the CCHA have a formal program for donations and bequests? Review relevant policies and procedures. Cy Vernon and Lee Farmer should be involved.

12. Hamer Store Ledger. What was done with it while on loan from Billy Burton? Cy Vernon?

13. Email Addresses Needed

Here is a draft letter that should be sent to CCHA members (and former members) without an email address on file:

Dear _____:

The Caswell County Historical Association is considering communicating with its members using email addresses. Please share the email address you would like us to use. Email addresses will always remain secure and never shared with others. Of course, the CCHA newsletter will continue to be sent to you by regular US mail as that is your choice.

This will allow us to share Caswell County information between newsletters.
Please send your email address to CCHA Webmaster Rick Frederick at: rick@ncccha.org

Thanks, and best regards,

Jim Hilton
President
Caswell County Historical Association

We do not have an email address for the following to whom a letter should be sent. Thus, they were not included in the 2020 membership drive.

Blackwell, Mrs. J. Y.
Case, Susan {FB message sent]
Cheek, Jimmy and Pat
Cherry, Nancy P.
Duke, Phillip W.

Edwards, Robert A.
Farrish, Rese
Graham, Tommy and Celinda
Hendricks, Jean Vaughn
Johnston, Richard

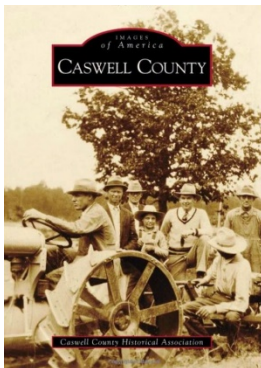
Kellam, Jacquelin (DeDe)
Kracke, Judith Pointer
Liggins, Doris Graves

Long, Catherine
Mangum, Nancy P.

Parham, Irene
Phillips, Theodore B.
Rudd, Nancy M.
Smith, Jr., Earl
Somers, Donald

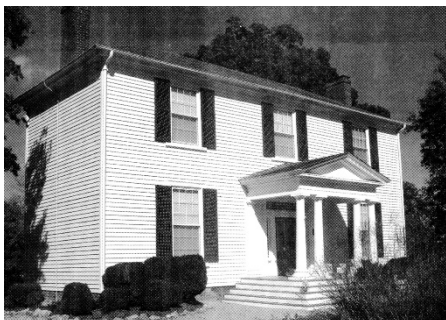
Spillman, Dr. Scott and Dr. Lauren
Tate, Freda
Totten, Denny
Wilson Historical Society
Woodson, Mr. & Mrs. Lewis S.

Go through the CCHA files to identify others to whom the above letter should be sent.



14. Royalty Payments. Who monitors royalty payments from Arcadia Publishing on "Images of America - Caswell County" book sales? Treasurer Joyce Bustamante?

15. NC Sales Tax. Who tracks, calculates, and pays the NC sales tax on retail sales by the CCHA? Lee Farmer? Treasurer Joyce Bustamante?



16. Woodside Materials. What has been done with the "Woodside" materials Lib McPherson donated to the CCHA? She asked about this a few months before her death.

17. Old School Slides. Mel Battle informed the CCHA that it should "Check old school slides at school board office." This could be a treasure trove of images and information. What is being done?



18. Grasty Diary. John Sharsall Grasty (1825-1883) diary. Have missing pages been obtained from the NC Archives and the entire diary scanned for placement online? Anyone in charge of this project? This was dear to the heart of past CCHA President Millard Quentin Plumblee (1839-1987).

19. Mailchimp. Develop and use this service for regular contact with CCHA members. Webmaster Rick Frederick is leading this effort but could use help and backup. See above.

20. CCHA Membership Benefits (shown here for reference)

- (a) Newsletter "Lives and Times" published quarterly (four issues/year)
- (b) Monthly E-Newsletter *Caswell Matters*
- (c) Free Museum admission
- (d) 10% off price of items sold at Museum
- (e) One hour free research
- (f) \$15 (instead of \$25) for additional fixed-fee research
- (g) 10% off additional hourly-rate research
- (h) Access to the Members-Only Area of the CCHA website

21. Membership Date. For new members, determine a date certain within a calendar when a dues payment would be with respect to the following year. I suggest September 30, but that new members after that date (through December 31) receive the fourth quarter newsletter as a courtesy. Cy Vernon should take the lead on this as it involves policies and procedures.

