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I. INTRODUCTION

From our beginning, Sons of Norway has strived to preserve and promote Norwegian heritage and culture, and to provide assistance to our members, lodges and communities. To help achieve these goals within the United States, the Sons of Norway Foundation was begun, receiving its 501(c) (3) tax-exempt status in 1966.

(Note: *In 1971 the Sons of Norway Foundation in Canada was formed under the authority of the Canada Corporations Act. While both Foundations have similar goals, their structures, governance and administration are quite different, reflecting the tax laws of their respective countries. This section of the Guide for Leadership is directed toward Foundation directors in the United States. Foundation directors in Canadian lodges should contact the President of the Canadian Foundation for guidance in performing their duties and responsibilities.*)

As the Foundation director, you hold an important position within your lodge and within the organization. With your help, the goals of the Foundation will be realized, preserving Norwegian heritage and culture for generations to come. Also, working with the Foundation enables our members to see some of our core values in action: those of fraternalism and mutual aid.

In the support of an effective Foundation, your duties include:

- Increasing members' awareness of the Foundation and its value as a significant benefit of membership
- Promoting the Foundation to the members and the community
- Helping the Foundation grow financially

This Guide for Leadership section will lead you to a better understanding of the Sons of Norway Foundation and its value to the organization. It will provide you with the tools and information necessary for you to do your job. This section provides information on:

- The structure of the Sons of Norway Foundation
- Sources of information about the Foundation
- The types of grants and scholarship available
- Promotional/information materials that are available
- How to help the Foundation grow

II. STRUCTURE OF THE FOUNDATION

The Foundation is lead by a board of governors that is composed of all members of the board of directors of Sons of Norway, plus the chief executive officer (CEO) and legal counsel. The board of governors serves without pay.

The Foundation board meets twice a year, in conjunction with the Sons of Norway Board of Directors meetings. Between full board meetings the Foundation's executive committee - consisting of the president, vice president, secretary, treasurer and CEO - is empowered to conduct Foundation business.

The director of the Foundation is a paid staff position, who reports to the CEO of Sons of Norway and whose major responsibilities are to:

- Support the board of governors and the programs and policies it establishes for the Foundation.
- Represent and promote the Foundation and its programs to Sons of Norway membership and to the public.
- Promote and organize the grant making and scholarship award activities.
- Accept gifts on behalf of the Foundation and ensure that those gifts are utilized according to donor restrictions.
- Develop and maintain contact with potential donors to develop their interest and participation in the Foundation.
- Support lodges and districts in their efforts to promote and to grow the Foundation.
- Develop and implement strategies for growth of the Foundation.

III. INFORMATION SOURCES

In addition to this guide, information about the Foundation can be found in the following resources:

A. VIKING MAGAZINE

Contains periodic articles that will keep you up-to-date on important Foundation deadlines, activities and highlights.

B. VIKING RESOURCE

Is a quarterly online publication (*available January 15, April 15, July 15 and October 15*), found in the members section of the Sons of Norway website. Viking Resource contains a calendar of due dates/deadlines, as well as additional information on Foundation activities.

C. FOUNDATION SECTION OF THE SONS OF NORWAY WEBSITE

(www.sonsofnorway.com/foundation)

The most comprehensive and up-to-date information about the Foundation. A valuable resource, that you are encouraged to review, the Foundation section of the website includes:

- The Foundation video
- Grant deadlines, application forms and instructions
- Scholarship requirements, deadlines, application forms and instructions
- Directions on how to make a donation
- Directions on how to make a legacy gift
- Current fundraisers

D. FOUNDATION DIRECTOR'S PACKET

Mailed in the fall of each year, the packet contains:

- Forms and instructions for current grants and scholarships
- Scholarship and grant deadline calendar
- Talking points to help explain and promote the Foundation
- Levels of membership pin information

- A recap of the proceeding 2 years of Foundation activities
- Current promotional materials
- Success stories and fundraising ideas

E. E-MAIL COMMUNICATIONS

Sent as needed (*monthly or every other month*), these communications provide deadline reminders, success stories, ideas for fundraising and other timely and sometimes critical information.

Important note: Because most communications from the Foundation comes by e-mail, notifying Sons of Norway of your current e-mail address is critical. Don't have a computer? Use a computer at the local library or community center and set up a free e-mail account (*hotmail, yahoo, etc*). If you do not have access to the Internet, please designate another lodge officer to accept these communications on your behalf and notify Headquarters of this individual's e-mail address.

IV. GRANTS AND SCHOLARSHIPS

Sons of Norway Foundation offers four grant and five scholarship opportunities. Each has its own application requirements, form and deadline. All pertinent information for each program can be found in the Foundation section of the Sons of Norway website: www.sonsofnorway.com/foundation or by contacting the Sons of Norway Foundation director. Your local lodge or district may support additional scholarship programs that are independent from those orchestrated by the Foundation.

