

# R *THE SONS OF NORWAY VIKING* RESOURCE

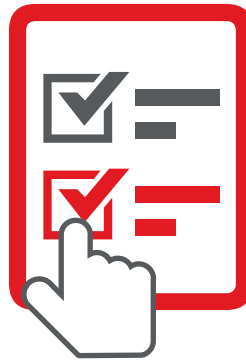
Attention All Officers

## New and Improved Lodge Achievement Program

Sons of Norway Headquarters has been working with the district presidents to improve and simplify the 50-year-old Lodge Achievement form.

### Here are some of the changes:

- The form itself has been completely rewritten. Questions, answered with either a “Yes” or “No,” are organized into three sections: Fraternal (Promotion and Recruitment, Member Experience and Administration), Financial and Foundation. The highest score possible is 100 points.
- Lodge secretaries will be submitting their completed forms **DIRECTLY** to Sons of Norway Headquarters, **NOT** to their Zone Directors.
- The American Fraternal Alliance (AFA) Year-End form, which used to be page 2 of the Lodge Achievement form, is now a completely separate document. Lodges who have recorded their 2016 activities online at [FraternalGive.org](http://FraternalGive.org) do NOT need to complete an AFA Year-End form.
- On the AFA Year-End form, lodges no longer need to enter the amount of money they spent on fraternal and community activities. This information will be collected later from the D17 Financial Statement.
- The new due date to submit all documents to Sons of Norway Headquarters is 02/01/2017.



## ATTENTION ALL OFFICERS

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Attention All Officers

# New and Improved Lodge Achievement Program

## Here are some features that are staying the same:

- The Family Lodge of the Year form and Lodge Achievement forms are mailed together.
- Lodges will be awarded Gold, Silver and Bronze Merit Award certificates based on their scores.
- Lodges are still divided into two tiers: large and small.
- Lodges must complete an AFA Year-End form **OR** record their activities using FraternalGive.org to qualify for awards.
- The most outstanding lodges will be named District Lodges of the Year and International Lodges of the Year.
- All awards will be announced during the 2018 District and International Conventions.

The 2016 Lodge Achievement form is available on the members area of [www.sonsofnorway.com](http://www.sonsofnorway.com). Lodges can choose to download a PDF or submit their answers using the online questionnaire. The AFA Year-End form and the Family Lodge of the Year form are also available as PDFs online.

## Questions?

## Need additional information?

Please contact **Sherry Gorse** at **Membership Services: (800) 945-8851 ext. 643, [fraternal@sofn.com](mailto:fraternal@sofn.com)**.

Attention All Officers

## 2016 Recruitment Challenge: There's Still Time!

The end of the year is right around the corner and that means the 2016 Recruitment Challenge will also be coming to an end. To help your lodge push through the last few weeks of 2016 and end on a high note, here are a few answers to some frequently asked questions about the Recruitment Challenge.

### **When do membership applications need to be submitted to Sons of Norway Headquarters?**

To ensure your new members count towards your end of year number, you should make sure all applications are submitted to Sons of Norway Headquarters by December 15th. Any applications received after that date may not be processed by the Accounting Department before the end of the year.

### **Do Unge Venner members count towards the total?**

No. Even though young people are great for the lodge, only full dues-paying members count towards your lodge's score.

### **What are the prizes?**

The top scoring small and large lodges in each district will receive a \$250 prize. The top small and large lodges overall will appear in a 2017 issue of *Viking*.

Remember, your lodge must finish with positive growth in order to qualify for the prize.

### **When will the winners be announced?**

The winning lodges will be announced in the January R&R. In that issue, you'll also find the top 3 scoring large and small lodges in each district.

## **Questions?**

## **Need additional information?**

For more information about the 2016 Recruitment Challenge, log onto the [contest page](#) on the Sons of Norway website. For questions, contact Joe Eggers at [membership@sofn.com](mailto:membership@sofn.com).

**Attention All Officers**

## Recap of the 2016 International Convention

This past August, Sons of Norway members and delegates from throughout our organization came together for the 2016 Biennial International Convention.