22. Organizational Documents. Ask Lee Farmer to review the CCHA articles of incorporation/organization and bylaws. When was this last done? Do these documents remain consistent with the latest §501(c)(3) requirements? Do they reflect the way the CCHA is being operated? Do not risk the tax-exempt status.

This brings into question the CCHA Board appointing members of the board. Presumably, only the members at the annual meeting have authority to elect board members.

According to the documents on file with the North Carolina Secretary of State, the Caswell County Historical Association, Inc., was created March 29, 1971, as a non-profit corporation (#0682355). As of the date of this message it remains active. However, the registered agent on file with the North Carolina Secretary of State is W. Will Woodard. Walker Willard Woodard died in 2013. Currently, North Carolina nonprofit corporations do not file an annual report with the North Carolina Secretary of State but are required to maintain a registered agent located within the state. The CCHA is not in compliance.

Legal Name: Caswell County Historical Association, Inc.

Information

SosId: 0024747

Status: Current-Active
Annual Report Status: Not Applicable
Citizenship: Domestic
Date Formed: 3/29/1971
Registered Agent: Woodard, W Will

Document ID: 000158392
Filing Date: 3/29/1971
Filing Type: Creation Filing
Document Type: Articles of Incorporation

Addresses

Mailing

144 Court Square PO Box 278
Yanceyville, NC 27379

Reg Office

144 Court Square PO Box 278
Yanceyville, NC 27379

Reg Mailing

2011 Us Hwy 158w
Yanceyville, NC 27379

Document ID: 952130372
Filing Date: 8/1/1995
Filing Type: Amendment
Document Type: Change of Address of Registered Office/Agent

Document ID: 991345102
Filing Date: 5/14/1999
Filing Type: Amendment
Document Type: Articles of Amendment

Registered Agent: W. Will Woodard (2011 Us Hwy 158w Yanceyville, NC 27379)
See the email set forth below that was sent to all CCHA Board members and legal counsel Lee Farmer.



23. Museum Open. What are the days/hours of operation for the Richmond-Miles History Museum? We need to make sure these are correct in the newsletter and online. Who is in charge of this? Who oversees museum docents/volunteers?

24. First Families of Caswell County. Consider a "First Families of Caswell County" program (FFOCC). The purpose of this organization would be:

- (a) to honor the pioneer ancestors who were the founding families of Caswell County;
- (b) to identify and recognize the descendants of these families; and
- (c) to promote research into the genealogical, cultural, and social history of Caswell County.

Any person who could prove descent from a qualifying ancestor could apply for membership. Qualifying ancestors would be any person who can be proven to have been in Caswell County at any time between the formation of the county in 1777 and December 31, 1800. This would include, but not be limited to:

Any Person --

Listed on the 1800 United States Federal Census for Caswell County
Listed on the 1790 United States Federal Census covering Caswell County
Listed in the Caswell County court records 1777-1800
Listed on the original petition for the formation of Caswell County (from Orange County)

A membership form would be developed that must be accompanied by supporting documentation and a \$35 application fee. We should aim to make at least \$15 per application on this project. Jim Hilton should designate a person responsible for the FFOCC project.

Both primary and secondary records would be accepted to prove a line of descent from a qualifying ancestor.

A successful applicant would receive a certificate suitable for framing.

25. CCHA Presidents. List all CCHA Presidents and their term in office and consider a short biography. Is this list complete? See the proposed "In Memoria" section of the CCHA e-newsletter.