Each year, a portion of the earnings from the various Foundation funds is available to award as scholarships and grants. The balance of each fund remains invested, allowing the principal to grow and ensuring the future of each program. Many funds are restricted and have set parameters of spending and growth. The Sons of Norway Foundation Board of Directors determines investment decisions and policies.

The Foundation board of governors establishes separate committees to review applications for these scholarships and grants each year. These committees are responsible for evaluating every application according to established criteria. Guidelines are available on the website and are included in the application instructions. Applicants are notified of the committee's decision regarding their submission approximately 12 weeks after the deadline.

A. FOUNDATION GRANTS

GENERAL HERITAGE AND CULTURE GRANTS

The General Heritage and Culture Grants are awarded to individuals, groups or organizations that promote the heritage and culture of traditional or modern Norway. Applicants do not need to be associated with Sons of Norway in order to apply. With a maximum award of \$3,000, grants typically range from \$500 to \$1,000. Examples of activities that may qualify include community festivals, cultural exchange programs, research projects, instructional videos and books. Applications must be post-marked by January 15 of each year.

LOCAL LODGE PARTNERSHIP GRANTS

Local Lodge Partnership Grants invites applications from Sons of Norway lodges that wish to promote Norwegian heritage in their communities. These are matching fund grants, with a maximum award of \$1,000. A lodge may receive only one grant per year. Examples of activities include hosting or participating in cultural fairs, hosting visiting groups, offering cultural skills classes, purchasing books for lodge libraries, etc. Applications must be post-marked by April 1.

HELPING HANDS TO CHILDREN GRANT

The Helping Hands to Children Grant is a matching funds grant for lodges that helps establish educational/heritage programming for youth. Eligible programming includes Adopt a School, Barnas Norsk Klubb, Children's Folk Dancing Groups, Junior Lodges, Heritage Camps and special programming for youth. The maximum award is \$500. Applications must be postmarked by February 1.

HELPING HANDS TO MEMBERS GRANT

This grant is offered to help Sons of Norway members who are victims of natural disasters such as floods, wild fires, hurricanes, tornados and other catastrophes, and whose homes are deemed unlivable due to such a disaster. Applications are made through the district presidents and the Sons of Norway Foundation director and are accepted throughout the year.

GRANT CHECKLIST

You may be called on to help your lodge or another interested party prepare a grant application. While specific questions should be directed to the Sons of Norway Foundation director (*foundation@sofn.com*), please remind the applicant(s) of the following:

- Each grant has its own requirements.
- Grants are awarded once per year, with the exception of Helping Hands to Members Grant.
- Grant deadlines (*post-mark requirements*) are firm. Faxed applications are not accepted.
- All requested information must be provided and sent in one envelope.
- The appropriate lodge officer(s) should be made aware of the grant request.
- The lodge president must sign the application.
- Applications should be for upcoming events, not events that have already passed.
- Funds should be used within one calendar year of being awarded.
- Grant funds must be spent on the event or the cost specified in the award.
- Immediately following the event/activity, a report is requested and should be sent to the Foundation director.
- Photos and videos are also encouraged and become the property of the Sons of Norway Foundation. They may be used for future Foundation promotional materials, including articles in the *Viking* .

B. FOUNDATION SCHOLARSHIPS

KING OLAV V NORWEGIAN-AMERICAN HERITAGE FUND

This fund welcomes applications from Americans, 18 years or older, who are planning a course of study related to Norwegian heritage or modern Norway at a recognized institution of higher learning. The fund also welcomes Norwegians, 18 and older, who desire to further their studies in North American culture at an institution of higher learning. Typical awards range from \$1,000 to \$1,500. Applications must be postmarked by March 1. A student may be awarded a maximum of two scholarships within a five-year period.

ASTRID G. CATES/MYRTLE BEINHAUER FUND

Applicants must have a certificate of completion from high school, be enrolled in post-secondary training or education (*college, vocational school, or trade school*), and be current members of Sons of Norway, or children or grandchildren of current Sons of Norway members in Sons of Norway districts 1–6. Financial need is a major consideration in determining scholarship recipients. Two \$3,000 Beinhauer scholarships and six \$1,000 Cates scholarships (*one per district*) are awarded each year. Applications must be postmarked by March 1.

NANCY LORRAINE JENSEN MEMORIAL SCHOLARSHIP FUND

This fund encourages female American citizens between 17 and 35 to apply for financial assistance for college degrees in chemistry or physics, or in chemical, electrical or mechanical engineering. The candidate, or parent/grandparent of the candidate, must be a current member of Sons of Norway. The annual scholarship award will be no less than 50% for one term (*quarter or semester*) and no more than 100% of the tuition for one year. Any applicant may receive three awards during her undergraduate study. Applications for this scholarship must be postmarked by April 1.

