



STARTING A NEW LODGE | ORGANIZING GUIDE

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

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 provide quality insurance and financial products to our members, promote and preserve the heritage and culture of Norway, and celebrate our relationship with other Nordic countries.

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, 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 to bring together a local community of Norwegian descendants and those who have an interest in Norwegian heritage and culture. Having Norwegian ancestry 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.

How to Start a Lodge

As the primary contact for the new lodge, we ask you work with the district president, vice president, zone director and financial benefits counselor (if one has been designated) to shepherd the new lodge through the steps of organizing. The Fraternal department at Sons of Norway Headquarters is also a valuable resource. Contact information 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, 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 the Fraternal department. You will be notified of the status of the new lodge by Fraternal.

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 required.

Step 2: Add Members

Once the lodge can accept members, Headquarters will inform you, and you can direct new members to join online on the website. Alternatively, they can print off a membership application from the website and mail it in along with their payment to our office.

Use the transfer form to submit all members that are transferring into the new lodge. Email to fraternal@sofn.com.

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 their current lodge.



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

- **Single Membership:** Anyone ages 16 and up who does not live or share a mailing address with another Sons of Norway member.
- **Family Membership:** Two or more adult 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 Fraternal for information about categories in Norway or Canada.)

New adult members can join the pending lodge online at www.sonsofnorway.com (preferred), mail in an application with payment, or hand in an application with payment at a lodge meeting to be forwarded along.

People who are already members of Sons of Norway can transfer into the pending lodge by completing a *Transfer Request Form* found on the website. If multiple members are requesting a transfer, the lodge officer can complete the form with all listed and send to fraternal@sofn.com.

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 usually starts 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.

Informational Meeting(s)

Interested 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?
- Do 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. 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

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 [IRS Apply for an Employer Identification Number \(EIN\) online](#) (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)

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 Fraternal 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, and Treasurer. Other offices that may be filled include Membership Secretary or Financial Secretary, Cultural Director, Editor, Publicity Director, Youth Director, Sports and Recreation Director, Counselor, Greeters, Marshals and Trustees. If you have any questions, please contact Fraternal.

Note: Before the institutional celebration, please check with members being considered 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 or your zone director 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
- Lodge bylaws are drafted and voted on. Use the template on the website in the governance section.

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 Fraternal 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, the entire amount of dues paid by new and transferred members for US lodges are returned to the lodge. After the first year, dues will be portioned out to International, District, and Lodge, as is the standard practice for all established lodges. The portion of lodges



dues is deposited directly into the lodge's bank account of choice. Make sure that you submit an ACH with your bank information and signer information to headquarters. These documents can be found on the website.

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 to start a lodge is you, the organizing representative. You plan and lead the first meetings and keep those involved on track throughout 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 of 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 (FBC)

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 procedures and lodge administration questions.



Fraternal Department

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, the fraternal team is an invaluable resource. Contact them at 800-945-8851 ext. 4659 or fraternal@sofn.com.

Foundation Director

The Sons of Norway Foundation is driven by our mission to celebrate Nordic culture and heritage through scholarships and grants to members and communities. Our Foundation Director is a great resource to learn more about these programs and how your lodge and members can be involved in giving. Contact them at foundation@sofn.com.

Interim Officers

- **Temporary Secretary**

One of the most important temporary officers is the secretary. They coordinate 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 fraternal 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 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.

Contact | Sons of Norway Headquarters

Mailing address: Sons of Norway | 1455 W. Lake St. | Minneapolis, MN 55408

Phone: 800-945-8851

Email: fraternal@sofn.com

Fax: 612-827-0658



NEW LODGE ORGANIZATION INQUIRY FORM

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 size of the city?

3. What is the estimated Norwegian and general Scandinavian population of the area?

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, positions, and contact information for any city or community leaders who are of Norwegian or Scandinavian background:

- _____
- _____
- _____

Necessary Considerations

1. Are there any other Norwegian or Scandinavian groups in the area that are currently in existence?

- _____
- _____
- _____

2. Briefly state the primary reason you want to form a new Sons of Norway lodge in the area:



3. List the names, phone numbers and emails of those interested in organizing a new lodge in this area:

- _____
- _____
- _____
- _____

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

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

- If yes, please give name and contact information:

6. Do you know if your state is licensed to sell Sons of Norway products? _____

- If yes, 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 and contact information with whom Headquarters should communicate.