Anne Yancey (Annie) Gwynn (1891-1985)
Carolyn McLin Moore Upchurch Thomas (1915-2006)
Mary Yarbrough McAden Satterfield (1911-2003)

James Ezekiel Anderson (1914-2005) (elected but could not serve)
Mrs. Arthur Smith (not further identified)

Stephen Edward (Steve) Walker (1923-2004)
John Burch Blaylock (1909-1995)
Mary Skipwith Brown (1905-1995)
Mary Yarbrough McAden Satterfield (1911-2003) (served six months)
Sallie Banks Newman (1893-1993)

Millard Quentin Plumblee (1906-1987)

Florence Anne Taylor Daniel

James L. Ray, Jr. (not further identified; but apparently President on May 12, 1999)

Elizabeth Pierce Parker McPherson (1920-2019)

Karen Duzan Oestreicher

Sallie Gibson Smith

James C. (Jim) Hilton, Jr.

26. Board of Directors (listed for various uses)

Aldridge, Sandra (Newsletter Editor)

skippyhgb@gmail.com

Berry, Peter (Assisting with Newsletter)

PeterBerry@happyendingspublications.com

Bustamante, Joyce (Treasurer)

smc_jbustamante@yahoo.com)

Hilton, Jim (President)

papdog65@hotmail.com)

Hodges, Amanda (Fund Raising/Grants)

amandac.hodges@yahoo.com

Miller, Joyce (Secretary/Membership)

joycernc@earthlink.net

Nidle, Jeffrey (Museum Maintenance/Photographer)

arabella@esinc.net

Oestreicher, Karen (Research Coordinator)

karen@ncccha.org

Oestreicher, Steve

oestreicher@embarqmail.com

Tate, Donald

don.tate1@yahoo.com

Vernon, Cyrus (Vice President/Policies and Procedures)

cy@centuryfarmorchards.com

Without Karen Williamson and Nate Hall, the CCHA board of directors is again all-white. This is a mistake. How did we lose Karen Williamson?

Is Lee Farmer a board member? He is shown in some CCHA lists as an ex-officio officer, but is he a properly elected board member? An ex-officio member of the CCHA Board of Directors would be a member thereof by virtue of holding another office. What is this other office?

27. Membership Dues Discount. Consider a discount in CCHA membership dues for those who renew before June 30 of the current membership year. How much to discount? This depends in part on the interest rate the CCHA realizes on its bank account. Another aspect to consider is locking in a member for another 18 months. Does the CCHA have a board member with the appropriate business acumen to take on this project? Peter Berry? This would be coordinated with the mid-year museum open house. This obviously needs more thought.

28. DNA Project. Launch/sponsor a DNA genealogical research project for Caswell County. Coordinate this with the Caswell County Genealogy online database:
<https://caswellcountync.org/genealogy/index.php>

29. CCHA Relationships

What is the relationship the CCHA has with the following?

- (a) Caswell County Board of Commissioners
- (b) Yanceyville Mayor and Town Council
- (c) The Caswell Messenger/Danville Bee-Register/Burlington Times-News
- (d) Bartlett Yancey High School
- (e) Piedmont Community College

- (f) DIG genealogical program
- (g) Milton Renaissance Foundation (Angela Daniel-Upchurch)
- (h) Thomas Day House
- (i) Caswell History Speaks
- (j) African American Historical and Genealogical Society

- (k) Caswell County Chamber of Commerce
- (l) Gunn Memorial Public Library
- (m) Historical/Genealogical Associations/Societies in neighboring counties/state

30. Public Relations. Does the CCHA have a board member/officer responsible for public relations? Amanda Hodges seems more than qualified to assume these responsibilities.

31. FAQS. Should the CCHA develop a list of FAQs (frequently asked questions) to post on its website and/or share elsewhere?

32. Mission Statement. Does the CCHA have an updated mission statement?

33. Long-Range Plan. Does the CCHA have a ten-year plan? What are our goals? Where do we see the CCHA in 2030? How do we plan to achieve the goals? One goal should be 300 members by the end of 2021.

