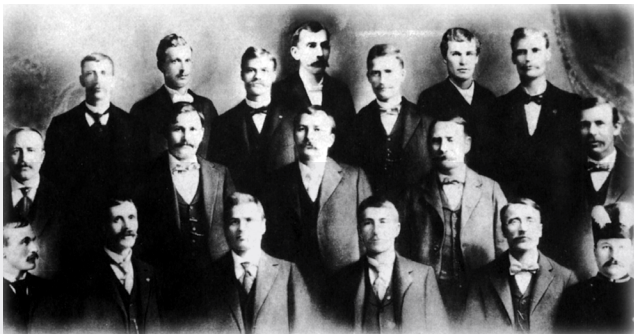




STARTING A NEW LODGE ORGANIZING REPRESENTATIVE'S GUIDE



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."

Thank you for your interest in establishing a new Sons of Norway lodge. We look forward to working with you on this exciting journey.

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 activity in place of one or more of these monthly social meetings. 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. A few 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.

How to Start a Lodge

As the primary contact for the new lodge, we ask you to help the district president, vice president, zone director and financial benefits counselor (if one has been designated) shepherd the new lodge through the steps of organizing. The Membership Manager and Membership Services at Sons of Norway Headquarters are also valuable resources. Contact information for these individuals is included at the end of this document.

Step 1: Complete the New Lodge Organization Inquiry Form

Your first task as the lodge organizer is to provide Sons of Norway with details about the area the new lodge will serve. This information is provided by completing the New Lodge Organization Inquiry Form (attached). When completed, mail or email the form to the district president.

The district president will review the information provided on the form and determine if the proposed area can support a Sons of Norway lodge. If approved, the district president will sign the form and forward it to Membership Services. You will be notified of the status of the new lodge by Membership Services.

The lodge is now officially in process. Sons of Norway Headquarters will assign a lodge number and temporary name. You will be entered as the lodge interim president (contact person) until officers are elected. This will allow prospective members to join the lodge on the Sons of Norway website: www.sonsofnorway.com.

Note: Since Sons of Norway Headquarters cannot process any new members or transfers into a new lodge before a record has been created in the database, completing the New Lodge Organization Inquiry Form early in the process is recommended.

Step 2: Add Members

Once the lodge can accept members, Headquarters will send you application and transfer forms, along with *Viking* magazines and promotional materials.

A 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(s).

New members in the U.S. can join in one of the following categories:

- 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): 2 or more members, ages 16 and up, who live at the same address or share a mailing address.
- 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. They do not have to live with a current member.

(Contact Membership Services for information about categories in Norway or Canada.)

New adult members can join the pending lodge online at 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.

To help you 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 you.

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

Step 3: Organizing the Lodge

A lodge is usually started with a series of meetings. These are organized by you, as the organizing representative, with the help of other members, district officers and the FBC, if one is assigned. The applications and promotional materials you received when the lodge became official should be used at these meetings.

Hint: An Event Kit from the Supply Department provides promotional materials, along with a banner, to use for the upcoming meetings. To order the kit and additional supplies contact the Supply Department at Sons of Norway Headquarters: supply@sofn.com or by phone at 800-945-8851 ext. 4645.

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.

After the presentation about the potential lodge, ask participants:

- How many are interested in having a Sons of Norway lodge in the area?
- If they know of others who would be interested in joining?
- When should the next meeting be held (date, time and location)?
- If anyone would like to help with mailings, finding the next location, contacting potential members, bringing and/or serving refreshments, etc.

More than one organizational meeting can be held. For each meeting, encourage attendees to bring family and friends. To continue to promote the new lodge, start up a newsletter or email list to keep new and potential members engaged.

Hint: A great resource to help you develop a plan for promoting this meeting and others is the Communications Tool Kit, which is available from www.sonsofnorway.com.

Organizational Meeting(s)

When the lodge is close to or at the required 25 members, it is time to hold an Organizational Meeting. Important details and functions of the lodge are established at this meeting(s). Plans are made for the Institutional Meeting, which is when the lodge is officially opened. At the Organizational Meeting:

- Temporary officers are elected (president, if the organizing representative doesn't want to serve as president, 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(s)

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\(form #SS 4\)](http://www.govfilingsonline.org/Number(form%20#SS%204)). 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)

Planning for the Institutional Meeting

To help organize the Institutional Meeting, you might find it helpful to have the following committees:

Arrangement Committee

This committee determines the date, time and place for the institutional celebration. They also plan for refreshments or dinner and any program that may be included.

Publicity Committee

This committee sends out invitations to the new members for the institutional meeting and arranges announcements of the meeting using the local media. Contact Membership Services for ideas.

Nominations Committee

This committee prepares a slate of officers to be presented at the institutional celebration. The following offices must be filled: President, Vice President, Secretary, Membership Secretary or Financial Secretary, Treasurer and Social Director. Other offices that may be filled include Cultural Director, Editor, Publicity Director, Youth Director, Sports and Recreation Director, Counselor, Greeters, Marshals and Trustees. If you have any questions, please contact Membership Services.

Note: Before the institutional celebration, please check with members being considering for nomination to make sure they are interested in serving as an officer.

Member Recruitment Committee

This committee assists the organizing representative in location and signing up new members. Contact District Officers and Membership Services for ideas.

Institutional Meeting

This event is the first official meeting of the new Sons of Norway lodge. Dignitaries from the district and the International Board should be invited 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.

Note: The institution of the lodge must be held within two years of the lodge receiving its number from Sons of Norway Headquarters.

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. 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.

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 a district officer. 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 for US lodges are returned to the lodge (\$60 per individual member, \$95 per family).
- 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.)

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 you, the organizing representative. You plan and lead the first meetings and keep those involved on track through-out the entire process. You are the first contact potential members of the new lodge have with Sons of Norway. Your enthusiasm and dedication are critical to the momentum of the new lodge.

Having previous experience in starting a new lodge is helpful, but not required.

The organizing representative's duties include:

- Completing the New Lodge Organization Inquiry Form.
- 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. 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.

Some financial benefits counselors work with several lodges, so 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.

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.

Supply Department

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

Interim Officers

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 in new membership applications, transfer forms and dues received from the new lodge's members.
- Taking minutes of the institutional meeting.
- Turning over any materials relevant to their duties to the newly-elected secretary and newly elected membership secretary once the lodge has been instituted.

Temporary Treasurer

The treasurer is also one of the first temporary officers. Their main duty is to set up the lodge bank account and keep track of receipts. The account needs to be set up in the location or name and number of your new lodge. Contact Membership Services if you don't know your lodge's number or with other questions.

Presiding/Installing Officer

This person presides over the institutional meeting until the newly elected president has been installed. In the even 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.

Contacts

Sons of Norway Headquarters

Mailing address:

Sons of Norway
1455 W. Lake St.
Minneapolis, MN 55408

Phone: 800-945-8851

Fax: 612-827-0658

District Officers

District President: _____

Zone Director: _____

Area Financial Benefits Counselor (FBC) (If applicable):

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

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.