The official minutes of the lodge meeting will be distributed by postal mail to all International Board Officers and Directors, delegates and Sons of Norway lodges. A synopsis of changes to the policies, procedures and laws of Sons of Norway approved at the convention will appear in an upcoming issue of *Viking* magazine.

### Officer Updates

Once the business of the organization was completed, it was time for the delegates to turn their attention to matters of the future, like voting for new board members, determining the location of the next International Convention and recognizing Lodge of the Year winners.

### Welcome New and Returning International Officers and Directors

#### Newly Elected International Officers

Marci Larson (Secretary)  
Elaine Nelson (Treasurer)

#### Reelected International Officers

Jon Tehven (President)  
Ron Stubbings (Vice President)

#### Newly Elected International Directors

Karl Hella (District 1)  
Mark Agerter (District 2)  
Kenneth Johnson (District 3)  
Steven Halverson (District 4)

#### Returning International Directors

Jon Grinde (District 5)  
Roger Espeland (District 6)  
Gloria Benazic (District 7)  
Odd Harald Olsen (District 8)

#### Retiring International Board Officers and Directors

Dan Rude (Secretary)  
Ray Knutson (Treasurer)  
Bob Hoover (District 1 Director)  
Erlene Stevenson (District 2 Director)

### Winners Announced

Lodge of the Year is awarded to one large and one small lodge each year that have excelled beyond all others in five areas: Promoting heritage and culture, preserving heritage and culture, promoting lodge and benefit membership growth, supporting the community and the Sons of Norway Foundation, and complying with Sons of Norway procedures. Size determinations (large and small designations) are based on the median size in each district.

#### 2014 and 2015 International Lodges of the Year

2014 Large Lodge: Poulsbo 2-044, Poulsbo, WA  
2014 Small Lodge: Rumelva 1-685, Cambridge, MN

2015 Large Lodge: Valkyrien 5-053, Woodville, WI  
2015 Small Lodge: Oslo 3-438, Syracuse, NY

### 2018 International Convention

The delegates voted on the location of the next International Convention, which will be Bloomington, MN. Dates of the convention will be announced in the future.

### Welcome New and Returning District Presidents

District 1 – Dennis Rusinko (newly elected)  
District 2 – Chris Hicks (newly elected)  
District 3 – Mary Anderson  
District 4 – Nordy Riley (newly elected)  
District 5 – Andrew Johnson (newly elected)  
District 6 – Mary Beth Ingvoldstad  
District 7 – Erik Brochmann  
District 8 – Per Mikalsen

Attention All Officers

## Lodge Officer Updates: A Reminder

Most lodges hold their election for officers in November. Whether your lodge has new officers or no changes, please report your list of officers to Sons of Norway Headquarters by December 15, 2016. Timely reporting is needed to ensure accurate information for the upcoming district directories.

### Option A: Online

Change your officers line-up quickly and easily by signing on to the member area of [www.sonsofnorway.com](http://www.sonsofnorway.com) and go to your member profile screen. You can do this by clicking on the word 'Profile' which is to the left of the 'Member Resources' button in the top right hand corner, then clicking on 'Member Profile.' 'Lodge Officer Updates' is the second option on the left hand side of the screen. Click on that link and then click on the 'Officers' button under the 'Select' heading.

### **No changes for 2017?**

Click the 'No Changes For Upcoming Year' button at the top of the screen.

### **Step 1: Adding a new office title to your list (Begin with this step.)**

Do you have an office title on your roster that is new for your lodge, such as Volunteer Coordinator? Perhaps you have an extra Social Director this year. Here is how you add an office:

- At the top of the officer list, click the button for 'Add a New Position.'
- Select a title from the drop down menu.
- Enter the member number for the person assuming the office.
- Click 'Submit' and agree to the change.

### **Step 2: Replacing a 2016 officer or removing an office title**

- Click into the field containing the member number of the member who held the office in 2016. Highlight that number and delete it.
- Type in the member number of the member who is taking over the position.

**Note:** *the name of the new member will not appear on the line until after you have submitted your changes.*

If an officer from 2016 is continuing in the same capacity in 2017, you do not need to make any changes to that line. If a position will not be filled in 2017, click the 'Remove this position' box. You can add it later if the position gets filled.