34. Credit Card. Consider a method that would allow customers at the Museum Gift Shop to use a credit card. Appoint a board member to research this and implement as appropriate. This really is easy. Look at:

<https://squareup.com/us/en/point-of-sale>

35. Succession Plan. Develop a succession plan for various CCHA functions. This includes a central secure repository for critical CCHA information/account credentials/passwords, website files, etc. The goal is to secure in appropriate files (hard and electronic) the institutional history required for the continued successful operation of the CCHA as people come and go. Here is a partial list:

- (a) Fidelity Bank account information, passwords, etc.
- (b) Copyright authorization file
- (c) PayPal account information
- (d) Website files and account information
- (e) Membership Lists (for at least five years)

- (f) Organizational Documents
- (g) Tax Records
- (i) Non-Profit Filings/Records

36. Business Model. Consider running the CCHA as a business and not as a club. Develop a plan. See above.

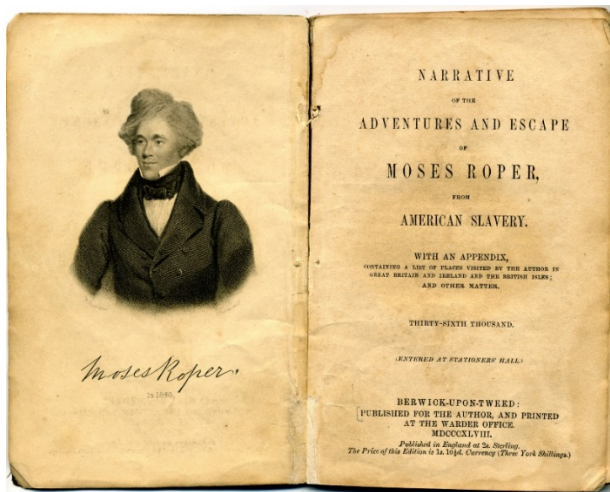
37. Annual Awards. Consider annual awards for those who have contributed the most in a calendar year to our knowledge of Caswell County history and the genealogy of its people. This would encompass written materials (articles, books) and other recognizable efforts. Included would be a President's award, and others.

38. In Memoria. On the website we could remember our volunteers, members, friends and supporters as they start their next journey.

39. Museum Organizational. No one seems to know the days and hours the Museum is open to the public. Can anyone help? We need this for the CCHA Website and its Facebook Page. Also, CCHA members deserve to know. See #23 above.

Does the CCHA have adequate insurance for the Museum building and its contents? Please share with the CCHA Board, the CCHA Legal Counsel, and the CCHA Webmaster any insurance policy. Is there a separate reserve for the Museum? If so, what is the status of this reserve? How much? How funded? Where invested? Is there an annual inspection of the physical condition of the Museum (roof, plumbing, etc.)?

Is there a plan in place to conserve Museum contents in the event of a catastrophe? How was the Museum purchased? Was the money donated to the CCHA, and the CCHA made the purchase? Or was the Museum purchased and deeded to the CCHA with restrictions?



40. Historical Markers. Consider filing an application with the NC Department of Natural and Cultural Resources for a historical marker commemorating the life of Moses Roper (c.1815-1891). Roper was born a slave in the Semora community of Caswell County, NC. He escaped, fled to England, and wrote a book about his life.

See: <https://caswellcountync.org/genealogy/getperson.php?personID=I16066&tree=tree1>

One day it may be appropriate sponsor a historical marker outside the Richmond-Miles History Museum, however one would not be considered until 2029 when Maud Gatewood would have been dead twenty-five years.

41. Privacy Guidelines. Develop written privacy guidelines covering information submitted by donors and members. This should include how email addresses are stored and used, how information collected online with respect to sales is stored and used, etc. Perhaps we could review similar guidelines used by similar non-profit organizations. The CCHA guidelines would be made part of its website and referenced annually in the CCHA newsletter.

42. Donor Recognition. Consider a list or some other means of recognizing donors, with consent of course.



43. PayPal Non-Profit Program. Explore with PayPal its revised program for tax-exempt non-profit organizations such as the CCHA. Webmaster Rick Frederick will undertake this effort. Status: Completed. The CCHA is paying 2.2% + \$0.30 per transaction, which is the reduced fee for non-profit corporations.

44. 10% Online Discount. Develop a method for CCHA members to receive on online merchandise purchases the same 10% discount they receive on Museum Gift Shop purchases. The CCHA webmaster will explore this. Unfortunately, there is no easy way to do this. It may require knowing exactly the 2020 CCHA membership, alerting the membership to include a comment in the online purchase (which is allowed) alerting the CCHA that the purchase is by a current member, and the CCHA treasurer or webmaster issued a refund equal to 10% of the basic purchase price (not on shipping and tax). This will be cumbersome, but effective.

