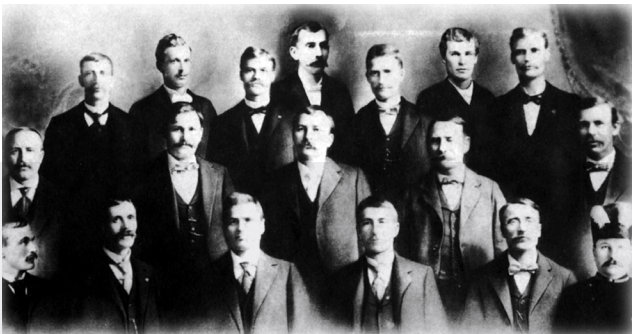




# NEW LODGE ORGANIZATION GUIDE



## About Sons of Norway

Sons of Norway was founded in 1895 by 18 Norwegian immigrants in Minneapolis, MN, who wished to provide mutual assistance for members of their community and celebrate their shared heritage. Today, Sons of Norway continues as a fraternal life insurance company, which is a type of insurance company that is owned and run by its members, who are bound together by a shared interest or identity.

*“The mission of Sons of Norway is to promote and to preserve the heritage and culture of Norway, to celebrate our relationship with other Nordic countries, and provide quality insurance and financial products to its members.”*

## Introduction

Sons of Norway lodges are an integral part of the membership experience and the foundation upon which this organization is built. Each lodge has a unique personality that is expressed through its members, its endeavors within the community and the activities it undertakes to promote Norwegian heritage and culture.

## What Is a Lodge?

A lodge is a local organizational unit of Sons of Norway that provides regular gathering opportunities for like-minded individuals who share an interest in Norwegian heritage and culture, philanthropy, fellowship and community service.

Lodges typically meet at least 8 times per year on the same day and time each month at a predetermined location. Lodges can also hold a party or take part in an event or party in place of one or more of their social meeting. Some lodges also organize smaller groups that meet at other times, such as classes, workshops, volunteer teams and special interest groups. Along with social meetings, as described above, lodges are encouraged to hold an additional meeting each month to conduct the business of the lodge. If lodge business is not covered at a separate meeting, it should be integrated into that month's social meeting. Some lodges have their own buildings, but most rent space in a community center, church or other public building.

Each lodge is governed by officers elected by and from its membership. The primary officers are President, Vice President, Secretary, Membership Secretary/Financial Secretary, Treasurer and Social Director. The lodge can also receive support from the local zone director, district officers and the assigned Financial Benefits Counselor (if available).

## Why Start a New Lodge?

A new lodge is founded in order to bring together a local community of Norwegian descendants and those who have an interest in Norwegian heritage and culture. Being Norwegian or a descendant of a Norwegian is not a requirement for membership.

## Who can start a new lodge?

The process of starting a new lodge often begins with:

### 1. District officer(s) or local Financial Benefits

**Counselor.** Often they have done research and have determined that a community would be a good place to start a lodge. This research can be based on census data or interest generated by a Sons of Norway booth at a Scandinavian Festival in the target community.

### 2. A local Sons of Norway member or non-member who is excited about the organization.

Perhaps this person has had experience with a Sons of Norway lodge in another location, they have friends and/or family members who have been involved with the organization or they are interested in connecting with their Norwegian heritage and culture.

## When An Inquiry is Made

When someone contacts Sons of Norway Headquarters about the possibility of starting a new lodge, Membership Services notifies the president of the district in which the potential new lodge is located and provides them with contact information for the person making the inquiry. At the same time, Membership Services sends a New Lodge Organizing Representative's Guide to the person who initiated contact. This guide includes a New Lodge Organization Inquiry Form that requests basic information about the targeted area and the members wishing to start the lodge. When completed, this form is sent to the district president for review.