**Please make sure to make all changes before clicking the 'Submit Changes' button under the officer list.**

**NEW:** If you need to make more changes or corrections, click on the 'Go back to make corrections' button. The names listed will not have changed, but the member numbers will be for the 2017 officers you've already entered.

### **Change in Meeting Location and Time**

These changes can also be made online by selecting 'Change Meeting Information' on the left side of the 'Lodge Officer Updates' intro screen.

- Click on the 'Change Meeting Information' button.
- Make changes as needed and hit 'Save.'

### **Updating Officer's Contact Information**

Lodge officers cannot make changes to another person's contact information via the Sons of Norway website.

Individuals can sign on themselves and make these changes. If you are aware of an address, phone number or email change for an officer, you can email the change(s) to **Sherry Gorse** at [fraternal@sofn.com](mailto:fraternal@sofn.com) or by calling (800) 945-8851 ext. 643.

**Attention All Officers**

# Lodge Officer Updates: A Reminder

## **Option B: On Paper**

The 2017 Lodge Officer Update D63 form was mailed to lodge secretaries at the end of October. This form lists your 2016 officers on the left-hand side of the page. Any changes in officers can be recorded on the corresponding blanks running down the right-hand side. Member numbers, names and contact information for new officers will be needed to complete the form. Changes to the addresses and contact information of continuing officers, as well as the lodge's meeting place and time, can also be recorded.

## **Sending to your District Secretary**

If you file your D63 on paper, some district secretaries require their own copy. See the instructions that came with the D63 form (mailed to the lodge secretary) for more information.

## **No Changes for 2017?**

If your officers are staying the same for 2017, you can make note of this online or on the D63 form. Just follow the directions included with the mailing. You can also notify Sons of Norway Headquarters by contacting Sherry Gorse.

## **Elections Not Completed by Dec 15?**

Please send in the information you have and/or contact Membership Services (Sherry Gorse) to explain the situation. Updates made after December 15 should still be reported. There is a possibility that updates reported after the deadline may not be reflected in your district's Lodge Directory.

## ***Questions?***

## ***Need additional information?***

Contact **Sherry Gorse, Membership Services**, (612) 821-4643 or [fraternal@sofn.com](mailto:fraternal@sofn.com).

Attention All Officers

## Reporting the Passing of a Member

Informing Sons of Norway Headquarters about the passing of a member in a timely manner is extremely important. Not only does this knowledge mean that the member's name will appear in *Viking* magazine, but it also means that their families are spared the receipt of unwanted mail (dues renewal reminders) and, if they owned a financial product, any insurance claim can be processed quickly.

### Your assistance is needed.

Please notify Sons of Norway Headquarters when a member passes away. To make certain that the information is received, the financial or membership secretary should notify Sons of Norway Headquarters as soon as possible by using one of these methods:

- Filling out and mailing in a Death Notice card.
- Emailing the member's name, member number and date of death to [fraternal@sofn.com](mailto:fraternal@sofn.com).
- Calling (800) 945-8851 ext. 643 with the member's name, member number and date of death.
- Faxing the information to (612) 827-0658.

### Accuracy is Important

When reporting a death, please:

- Avoid embarrassment by verifying that the member being reported as deceased has actually passed.
- Provide accurate information on the notice, including correct spelling of the name and a correct member number.

### When Mistakes Happen

Occasionally, mistakes are made and a member is reported as dead or coded as dead in error. How will you know if there has been a mistake? Check your Monthly Lodge Activity Report, which is sent to the lodge vice president and financial or membership secretary on the second of every month. This report has a category where people who have been coded deceased in the previous month are listed. If there is a mistake, please contact **Sherry Gorse**, [fraternal@sofn.com](mailto:fraternal@sofn.com) or (800) 945-8851 ext. 643 immediately.

### In Loving Memory

Once a member's death has been reported, their name will be listed in a future issue of *Viking* in the "In Loving Memory" section— usually a deceased member's name will appear three to four months after the death is reported.

### Need Death Notice cards?

Download cards from Lodge Leadership Resources > Administrative Resources in the Members Resources section of [www.sonsofnorway.com](http://www.sonsofnorway.com) or contact **Mary Henkels, Supply Department**, [supply@sofn.com](mailto:supply@sofn.com) or (800) 945-8851 ext. 645 to order a supply of cards.