45. CCHA Banking. Consider whether The Fidelity Bank is the best place for CCHA funds. Is the account interest-bearing? What are the options? Would another bank better serve the CCHA? See #49 below with respect to a shorter payee name.



46. Tobacco and Slave Ledger. What is the status of the 1840s Tobacco and Slave Ledger Preservation Project launched in 2008?

Answer: The CCHA was unable to raise the \$22,000 necessary to purchase the ledger. Due to the generosity of Karen Avants the ledger resides at the Wilson Round Library on the campus of the University of North Carolina. And, Karen provided a copy that can be viewed at the Richmond-Miles History Museum in Yanceyville.

The first part of the ledger concerns the prizing, buying and selling of tobacco from Caswell County plantations. Important facts such as person selling tobacco, the type and condition of the crop, and location sold are recorded. It is also noted how the tobacco is transported to market. The tobacco was prized into hogsheads.

The second part of the ledger is a rare and important record of the North Carolina, Virginia and South Carolina slave trade during the 1840's. Expansion of the cotton kingdom during the 1830's greatly increased the demand for slave labor in Alabama, Louisiana and Mississippi. The need for slave labor began to decline in the old tobacco belt region of the upper south. Many enslaved people were "sold south" as a result of debt and estate settlements and economic conditions.



47. Southern Historical Collection. Part of the CCHA's collection was transferred to the Southern Historical Collection at UNC in August 2008 and January 2009 (14.0 feet of linear shelf space, around 3,500 items). Should additional materials be added – such as CCHA newsletters published since January 2009?

Do we adequately “advertise” the existence of this collection and explain how it can be used?

Here is the formal name: Caswell County Historical Association Collection #5401, Southern Historical Collection, The Wilson Library, University of North Carolina at Chapel Hill

To see what is in this collection go to: <https://finding-aids.lib.unc.edu/05401/>

Also note that there are more Caswell County materials included in the Southern Historical Collection (in addition to those donated by the CCHA). Here is a sampling. The CCHA webmaster will prepare a complete list for publication/sharing online with CCHA members and others. See Attachment II (which due to its length will be included in a separate document):

https://ncccha.org/pdf/cchaorganizational/attachmentii_cchatodolist.pdf

48. Personalize Messages. Consider a personal message to each member from the CCHA President. We have information in the archives about most members. What a great marketing tool – and the right thing to do.

49. Fidelity Bank. Make formal arrangements with Fidelity Bank to allow checks to be made payable to CCHA. Now checks must be made payable to Caswell County Historical Association, which is much too long. Treasurer Joyce Bustamante should handle this.

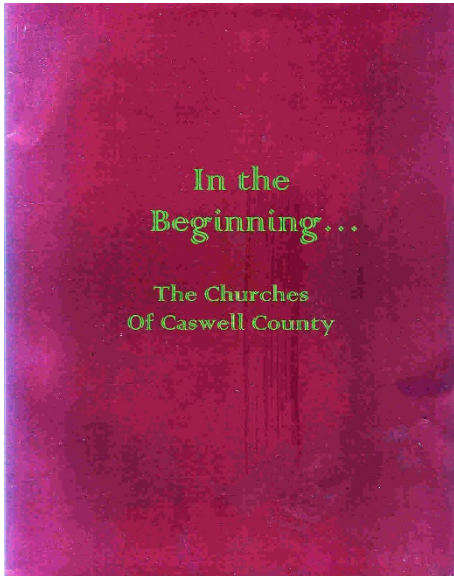
50. Museum Volunteer Handbook. Review and revise as necessary the handbook that is used by volunteers at the Richmond-Miles History Museum. It appears out-of-date (including book prices).

51. The Caswell Messenger Microfilm Project. In 1966 the CCHA apparently completed a project that microfilmed all editions of *The Caswell Messenger*. Is this microfilm available? Where? Has the project been extended to cover the years after 1966?

