



**SONS of  
NORWAY  
FOUNDATION**



# **ANNUAL REPORT 2019**

# Hallo Sons of Norway Members,

Here at the Sons of Norway Foundation, you probably know us for the grants and scholarships we award every year. These grants and scholarships support young scholars as they head to post-secondary education in the US and Norway. They support lodges and community partners in sustaining ties to contemporary Norway and providing cultural learning opportunities to many. They give back to members and children in times of need. These gifts are important, but even more important is what happens after the award.

For students, scholarships can provide a lasting connection to Norway and lead them to pursue opportunities they would not have imagined otherwise. For lodges, support for cultural events can draw in new members from the community and engage the interest of younger generations. For others, the grants that give back to vulnerable children in a lodge's community can forge lasting connections that benefit both sides for years to come.

As we celebrate Sons of Norway's 125th anniversary in 2020, we are excited about the future of the Foundation and the many ways that we can work together with you, our friends and supporters, to produce lasting impact. Please feel free to reach out to us and find out how the Foundation can help you create your legacy.

Tusen takk,  
Sons of Norway Foundation



# 2019 Financial Report

The financial information contained in this report is a condensed version of the fiscal year 2019 unaudited financial statements for the Sons of Norway Foundation. A complete set of the audited financial statements is available by contacting the Sons of Norway Foundation.

The Sons of Norway Foundation is primarily an endowment foundation. Grant and scholarship payouts are based on a percentage of the total assets, not on annual donations. Our commitment is to maintain and grow the charitable assets entrusted to us in a fiscally responsible way. Your financial support helps us achieve this goal.

## Statement of Activities Year Ended 12/31/2019

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### Revenues

Contributions	\$651,961
Investment/sales income	\$163,103
<b>Net capital gains</b>	<b>\$1,105,614</b>
<b>Other assets</b>	<b>\$86,216</b>
<b>Total revenues</b>	<b>\$2,006,893</b>

### Deductions

Scholarship and grant awards	\$142,651
General and administration expenses	\$191,640
<b>Increase in net assets</b>	<b>\$1,672,602</b>
<b>Net assets as of 12/31/2019</b>	<b>\$8,822,584</b>



## In 2019 we awarded:

\$12,600 in  
camperships for  
youth to attend  
Norwegian cultural  
camps across the US

\$30,300 in grants to  
local lodges,  
community partners,  
and members in need



## Grants highlight

### **Sunnyside Farms – Norwegian Fjord Horses**

Sunnyside Farms in Montana specializes in educational and therapy work using Norwegian Fjord horses, which were traditionally used for farming, war and dressage. A grant from the Sons of Norway Foundation allowed Sunnyside Farms to host a Norwegian family for a valuable cultural exchange. The family included a child with special needs, who especially benefitted from therapy and balance exercises with the horses.

“The support helped us create a special connection between our unique Norwegian Fjord Horses and a very delightful family from Norway. We crossed barriers, oceans and languages and created bonds that allowed us to speak one language through the horse of their heritage.”





## Grants highlight

### **Sagatun Lodge 1-18 – Viking Festival**

Festival-goers at the first Viking Festival in Brainerd, Minnesota, traveled back in time as they walked through a Viking Age encampment complete with reenactors demonstrating crafts from the period, such as leather-working, blacksmithing, open fire cooking, archery, jewelry making, and spinning and weaving. The lodge had expected about 500 attendees, but the event drew more than 900 people from all over the area, introducing many new and younger community members to the local Sons of Norway lodges.

“Receiving a grant from the Sons of Norway Foundation was crucial to the success of our first Viking Festival. Not only did the grant allow us to expand the scope of the experiences we could offer, but also it provided the credibility we needed to leverage additional funding, both from the community and our lodge members.”



# Scholarship highlight

## Kai Pederson

Kai received the 2019 Douglas Warne-Rolf & Wenche Eng Scholarship, which supports American or Canadian Sons of Norway members attending educational institutions in Norway. Kai currently attends the University of Wisconsin – Madison and because of his Norwegian upbringing, decided to study Norwegian and study abroad at the Norwegian University of Science and Technology.

He dove right into Norwegian student life, joining a linjeforeningen (study society) for his major and working as a barista at the student union, all while speaking entirely in Norwegian. The next part of his story—his travels around Norway—he tells best:

*I happened to stumble upon my fifth cousin during an expedition to Svalbard in the High Arctic. Yes, that's correct: I actually happened upon my family in the far reaches of the Arctic in Norway. Following some comparison of family trees, my Norwegian family invited me to a week of lobster fishing, mushroom picking, and family tree completion. ...In truth, I found a second home here."*

Kai plans to return to Norway for his PhD, and undoubtedly this experience has changed the trajectory of his future.

*"What I wish to convey above all is that [this scholarship], for lack of a less cliché phrase, made my dreams come true. I've found my long-lost family and had the greatest experience of my life – and it's not even over yet!"*

**\$18,000** awarded for American students to study in Norway

**\$82,000** awarded for students to study in the USA and Canada

**\$100,000** total scholarships



# Inspiring a legacy of philanthropy in the Nordic community

The name Doug Warne may sound familiar to some of you. He has been the host of the radio program “The Scandinavian Hour” for more than 55 years.

Doug, the son of a Washington halibut fisherman, decided after high school to attend the International Summer School (ISS) in Oslo, Norway. During his studies, Doug stayed with the Rolf and Wenche Eng family, who became his life-long friends and went on to host his daughter and many other ISS students over five decades. Doug’s experience with ISS shaped his values and steered him to become an educator.

As he got older, Doug took time to reflect on the significant influences Norway and Norwegians had on his life. “Beyond our experiences,” Warne said, “I wished for a way to expose others to such influences. Since I was an educator, it became my passion to do something it.” And so, he

has—by creating the Sons of Norway Foundation Warne-Eng Scholarship Fund, which provides funds for qualified applicants to attend educational institutions in Norway and helps defray costs of tuition, room and board.

Warne highly encourages people to pay it forward while they are still alive. “It’s exciting to witness the results now,” he says. “A great way to build an endowment fund,” he says, “is to include minimum withdrawals from one’s IRA. Along with IRA withdrawals, the endowment can be supplemented with gifts of appreciated stock, insurance and cash. The endowment will grow to the point where it eventually starts funding one’s passion. I highly recommend it.”

So, the next time you hear “The Scandinavian Hour” (or if you listen in for the first time!) Doug hopes you will think of how you can leave a legacy for good that reflects your passions, just like he did.

## Of the Sons of Norway Foundation’s total assets:

**\$5.2M** in named endowment funds started by members and their families

**\$230,000** in district-and lodge-specific funds

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# Mission Statement

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At the Sons of Norway Foundation, our mission is to share and preserve Nordic heritage, to positively affect our members' lives and to make Sons of Norway communities better places to live.

Since 1966, we have pursued this mission by supporting our members through scholarships and cultural exchange opportunities, providing disaster relief to members in need, and funding community programs that celebrate Norwegian heritage and culture.

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