## Lodge Administration

# Barneløpet

### Have Fun and Gain Visibility

Fall is the time to schedule your lodge's Barneløpet (children's race). A Barneløpet is a fun and simple way for your lodge members to share their enthusiasm for *friluftsliv* (outdoor life/outdoor recreation) with each other, their family and the local community. What's more, having a Barneløpet is a great opportunity for visibility.

Once your Barneløpet is scheduled, please order your supplies (bibs and medals) to allow sufficient time for shipping.

**Questions? Need additional information?**

**Need to order Barneløpet supplies?**

Contact **Jana Velo, Cultural Coordinator**, at (800) 945-8851 ext. 642 or at [jvelo@sofn.com](mailto:jvelo@sofn.com).

## Lodge Administration

# Celebrate Lodge Anniversaries

### April through December

5-457	Solvang	Westby, WI	4/16/1916	100 years
8-017	Hamar	Hamar, NO	5/31/1991	25 years
8-018	Haugaland	Haugesund, NO	6/8/1991	25 years
3-615	Space Coast Viking	Melbourne, FL	6/30/1991	25 years
2-047	Fjeldheim	Bend, OR	7/8/1916	100 years
4-424	Normanden	Missoula, MT	9/6/1941	75 years
5-616	Fagernes	Blair, WI	10/18/1991	25 years
6-151	Hvite Fjell	Reno, NV	11/2/1991	25 years
6-083	Leif Erikson	Salt Lake City, UT	11/5/1966	50 years
5-614	Circle City	Carmel, IN	11/23/1991	25 years
1-175	Mjosen	Glenwood, MN	12/4/1916	100 years



## Lodge Administration

# FraternalGive.org

## Tracking Activities and Hours Easily

Throughout 2016, Sons of Norway lodges and districts have been tracking activities and volunteer hours by signing on to the website, [www.FraternalGive.org](http://www.FraternalGive.org). Sons of Norway is compiling this data to quantify the fantastic work our lodges do in support of their members and communities. These totals, combined with the data collected from lodges still using the paper forms, will be published in the Sons of Norway Annual Report in the spring of 2017 and the annual report book of the American Fraternal Alliance (AFA).

As of October 2016, a total of 56 lodges, 15% of our lodge count, have entered activities on the site, with the average lodge reporting a total of 24 activities. These lodges have reported a total of 1,082 events and 41,171 volunteer hours so far in 2016.

### Signing on to FraternalGive.org

Each lodge's user name is the name of their lodge and their lodge number. The user name does not include the district number or any place holding zeros. Some examples: Oslo 1-002 is Oslo2, Gulf Coast Vikings 3-683 is GulfCoastVikings683 and Peer Gynt 6-022 is PeerGynt22. Each lodge's password started out as Password1, but may have been changed by a former user.

### To personalize your FraternalGive profile:

The contact information for each lodge is defaulted to Sons of Norway Headquarters, unless personalization has been done. Please go in and change the email and other contact information to personalize your profile.

- Sign on with your user name and password.
- Click 'Edit Profile' which is on the right side of the screen under the words 'Log In.'
- Delete [Fraternal@sofn.com](mailto:Fraternal@sofn.com) and type in your email address. Leave the password fields blank unless you want to change your password.
- You can also personalize the name and phone number for your profile.
- Hit 'Save Changes.'

### Forgot your Password?

All passwords were originally set as Password1. If you try Password1 and it doesn't work, click 'forgot password' to have a new one sent to your email address. However, this will only work if you have personalized the email address on your profile (see above). If you cannot get a new password assigned or have other technical questions about the site, contact **Terry Whipple** at 630-522-6322 ext. 125 or at [twhipple@fraternalalliance.org](mailto:twhipple@fraternalalliance.org).

### Deadline for 2016 Reporting

Please enter all your activities for 2016 by 02/01/2017.

## Questions?

## Need additional information?

Contact **Sherry Gorse** at (800) 945-8851 ext. 643 or [fraternal@sofn.com](mailto:fraternal@sofn.com) with any questions or concerns.