52. CCHA Board of Directors Meeting Minutes. There should be CCHA Board of Directors meeting minutes going back to 1956. These could be a treasure trove of not only CCHA history, but of Caswell County generally. The minutes should be assembled, organized, scanned, and shared.

Going forward, beginning with the January 2020 CCHA Board of Directors meeting, meeting minutes, appropriately edited, should be shared with CCHA members. After all, the CCHA Board

represents the members. These minutes easily can be distributed to current CCHA members using the Mailchimp served developed by the CCHA webmaster.



53. The Churches of Caswell County. In or around 2000 Jean Bradsher Scott edited and had published *In the Beginning* . . . *The Churches of Caswell County*. Not all churches participated, and much has happened since 2000. The CCHA should consider a revision of/supplement to Jean Scott's work. Many of the churches that did not participate in 2000 were black. This would be a great way for the CCHA to shed its whiteness, actually contact black church leaders, and produce a quality Caswell County church history.

54. Museum Director. Hire a full-time director for the Richmond-Miles History Museum. This would solve the problem of occasional volunteers and bring the operation of the Museum into the 21st century. Use grants and special funding to pay the salary, say \$12,000 annually.

I propose engaging someone to serve full-time as Director of the Richmond-Miles History Museum in Yanceyville. This could be a retired person with the appropriate skills.

The Museum would be open six hours Monday through Saturday: 10-4. For these 36 hours the Director, as an independent contractor, would be paid \$12,000 annually. Of course, this could be adjusted up depending upon the skill set of the person hired and the funds available. A retired historian or librarian with computer skills would be great.

The Director would:

1. Conduct tours of the Museum -- acting as a docent
2. Operate the Gift Shop/Book Store
3. Catalogue the contents of the Anderson Research Room
4. Scan for placing online the vast array of materials housed at the Museum
5. Prepare a bibliography of Caswell County research materials

6. Provide an article for the quarterly CCHA newsletter.
7. Answer the telephone
8. Field email questions (and provide answers). I would issue the Director the appropriate email address, such as: museum@ncccha.org.
9. Manage the inventory of items the CCHA sells at the Museum and online
10. Explore reprinting the Caswell County Heritage book

11. Coordinate the CCHA oral histories project
12. Administer the "First Families of Caswell County" project

13. Work closely with Karen Oestreicher in providing paid research. See:

<https://ncccha.org/researchservice/researchservice.html>

The Director would not be a CCHA Board member. The person would not be an employee. The Director would be an independent contractor providing services to the CCHA. At the end of the year the CCHA would issue a Form 1099. There would be no tax withholding or other tax responsibilities. Joyce Bustamante and Lee Farmer would handle the details.

Volunteers would continue to assist. And, the CCHA President would be responsible for "private" Museum tours -- for which there should be a charge (except for CCHA members).

How would this be funded?

1. Grants. Amanda Hodges is asked to work on this.
 2. Donations. Ask members to adopt a month or half month. For example, I would pay \$1,000 for July.
 3. General Funds.
 4. Ask the Town of Yanceyville and the County Commissioners to help. Yes, I know -- good luck.
 5. Monetize the treasure trove that sits at the Museum and what webmaster Rick Frederick has created online. Example: Working with Jeff Nidle and Joyce Bustamante we hope to have book sales organized and generating additional revenue. We miss so many revenue opportunities -- and I have provided so many ideas in this regard.
-

I know that Caswell County is poor. I know that the CCHA and the Museum barely hangs on. I know that Yanceyville has through building demolition almost created a ghost town. I know. But, are these reasons to roll over and die? I think not.

I also realize that my communications may seem blunt. However, please take them in spirit they are offered: with love and respect for old Caswell County.

Your efforts on behalf of the CCHA are recognized and appreciated by me every day.