## Making the New Lodge Official

Even before receiving the completed New Lodge Organization Inquiry Form, the district president should determine the zone assignment for the new lodge and notify the appropriate zone director. The zone director or another district officer should contact the person inquiring about starting a new lodge to answer any questions and to offer support. They should touch base with the interested representative at least every two weeks going forward. When the district president receives the New Lodge Organization Inquiry Form, they should decide if the

proposed new lodge is feasible. Some of the factors to consider include:

- Where is the potential lodge in relation to other lodges? If it is too close, there might not be enough local members to sustain both lodges.
- If there is another lodge in the area, would they be interested in helping the new lodge get started?
- Are there enough people of Nordic descent or interest in the area?
- How many members live in the area currently?
- Does the person who expressed interest in starting a new lodge have experience with Sons of Norway? Have they helped start new lodges in the past?

If the district president decides that starting a new lodge has merit, they will sign the New Lodge Organization Inquiry Form and forward it to Membership Services at Sons of Norway Headquarters.

If an "Organizing Representative" isn't already established, the district president should appoint one to serve as the main contact and leading force behind the new lodge start. This representative can be a district officer, zone director, Financial Benefits Counselor, a local Sons of Norway member or an interested non-member. Typically, it is the person who completed the New Lodge Organization Inquiry Form. Having prior experience starting a lodge is helpful, but not required.

When Sons of Norway Headquarters receives the completed and signed New Lodge Organization Inquiry Form, a record for the new lodge is created in the database, a lodge number is assigned and an FBC is designated (if applicable).

**Note:** A pending lodge has two years to institute once it has been assigned a lodge number.

At this point, the district president and the organizing representative are notified that the lodge is officially recognized. Application and transfer forms, along with copies of *Viking* magazines and promotional materials, are sent from Sons of Norway Headquarters. Applications for membership and requests for transfer can now be submitted to Headquarters for the pending new lodge. The pending lodge is listed in the online directory, with the organizing representative listed as the lodge contact. This allows interested individuals to join the pending lodge online.

To help the representative connect with current members,

a district officer can request a list of district members in the area. The list can be sent to the district officer or directly to the representative. Permission must be sought from other district presidents if lists of members from outside the district are desired.

**Note:** Since Sons of Norway Headquarters cannot process any new member applications or requests to transfer into a new lodge before a record is created in the database, completing the New Lodge Organization Inquiry Form early in the process is recommended.

## Building a New Lodge

Once the new lodge is officially recognized, the organizing representative, along with other local members and with guidance from district officers, plans a series of meetings and related activities to establish the lodge:

### Informational Meeting(s)

Interested members and potential members come together to learn about Sons of Norway and the benefits of a local lodge during Informational Meetings. These meetings can be held before the lodge has been assigned a number by Sons of Norway Headquarters.

**Hint:** An Event Kit from the Supply Department provides promotional materials, along with membership applications and transfer forms.

### Organizational Meeting

Important details and functions of the lodge are established at the Organizational Meeting. Plans are made for the Institutional Meeting, which is when the lodge is officially opened. At this meeting:

- Temporary officers are elected (president, if the organizing representative doesn't want to serve in that capacity, secretary and treasurer).
- Names for the lodge are discussed.
- Regular meeting locations, days and times are considered.
- A date is set for the Institutional Meeting, which will be the first official meeting of the new lodge.

### After the Organizational Meeting

Once the name of the lodge has been decided, the number has been assigned by Headquarters and temporary officers are elected, it is time to take care of some administrative matters.

The lodge needs to:

- Apply for an employer identification number (E.I.N.) at [www.govfilingsonline.org/Number](http://www.govfilingsonline.org/Number) (form #SS 4). The official name of the lodge should be

used, along with the Group Exemption Number 0108.

- Establish a bank account (usually done by the temporary treasurer).

## Minimum Membership Required

A pending lodge needs to have at least 25 adult members (ages 16 and up) before it can be instituted. These adult members can be new to Sons of Norway or they can be current members who wish to transfer from another lodge. New members in the US can join in one of the following categories. Contact Membership Services for information about membership fees in Norway and Canada.