## Lodge Administration

# Membership Categories Defined

What's the difference between each of the membership categories within Sons of Norway? Check out these definitions to help you understand the distinction.

## PRIMARY

Most members are primary members. A primary member pays the full amounts for international, district and lodge dues and receives their own *Viking* magazine monthly. A primary member can vote on lodge matters, hold office and serve as a delegate for his/her local lodge.

## SPOUSE

A spouse member is the wife or husband of a primary member and pays \$7.00 less in international dues, full district dues and the spouse dues for their local lodge. Spouse members do not receive their own copy of the *Viking* magazine. They can vote on lodge matters, hold office and serve as a delegate.

## UNGE VENNER

"Young Friends" are age 16–23 years old. If an Unge Venner is the lineal descendent of a current member or resides in the same household as a Sons of Norway member, then they will be exempt from paying dues under the "Family Membership" program. Free Unge Venner members stay current until they turn 24 years old, regardless of the status of their sponsoring member. Any other member of Sons of Norway between the ages of 16 and 23 will pay dues at a reduced rate.

Dues-paying Unge Venner get their own copy of the *Viking*. Dues-waived Unge Venner can receive a subscription to *Viking* magazine for a fee. Both dues-waived and dues-paying Unge Venner can vote, hold office and serve as delegates to conventions. Both dues-waived and dues-paying Unge Venner are taken into consideration when determining representation for district and international conventions.

## HERITAGE

A Heritage member is age 0-15 and must have a relative who is a Sons of Norway member in good standing. Their dues are always free. Heritage members cannot vote or hold office, nor are they included in the lodge membership count. Also, years as a Heritage member do not count towards golden membership or anniversary awards.

## AFFILIATE

Affiliate or dual membership allows people to belong to two lodges at the same time. Unless the lodge bylaws specifically define the rights of affiliate members, affiliates of a lodge have all the privileges of regular members, except they cannot vote on delegates or serve as delegates. The application process is as follows:

- The membership or financial secretary of the affiliate lodge, provides the member with an Application for Affiliate Membership (#AAM3028) to complete. The member fills out the top part of the form and returns it to the lodge.
- The membership or financial secretary fills out the Affiliate Membership Card, which is the bottom half of the form.
- The card is separated from the top part and given to the member. The top part of the form is kept for lodge records.
- The lodge may collect affiliate dues from the member at this point. Dues for affiliate members are annual and equivalent to the local lodge portion of regular dues.
- If the lodge would like Sons of Norway Headquarters to bill the affiliate member annually for this portion, the lodge should contact the accounting department.
- If the lodge wants to bill the affiliate member themselves, they should make a note to bill the member annually for affiliate dues on the anniversary of their induction as an affiliate member.
- Affiliate members are not included on lists or labels received from Sons of Norway Headquarters.

## Questions? Need additional information?

Contact **Sherry Gorse** (800) 945-8851 ext. 643 or [fraternal@sofn.com](mailto:fraternal@sofn.com).

## Lodge Administration

# Officer Duties: Who Does What?

It's time to elect new lodge leadership for 2017. To assist the nominating committee as they recruit candidates and develop a slate of potential officers, the following brief summary of duties for the top six local lodge officers may prove helpful:

**President**

The president is the highest-ranking officer and has general supervision over the lodge. He or she serves as the team leader who appoints committees, presides over meetings, encourages the activities of fellow lodge officers and helps to plan lodge programming.

**Vice President**

The vice president serves as the driving force behind membership recruitment and retention strategies, usually serving as chair of the membership committee. He or she should also be prepared to replace the president if the need arises.

**Secretary**

The secretary's primary function is to keep accurate and impartial records of all meetings of the lodge and of the board of directors. He or she also serves as the primary communicator between the lodge and its members.

**Financial Secretary and Membership Secretary**

Each lodge gets to choose whether they wish to have a financial secretary or a membership secretary. Both of these officers collect new membership applications, process requests to transfer membership and inform Sons of Norway Headquarters of membership cancellations and deaths. The financial or membership secretary is the primary communicator between the lodge and Sons of Norway Headquarters.