SCHOLARSHIP TO OSLO INTERNATIONAL SUMMER SCHOOL

The Sons of Norway Foundation offers one \$1,500 scholarship each year for a student to attend the Oslo International Summer School. (*Sons of Norway offers a second \$1,500 scholarship.*) Applicants who are admitted to Oslo International Summer School, and who are current Sons of Norway members or children or grandchildren of current members, are eligible. Applications must be postmarked by March 1.

HELEN TRONVOLD NORWEGIAN FOLK HIGH SCHOOL SCHOLARSHIP

Applicants for this scholarship must be current members of Sons of Norway or children or grandchildren of current members, and between the ages of 18-23. They must have completed high school (U.S.) and be accepted for attendance by a specific Norwegian Folk High School. Three \$2,000 scholarships are awarded annually. Applications must be postmarked by March 1.

SCHOLARSHIP CHECKLIST

You may be asked to assist a scholarship applicant in completing and application. While specific questions should be directed to the Sons of Norway Foundation director (*foundation@sofn.com*), please advise the applicant(s) that:

- Each scholarship has its own requirements.
- The most current version of each scholarship application is available in the Foundation section of the Sons of Norway website by November 1 each year for the following year's awards.
- Scholarships are awarded only once a year, in the spring, for the following school year.
- All scholarship applications must be post marked by the required date and those dates are firm. Faxed applications are not accepted.
- All requested information must be provided in one envelope in order for an application to be considered.

C. OTHER SCHOLARSHIPS OPPORTUNITIES YOU MAY BE ASKED ABOUT

DRAXTEN MEMORIAL SCHOLARSHIP FUND

Each year U.S. districts are allocated funds, based on membership, to provide scholarships to individuals under the age of 19 to study at Norwegian heritage camps. The district will provide information about the distribution of these funds.

DISTRICT SCHOLARSHIPS

Your district may have scholarships for youth who plan to attend summer language camps and/or for those who are planning post-high school education. Typically, the district scholarship chair will provide information about qualifications, deadlines and application procedures, as well as your role in its administration.

LOCAL LODGE SCHOLARSHIP

Your lodge may have a scholarship fund. If so, you may be involved in its administration.

If your lodge does not have a scholarship fund, you may be asked about forming one. An excellent resource is Sons of Norway Headquarters for advice on the steps to follow and for review of each component of the fund (*rules, bylaws, etc.*) to insure that your lodge's scholarship meets IRS guidelines.

VI. GROWING THE FOUNDATION

As the Foundation director of your lodge, you are instrumental in growing Foundation funds. While there are many things that can be done to help grow the financial assets of the Foundation, please be aware of these major fundraising activities. By actively promoting these opportunities, your lodge and its members can have a significant impact on vitality of the Foundation.

A. FOUNDATION MONTH

October is designated Foundation Month by Sons of Norway. During this month you are asked to do two activities:

- Take time at a lodge meeting to explain and promote the Foundation. (*Talking points are provided in the Foundation director's packet.*)
- Coordinate a fundraising event, with the proceeds going to the Foundation. Fundraising event ideas can be found in the Foundation director's packet that is mailed out each fall. (*Consider doing this as a joint effort with the lodge social director.*)

B. MEMORIALS AND TRIBUTES

To honor members when they pass away or to celebrate a lodge member's achievement or anniversary, lodges and members are encouraged to send a donation to the Sons of Norway Foundation. Typically, a lodge donation is between \$10 and \$50. The Foundation will notify the member's family of the donation. These donations generally go into the Heritage and Culture Fund.

C. DONATIONS AND PLEDGES

Donations and pledges made by lodges and members make a significant contribution to the assets of the Foundation. Donations to any of the Sons of Norway Foundation scholarship and grant funds can be made using the Foundation donation form. A separate form is available to make an on-going donation to the Foundation. Both donations and pledges can also be made in the Foundation section of the Sons of Norway website or by pledge card.

A brief description of each fund administered through the Sons of Norway Foundation is available on both the donation and the pledge forms. Descriptions can also be found in the Foundation section for the Sons of Norway website www.sonsofnorway.com/foundation.

You may be asked to assist a donor or your lodge making a donation and/or a pledge. Please advise the donor that:

- If they are using the printed donation or pledge form, the form should be filled out completely and legibly. The donor should include their name, member number, mailing address, telephone number, e-mail address, lodge name, district and lodge number.
- If the donation is a memorial, that section should be completed as well.
- A separate form should be used for each donation.
- The fund to receive the donation must be indicated.
- An individual who donates \$90 or more will receive a pin acknowledging their donation.
- "Pass through" donations (*donations to the Foundation that go to other organizations*) do not qualify for donation pins.

D. LEGACY GIFTS

Members of your lodge may have the potential and/or interest in making a future or legacy gift to the Foundation. They may wish to provide for the Foundation in their will, create a revocable trust or beneficiary designation, make a major memorial gifts, create a scholarship, create a charitable trust, or make a gift of life insurance, appreciated stock, or real estate. If you know members who would be interested in a gift of this kind, please refer them to the director of the Sons of Norway Foundation.