- Single Membership (\$60): Anyone ages 16 and up who does not live or share a mailing address with another Sons of Norway member.
- Family Membership (\$95): Two or more members, ages 16 and up, who live at the same address or share a mailing address. All members of a family, ages 16 and above, are counted towards the 25 members required to institute a lodge.
- Heritage Membership (Free): Children ages 0-15 who have a relative who is a member of Sons of Norway. These young members do not count towards the lodge membership total of 25 adults necessary to institute a new lodge.

New members can join the pending lodge online at [www.sonsofnorway.com](http://www.sonsofnorway.com), can mail in a membership application to Headquarters or can hand in an application at a lodge meeting.

People who are already members of Sons of Norway can transfer into the pending lodge by contacting Sons of Norway Headquarters or by completing a Transfer Form. They can mail a Transfer Form to Headquarters or hand one in during a lodge meeting.

## Institutional Meeting

This event is the first official meeting of the new Sons of Norway lodge. Dignitaries from the district and the International Board are often in attendance to participate in the festivities, and to deliver the lodge escrow check, which is the total amount of dues Headquarters has collected for the lodge since it was assigned a number as an official pending lodge. Though it is a celebration, official lodge business is still conducted:

- Officer elections and installations are conducted.
- The new lodge name is voted on.
- A vote is held to determine how long the charter will remain open (60 or 90 days). Individuals who

join during this time period are considered charter members, even though they might not have attended the Institutional Meeting.

## Charter Meeting

This meeting takes place at the time decided at the Institutional Meeting (60 or 90 days from the Institutional Meeting). At least 2 weeks before this meeting, the lodge secretary should notify Membership Services at Sons of Norway Headquarters. Staff will prepare the official Charter Document for the lodge to be awarded at the upcoming Charter Meeting. The Charter Meeting can be a regular monthly meeting or a separate event. Typically a district or international officer is invited to officiate the meeting and to present the Charter.

## New Lodge Finances

All dues for new and transferred members are held in an escrow account at Sons of Norway Headquarters until the lodge Institution Meeting. A check for the escrow amount is awarded to the new lodge by the district officer at the institution meeting. If members have invested their own money in funding lodge activities and/or materials, they can be reimbursed out of the escrow account.

If a lodge wants advance funds before their institution, money can be borrowed from the escrow account. This advance cannot exceed \$500.

Whether an advance requested by the lodge or reimbursement to a member for lodge expenses, those payments are subtracted from the amount held in escrow.

For the full 12 months following the date of institution, all dues paid by new and transferred members are returned to the lodge. At the end of the first year, and going forward, the lodge will receive \$14 for every single membership and \$28 for every family membership, for both new and renewing members (lodges in the US). This money is sent by Sons of Norway Accounting Department on a monthly basis to the lodge treasurer (Lodges in Canada and Norway will receive the local lodge amount of membership dues indicated in their bylaws.)

## District Expenses

Certain district expenses may be reimbursed by Sons of Norway Headquarters after the lodge is instituted. Reimbursement is limited to \$3,000 and must meet the following guidelines:

- These funds shall be available only when the organization of a new lodge has been requested and approved in the proper manner, and when applied for by the district secretary or treasurer.

- Receipts for all expenses being reimbursed are required. These expenses may include publicity, hall rental, refreshments, entertainment and travel expenses for district officers.
- Certain items are traditionally purchased by the district or other local lodges as gifts for the new lodge, such as regalia, flags, charter pins and other similar supplies. Expenditures for these items are not reimbursable.
- Requests for reimbursement must be submitted by the district treasurer to Headquarters on the Request for New Lodge Organizational Grant Form (attached) within 60 days of the date that the lodge is instituted.

## Who Does What?

Starting a new lodge requires the involvement, communication and cooperation of many individuals from throughout the organization—a team effort. Those typically involved include:

### Organizing Representative

The key person during a lodge start is the organizing representative. This person plans and leads the first meetings and keeps those involved on track throughout the entire process. They are the first contact potential members of the new lodge have with Sons of Norway. Their enthusiasm and dedication are critical to the momentum of the new lodge.