In addition to the duties described above, the financial secretary also collects money from lodge members and presents them to the treasurer as well as assisting the treasurer in the filing of financial reports. The membership secretary does not have these financial duties but focuses on the administration of membership as described in the first paragraph. In a lodge that has chosen the membership secretary structure, all financial duties are relegated to the lodge treasurer.

**Treasurer**

The responsibilities of the lodge treasurer include handling all incoming and outgoing funds, keeping accurate accounting records and preparing fiscal reports. He or she should also be present when the financial books are audited.

**Social Director**

The social director plans and supervises the social activities of the lodge. He or she works closely with any other officers who have a programming focus, such as the Cultural Director, Sports and Recreation Director, and Youth Director.

**Questions?****Need Additional Information?**

More information about lodge officer duties can be found in the Guides for Leadership in the members section of [www.sonsofnorway.com](http://www.sonsofnorway.com).

# Changing Lodge Bylaws

## A Handy Reference

### Is your lodge planning to:

- Change lodge dues?
- Accept members upon the payment of dues?
- Change from having a financial secretary to a membership secretary?
- Define the rights of affiliate members?

### If so, follow these steps to update your lodge bylaws:

1. Appoint a bylaw committee to review the current bylaws and recommend any change(s). (Reviewing lodge bylaws every 2 to 3 years is suggested.) Appointment of the committee is done by the lodge board.
2. Present proposed bylaw change(s) in writing and by reading them at a business meeting.
3. Schedule a vote on the proposed change(s) at a future meeting.
4. Notify all lodge members, in advance, about the proposed bylaw change(s) and when the vote on the change(s) will be conducted.
5. Vote on the proposed change(s). A two-thirds majority vote of the members present is required to adopt, repeal or amend the bylaws.
6. Submit the bylaw change(s), with the appropriate signatures (i.e. president, secretary and bylaw committee) to Sons of Norway Headquarters to be approved by CEO Eivind Heiberg and Legal Counsel.
7. Provide a copy of the bylaw change(s) to the district secretary
8. Wait for approval.

### Want to speed up approval?

- Use the Local Lodge Bylaws form (D57) available in Lodge Management > Lodge Forms in the members section of [www.sonsofnorway.com](http://www.sonsofnorway.com).
- Strike-through any language that is being removed and underline or highlight any new language.
- Do not include other correspondence in the same envelope with your bylaw change(s).
- Address the envelope to: Bylaw Change, Sons of Norway Headquarters, 1455 West Lake St., Minneapolis, MN 55408.

### What should be in your lodge bylaws?

Only laws unique to your lodge belong in your bylaws. This includes such things as dues structure, special membership fees (application fees), officer structure (membership or financial secretary), membership acceptance requirements (vote on membership or membership granted on the payment of dues) and the rights of affiliate members. Lodge rules and procedures should be maintained separately and should not be included in your lodge bylaws.

## Lodge Administration

# Staff Updates



**Rebecca Swanson** joined the Fraternal Department in June as the new Communications Manager. She recently relocated to Minnesota from Chicago, where she worked for nearly 13 years leading the communication team at the Illinois State Medical Society and their affiliate medical liability insurance company. Prior to that, she was Communications Manager at Park Nicollet's health care research and education division.

Rebecca holds a Bachelor's degree in English from the University of St. Thomas and completed graduate coursework in non-profit administration at St. Mary's University. She is second oldest of eight siblings and was raised in the Uptown neighborhood of Minneapolis, a stone's throw from Sons of Norway Headquarters. Rebecca has two adult children, Cynthia and Lucas.

Outside of work, Rebecca enjoys spending time with family and friends at her cabin in northern Wisconsin, cooking, gallery and museum hopping, and volunteering for arts-related publications and events.



**Christian Laland** joined our Insurance Services Department in July of 2016 as a New Business representative.

Christian has a Bachelor in Economics from University of Minnesota and holds Life, Health and Property & Casualty licenses in Minnesota. Prior to joining Sons of Norway, he was an insurance representative for State Farm for 5 years.

Born in Oslo, Norway, Christian moved to the US in 1987. He has lived in the Twin Cities area since 1996.

In his free time, Christian enjoys soccer, running, hiking, traveling and spending time with his family. He is also on the Board of Directors of Norwegian American Chamber of Commerce in Minneapolis.