Best personal regards,

Rick Frederick
Webmaster (from time to time)
Caswell County Historical Association

PS Yes, this has been added to the CCHA projects list:

<https://ncccha.org/pdf/cchaorganizational/cchatodolist2020.pdf>

55. CCHA Donations/Membership Tax Deductibility. How do we describe or not the deductibility of CCHA donations and membership dues? As there should be some value ascribed to the newsletter and to the 10% discount on Museum Gift Shop purchases, a \$25 annual membership payment would not be fully deductible. However, the CCHA should not provide legal advice, while still taking advantage of its non-profit status. Language should be developed by Lee Farmer and Joyce Bustamante.

56. Consider Taking the CCHA Public. Why? How much could be raised? What are the corporate and tax implications? Who would invest? Why would they? Personal note: If shares were offered at \$100, I would purchase 200. This alone would generate \$2,000. I realize this may be impractical, but included it here for completeness.

57. African American Heritage Trail.

58. Surname Project

59. BYHS Yearbook Advertisement

60. Library Program. Conduct a genealogy/history program at the Gunn Memorial Public Library in Yanceyville, NC. Coordinate this with Karen Williamson and DIG.

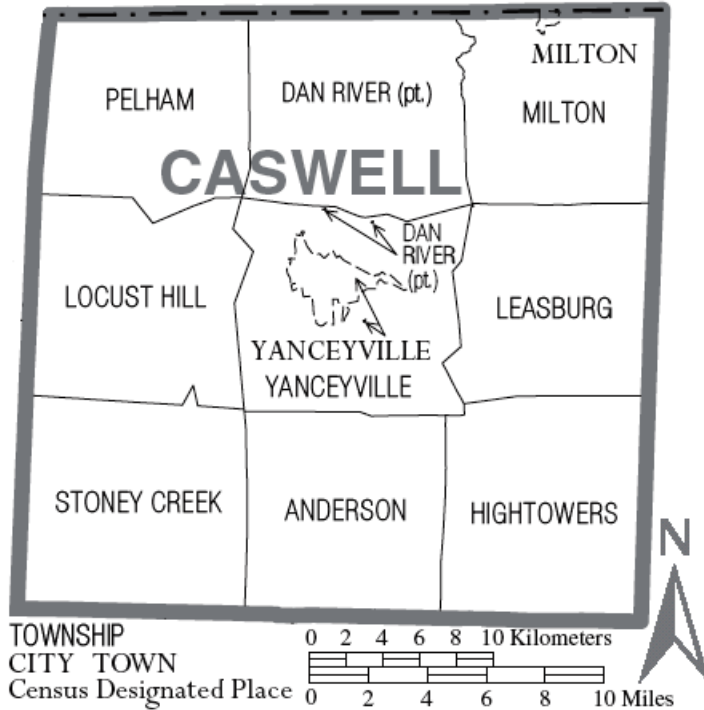
61. Intern Program. Invite local high school students to assist Museum docents/volunteers, to assist with the many projects listed herein. Idea attributed to Jeff Nidle.

62. Membership Forms. The CCHA promotes membership at several places: at the Museum; online at the website; and through individual solicitations. We should coordinate these approaches to make sure they are consistent. For example, the CCHA webmaster should be provided a copy of the membership application form handed out at the Museum to make sure it shows the current benefits of CCHA membership and has the correct information to pay dues online. This is very important.

63. Museum Computer. Replace the computer at the Richmond-Miles History Museum. Steve Oestreicher oversees this project. Note that the \$500 donation from Dr. Cynthia Forde should cover most of this expense.

64. Sell Advertising in Newsletters. Consider selling advertising in CCHA newsletters. Who are potential advertising customers: *The Caswell Messenger*; auction houses; funeral homes; restoration companies; Caswell Chamber of Commerce; publishers (such as Arcadia); banks?

Of course, this must be reviewed by legal counsel Lee Farmer to make sure such activity would not jeopardize the CCHA's §501(c)(3) nonprofit status.



65. Add Tour of Caswell's Townships to Newsletter. Caswell County has nine townships. See the attached map. This newsletter segment would begin in the northwest corner (Pelham Township), then proceed sequentially east and south. Develop material relevant to each township. This would not be difficult and would expand our focus beyond the history of Yanceyville and Milton. Properly promoted on the CCHA Facebook page and elsewhere, this could attract new members. We have a wealth of material for all nine

townships (including at the Museum).