This person, may be a member living in the area, a district officer, a FBC or an interested non-member. Having previous experience in starting a new lodge is helpful, but not required.

The organizing representative's duties include:

- Being responsible for all lodge and membership materials until the lodge is officially instituted.
- Being the principal person involved with new member sign-up.
- Providing Sons of Norway Headquarters with updates concerning the new lodge, such as names of temporary officers and meeting dates.
- Requesting forms and supplies from Sons of Norway Headquarters when needed.

### District President

The district president decides, based on the New Lodge Organization Inquiry Form, if the location in question can support a new lodge. If the district president determines that the new lodge will be viable, he/she will sign and forward the form to Membership Services.

Once the lodge has been approved, the district president appoints an organizing representative to be the person to shepherd the new lodge from start to institution.

The district president is usually present at the institution meeting to officially start the lodge.

### **District Vice President and/or Zone Director**

Typically either the district vice president and/or zone director maintains regular contact with the organizing representative to answer questions and provide information.

### **Financial Benefits Counselor**

If Sons of Norway is licensed to sell insurance in the state in which the pending lodge is located, a financial benefits counselor is assigned to the new lodge. The assistance they provide varies depending on how geographically close they are to the lodge. They may help with recruiting new members, assist with publicity for the meetings, explain financial products, and explain the relationship between the financial business of the organization and the fraternal aspect.

Since some financial benefits counselors work with several lodges, they may be able to provide program ideas and answer meeting procedure and lodge administration questions.

## **Membership Manager**

The Membership Manager at Sons of Norway Headquarters provides ideas to attract new members to your lodge along with strategies to keep members engaged and excited about the pending lodge and Sons of Norway. The manager can be contacted at 800-945-8851, ext. 4608, or by email at [membership@sofn.com](mailto:membership@sofn.com).

## **Membership Services**

The primary resource at Sons of Norway Headquarters for information on starting a new lodge, as well as questions regarding membership and lodge administrative matters, Membership Services is an invaluable resource. Contact them at 800-945-8851 ext. 4654 or [fraternal@sofn.com](mailto:fraternal@sofn.com).

## **Supply Department**

To order membership applications and promotional materials, contact the Supply Department at 800-945-8851 ext. 4645 or [supply@sofn.com](mailto:supply@sofn.com).

## **Interim Officers**

Once the decision has been made to move ahead and form a new lodge, the group meets to select preliminary officers to assist the organizing representative. These temporary officers are typically chosen at the second meeting.

### **Temporary Secretary**

One of the most important temporary officers is the secretary. She/he coordinates the sign-up of new members and is specifically responsible for the following:

- sending new membership applications and dues received from new members into Headquarters.
- taking minutes of the institutional meeting
- turning over any materials relevant to their duties to the newly elected secretary and membership secretary once the lodge has been instituted.

### **Temporary Treasurer**

This temporary officer is responsible for setting up the bank account and keeping track of expenditures and receipts.

### **Presiding/Installing Officer**

This person presides over the institutional meeting until the newly elected president has been installed. In the event that there is both a presiding and an installing officer, the presiding officer opens the meeting and introduces the installing officer at the appropriate time.

# NEW LODGE ORGANIZATION INQUIRY FORM



**SONS of  
NORWAY**

1455 West Lake Street  
Minneapolis, MN 55408-2666  
Toll-free: 800-945-8851  
Phone: 612-827-3611  
[www.sonsofnorway.com](http://www.sonsofnorway.com)