Christian and his wife Pam have two children, Cecilia (20) and Owen (17).

## Lodge Administration

# Record Retention: What to Keep and What to Toss

Are you going to be continuing in your current officer position? If not, now would be a great time to do some house cleaning before files are transferred.

What should be kept and what should be recycled? Below are suggested guidelines for the retention of Sons of Norway paperwork.

## To be kept in perpetuity

- Lodge Charter
- Lodge Bylaws
- Lodge or District Building Association's financial and original records (such as articles of incorporation and charter) if applicable
- Lodge Seal Embosser ( if the lodge has one)
- Lodge Scrapbooks
- Secretary's Minute Book \*
- Membership Roster \*
- Membership Record Book(s) (3-ring binder(s) with complete, current individual membership record sheets for current members) \*

## Seven Years

- D17 Annual Financial Statement
- Treasurer's Cash Book\*
- Financial Secretary's Cash Book\*
- Cancelled checks, bank account statements
- Data filed with state/provincial taxation agencies
- 990 Tax Forms

## Two Years

- Treasurer's Record of Bills\*
- Membership Records of individuals who left the organization (suspended or cancelled) two or more years ago.\*

## One Year

- Treasurer's copy of the Financial Secretary's sxReport to Treasurer\*
- Financial Secretary's copy of above report\*
- Lodge copy of Membership Applications \*

*\*In many lodges, the forms marked with an asterisk are no longer being utilized. That information may be kept in a different format, such as on a computer spreadsheet. Don't be concerned if your lodge doesn't have some of these specific forms in its collection.*

## Questions?

## Need additional information?

Contact **Sherry Gorse, Membership Services**, (800) 945-8851 ext. 643 or [fraternal@sofn.com](mailto:fraternal@sofn.com).

## Retention of Membership Applications

As a reminder, Sons of Norway Headquarters retains completed membership application forms for two years from the date of submission. The Sons of Norway database will be the official record of an individual's membership with the organization.

## Lodge Administration

# Mark Your Calendars

**By September 1, 2016**

A renewal package for lodge liability insurance was sent to all lodge treasurers in September. This package included information regarding the coverage, a certificate of insurance for the lodge and an invoice for your lodge's share of the premium. Payments were due by October 15.

**By October 15, 2016**

Lodge liability insurance premium should have been sent to Sons of Norway Headquarters by October 15. Questions? Contact Lindsey Rasmussen, (800) 945-8851 ext. 672 or [lasmussen@sofn.com](mailto:lasmussen@sofn.com).

**In October 2016**

Lodge Officer Update/D63 Forms are mailed to lodge secretaries.

**In October 2016**

Lodge Achievement and Family Lodge of the Year forms are mailed to lodge secretaries with instructions.

**By December 15, 2016**

Lodge Officer Update/D63 information is due to Membership Services at Sons of Norway Headquarters. Your new slate of officers should be submitted:

- via our website ([www.sonsofnorway.com](http://www.sonsofnorway.com)), preferred,
- by mail (Sons of Norway, 1455 W Lake St, Minneapolis, MN 55408, Attn: Membership Services),
- by e-mail ([fraternal@sofn.com](mailto:fraternal@sofn.com)) or
- by fax (612) 827-0658.

**By February 1, 2017**

Lodge Achievement form, Family Lodge of the Year and AFA Year End form (if activities are not entered on Fraternal-Give.org) are due to Sons of Norway Headquarters.

## Foundation

# Help us celebrate Foundation month this October by doubling your donation!



## Join the 50th Anniversary Give Together

To celebrate the Sons of Norway Foundation's 50th Anniversary we are asking lodges to collectively help raise \$50,000. When we reach our goal each district will receive a \$1,000 grant to use for Foundation related purposes.

We are already over halfway to our goal. At press time, we have raised more than \$30,000. With your help we can support more camp and college scholarships, and more educational and cultural programming.

Here's another exciting campaign development: Your donation will be doubled through a generous matching gift of \$50,000.

It's easy – you can donate online on our ['Give Together'](#) page. Better yet, for even more effective fundraising, start your own [lodge fundraising page](#) for the Foundation and ask your friends and family for their support. Reaching out to your community is also a great recruitment tool for letting others know how your lodge is committed to good works.