66. Museum Visitor Sign-In. Revise the Museum visitor sign-in book to add a column for email addresses. We would use the collected email addresses to solicit CCHA membership.

67. Church Questionnaires. In connection with *When the Past Refused to Die* the CCHA sent a questionnaire to all Caswell County churches. Not all replied. However, this file should be located, and the information provided assembled in a form suitable for sharing online.

68. Virtual Museum Tour. Approach this project in two phases. The first would be an essay on an exhibit/room at the Museum. The images would predominate, but with explanatory text. This could be done quickly and inexpensively. A series of these essays would be shared with members.

The second phase is more ambitious and would involve a video guided tour of some aspect of the Museum. It would be better to focus on a particular exhibit/room rather than just walking through the entire Museum with a video camera.

Attachment I

The following is with respect to Item #22 above:

On December 30, 2019, the following was sent to all CCHA Board members and to legal counsel Lee Farmer

Dear Jim and Joyce:

Nonprofits are held to a high standard of government scrutiny. And that is for good reason! §501(c)(3) nonprofits are exempt from federal income tax, access public funds, and provide donors with a tax deduction on their contributions.

According to the documents on file with the North Carolina Secretary of State, the Caswell County Historical Association, Inc., was created March 29, 1971, as a non-profit corporation (#0682355). As of the date of this message it remains active. However, the registered agent on file with the North Carolina Secretary of State is W. Will Woodard. Walker Willard Woodard died in 2013.

Currently, North Carolina nonprofit corporations do not file an annual report with the North Carolina Secretary of State but are required to maintain a registered agent located within the state. Here are the instructions:

"If you have a corporate registered agent, be sure to renew the service and update any contact information that may have changed. If you use an individual, make sure they are aware of the duties of a registered agent, and if they have moved addresses, file to update the state's records."

I suggest that legal counsel Lee Farmer be the CCHA registered agent. Lee can explain to you the function of a registered agent.

Also, what about the North Carolina charitable solicitation license?

Who files IRS Form 990? Is it current? The filing date is May 15 after the end of the fiscal year for the CCHA (same as the calendar year). Is this shared with Board members, who may have legal liability for its accuracy.

I am very concerned about the non-profit status of the CCHA and suggest that the board along with legal counsel Lee Farmer undertake a review of all CCHA organizational documents and policies/procedures.

I have expressed over the years the concerns I have with the board appointing its own members.

Joyce Miller, as CCHA Secretary, I am asking you to circulate before the next CCHA Board meeting to all board members, to legal counsel, and to the CCHA webmaster (who represents the CCHA online) the current versions of the CCHA articles of association/organization and bylaws.

Jim, as CCHA President, I encourage you to take charge of this matter. I ask not only as a the CCHA Webmaster, but as a current member of the CCHA. It is the members you represent, and this member is concerned.

Best regards,

Rick Frederick
Member and Webmaster
Caswell County Historical Association

Attachment II

Caswell County Items: Southern Historical Collection

Due to the length of this attachment it is not included here

To see the full attachment, go to:

https://ncccha.org/pdf/cchaorganizational/attachmentii_cchatodolist.pdf

Attachment III

Books

Sold by CCHA



1. *Milton Memories*. 2014 book by Jean Bradsher Scott

Should be Sold by CCHA

Attachment IV

CCHA Online Presence

CCHA Main Website

<https://ncccha.org/index.html>

Caswell County Genealogy

<https://caswellcountync.org/genealogy/>

CCHA Photograph Collection

<https://www.flickr.com/photos/ncccha/>

CCHA Weblog

<https://ncccha.blogspot.com/>

CCHA Facebook Page

<https://www.facebook.com/CaswellCountyHistoricalAssociation/>

The CCHA also is a major contributor to the following:

Cemetery Census

<https://cemeterycensus.com/nc/casw/index.htm>

Caswell County on Find A Grave

https://www.findagrave.com/cemetery/search?name=&locationId=county_1667

Attachment V

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- 41. Privacy Guidelines for Donors and Members
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10. Mary McAden Satterfield Files
12. Hamer Store Ledger
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18. Grasty Diary

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