## New Lodge Location Information

### Some Facts About the Area

1. Where will the new lodge be located?

City: \_\_\_\_\_ State or Province: \_\_\_\_\_

2. What is the population? \_\_\_\_\_

3. What is the estimated Norwegian population? \_\_\_\_\_

4. What is the name of the community's leading newspaper?

Name: \_\_\_\_\_ Editor: \_\_\_\_\_

Address: \_\_\_\_\_

Circulation: \_\_\_\_\_ Delivery:  Daily  Weekly  Bi-Weekly

5. Are lodge hall facilities available? \_\_\_\_\_ Rent \$ \_\_\_\_\_ Per month

6. Give names, addresses and positions of any city or community leaders who are of Norwegian Background:

A. \_\_\_\_\_

B. \_\_\_\_\_

C. \_\_\_\_\_

### Necessary Considerations

1. Are there any other Norwegian or Scandinavian groups now in existence in the area?

A. \_\_\_\_\_

B. \_\_\_\_\_

C. \_\_\_\_\_

2. State briefly the principal reason why it seems desirable to form a new Sons of Norway lodge in the area:

\_\_\_\_\_  
\_\_\_\_\_

3. List the names and addresses of people who have demonstrated interest in organizing a new lodge in this area:

A. \_\_\_\_\_

B. \_\_\_\_\_

C. \_\_\_\_\_

D. \_\_\_\_\_

E. \_\_\_\_\_

F. \_\_\_\_\_

4. What date is being considered for the actual organization of the new lodge? \_\_\_\_\_

*Continues on next page*

# NEW LODGE ORGANIZATION INQUIRY FORM (CONTINUED)

5. Is any officer of the district familiar with this area?  Yes  No

If yes, please give name and address: \_\_\_\_\_

6. Has a Financial Benefits Counselor been assigned to organize the lodge if approval is obtained?  Yes  No

If yes, please give name: \_\_\_\_\_

7. If International Headquarters approves the organization of the new lodge, you will be notified and a lodge number will be assigned. In that event, please state the name, complete address and telephone number of the person to whom all new lodge supplies should be sent.

Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_

This report has been completed by:

Signed: \_\_\_\_\_

Address: \_\_\_\_\_

**Upon completion, send this form to your District President for approval. This form, when signed by the District President, must be sent to Sons of Norway Headquarters for final approval.**

## New Lodge Organization Approval

The organization of a new lodge as outlined above is approved.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

District President

*Office use only: to be routed to Director of Agencies, Fraternal Director and CEO.*

# DISTRICT REQUEST FOR NEW LODGE ORGANIZATION REIMBURSEMENT GRANT



**SONS of  
NORWAY**

1455 West Lake Street  
Minneapolis, MN 55408-2666  
Toll-free: 800-945-8851  
Phone: 612-827-3611  
[www.sonsofnorway.com](http://www.sonsofnorway.com)

\* May reflect both pre-organizational and institutional meeting.

- \*1. Publicity (costs resulting from newspaper, radio or TV advertising, mailings to prospective members, and sending invitations)..... \$ \_\_\_\_\_
  - \*2. Rental of hall..... \$ \_\_\_\_\_
  - 3. Refreshments and entertainment..... \$ \_\_\_\_\_
  - 4. Actual transportation expense based on district transportation policy for District Officers selected to represent the District at the Organizational and Institutional Meeting..... \$ \_\_\_\_\_
- Total \$ \_\_\_\_\_**

***Funds will not be considered for regalia, flags, or charter pins which have traditionally been expenses borne by the district.***

***Request for reimbursement must be submitted by the district on the Request for New Lodge Organization Reimbursement Grant form.***

***PLEASE PROVIDE RECEIPTS OR EXPLANATIONS FOR ALL EXPENSES LISTED ABOVE. FORM MUST BE SUBMITTED WITHIN 60 DAYS OF THE LODGE INSTITUTION DATE.***

Number of new members at institutional meeting was \_\_\_\_\_, as certified by \_\_\_\_\_, Secretary Pro-Term or District Officer in attendance.

District No. \_\_\_\_\_ hereby requests a new lodge organization grant in the amount of \$ \_\_\_\_\_ (not to exceed \$3,000) for the organization of Lodge No. \_\_\_\_\_ at \_\_\_\_\_.

\_\_\_\_\_  
Signed (District Treasurer)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Approved Fraternal Director

\_\_\_\_\_  
Date