Let's come together and donate today at [www.sonsofnorway.com/givetogether](http://www.sonsofnorway.com/givetogether).

Thank you for your support.

## Easy Fundraising Ideas

### Host a lodge new member dinner.

Many lodges host a dinner before their meeting. Consider asking for a donation for the meal and donate the money to the Sons of Norway Foundation to help celebrate Foundation Month!

Call your local FBC and inquire about the \$400 available to you for a New Member Recruitment Dinner. You can recruit new members and raise money at the same time all with minimal or no cost to you. Not only will potential new members have a wonderful meal, but they'll have the satisfaction of knowing the money will be going to a great cause and they will learn how much your lodge cares!

### Organize a bake sale or garage sale.

Bake sales are usually a go-to option for fundraisers because everyone loves food! Garage sales are wonderful to help clean out closets and sale goers get great deals. Rather than setting prices on your items, consider making a huge jar & telling the buyers their money is going for charity. The larger the jar the better so they can fill it up!

### Have a Silent Auction

Most people think a silent auction is about expensive gifts and vacations. While these are great ideas for auction items, they aren't always practical. Consider auctioning off smaller gifts, homemade crafts or items that are donated by local businesses. The options are almost limitless when putting together a silent auction!

## Questions?

### Need additional info. or assistance setting up your lodge's fundraising page?

Contact Corrie Maki Knudson, Foundation Director, (612) 821-4632, [foundation@sofn.com](mailto:foundation@sofn.com) or [cknudson@sofn.com](mailto:cknudson@sofn.com).



Sons of Norway

# Financial Matters

## *Utilizing Your Financial Benefits Counselor*

Has your lodge established goals for 2017? In addition to goals for recruitment, retention and volunteer involvement, why not include goals related to better utilizing your lodge's Financial Benefits Counselor (FBC)? With your FBC's help, your other goals may be easier to achieve.

### **Here are some tips on how to utilize your FBC:**

- The Financial Benefits Counselor assigned to your lodge is a great resource. Take advantage of them by asking them to volunteer for a special, upcoming lodge event.
- Work with them to conduct a New Member Recruitment Dinner.
- Invite them to make a short presentation at a monthly lodge meeting.
- Arrange for them to conduct a question and answer program or seminar for the lodge.
- Encourage members to contact them for a private, one-on-one complimentary financial review.

### ***Want additional tips or need more information?***

Check with the FBC assigned to your lodge or contact **Len Carlson, Director of Agencies**, (612) 821-4609 or [lcarlson@sofn.com](mailto:lcarlson@sofn.com).

## Plan Ahead for Supplies

Need supplies for fall activities? You're not alone. Most lodges are gearing up after taking time off over the summer. As a result, fall is an extremely busy time for the Supply Department.

### Don't be disappointed.

To make certain that your lodge receives supplies when needed, without having to pay rush-shipping charges, please remember to:

- Allow at least 15 working days to receive your order
- Allow additional time for large orders
- Order only what is actually needed.

### What is available?

Commonly requested materials available through the Supply Department include:

- Event Kit
- Something for Everyone
- Tubfrim cards
- Application form
- *Viking* magazine
- Placement mats and napkins
- Anniversary pins

For a complete list of supplies, please see the Lodge Supply Catalog in the members section of [sonsofnorway.com](http://sonsofnorway.com) (Member Resources > Lodge Leadership Resources > Administrative Resources > Lodge Forms)

### Remember:

Sons of Norway covers the first \$10.00 for shipping and handling, with the remaining balance charged to the lodge. Placing your order by email, instead of by phone, helps ensure that it is fulfilled accurately and quickly.

To place your order or ask a question about lodge supplies, contact **Mary Henkels** in the Supply Department at [supply@sofn.com](mailto:supply@sofn.com) (preferred) or (800) 945-8851 ext. 645.

## Dues Rate for New Members

Do you wonder what dues rate to charge a new member? Check out the online lodge directory on [www.sonsofnorway.com](http://www.sonsofnorway.com) (About Us > Lodge Directory). The rate for primary, spouse and dues paying Unge Venner members are listed for each lodge.

# Contact Us

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