Name: _____ Telephone: _____

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.

District President Name: _____ Signed: _____

Date: _____

District President - email this form to fraternal@sofn.com



**SONS of
NORWAY**

New Lodge Organization Checklist #1

Getting Started

This form should be used by the person interested in starting a new Sons of Norway lodge and organizing the effort.

- Have you identified a community for a new lodge? _____

Answer the questions below. These will help you and the District Vice President determine whether the community is appropriate for a new lodge.

- What is the overall size of the community? _____
- How large is the Norwegian community? _____
- How large is the Scandinavian community? _____
- Are there other groups similar to Sons of Norway in town? _____
- How close is the nearest Sons of Norway lodge? _____
- What lodge is it? _____
- How many members already live in the area? _____

Request a membership list from a district officer. These members are a good place to start when inviting people to an informational meeting.

- Does the community have a newspaper? _____
- If so, what is its circulation? _____

Things to Consider Before the Information Meeting

- Pick an appropriate location _____

Make sure your meeting place is somewhere everyone is familiar with and is easily accessible. Remember to pick a place everyone will feel comfortable with. For example, not everyone might feel comfortable at a senior center or church. Libraries, restaurants, and community centers all have potential meeting spaces.

- Pick an appropriate time _____

Is your time convenient for most people? Consider your target membership audience. A lunch meeting might be a good idea for some people, but it excludes everyone who works. Consider selecting an evening or weekend time.

- Plan an agenda _____



Try not to make it a 'meeting.' Make your informational meeting an interactive experience for members and guests. If you're able, consider something like an introductory Cultural Skills lesson to give guests a feel for one of the most popular benefits of membership.

Be informational, but not overwhelming. The process of starting a lodge can seem overwhelming to guests. Keep the informational meeting to information about Sons of Norway. There will be plenty of time to go over the process of starting a lodge with people who are committed.

- Invite members _____

Existing members are the best place to start when recruiting for a new lodge. Take the time to invite members personally with a phone call to the informational meeting, it will help the new lodge process run more smoothly.

- Invite nearby lodges _____

Leaders or members from nearby lodges are a great resource for starting a new lodge. They have experience in Sons of Norway and better understanding of tools and resources. They can be a great mentor for a new lodge on its path to institution.

- Develop an advertising plan _____

Notify local papers. Check with the local newspaper to see if they'd be willing to do a story about the possibility of a new lodge coming to town, especially if you're offering something interesting or unique at the meeting. The Lodge Publicity Toolkit in the members section can help you create a plan to connect with local media. Don't forget to utilize the community calendars in newspapers as well.

Contact local churches. Especially Lutheran churches – these can be a terrific way to reach a wider audience. Check into getting materials about informational meetings in church bulletins. Utilize bulletin boards in the community. If you have a contact in a community, ask if they'd be willing to hang flyers. They can be hung in libraries, restaurants, coffee shops and other strategic places in the community to raise awareness of an informational meeting. Don't forget to include meeting time, location and contact information. A sample flyer can be found in the members section of the Sons of Norway website under management.

Consider contacting local schools, especially if there is a college nearby. Community Centers and Libraries may also have spots to post fliers.

Look into other organizations. Are there other Norwegian or Scandinavian groups in the community? A local college with a Norwegian or Scandinavian studies program? Reach out to them and invite them to the informational meeting.

- Order supplies from the Lodge Supply Store and prepare printed materials _____



Check the Sons of Norway Store and Lodge Supply Store to see if there are items that can be ordered for giveaways. The website also has materials available for printing. Consider including the History of Sons of Norway from the Info Bank Units in the members section of the Sons of Norway website.

- Request/complete the *New Lodge Organization Inquiry* form _____

This is a mandatory form. A new lodge will not receive a member number until this form is completed and sent to Sons of Norway Headquarters. Fortunately, many of the questions you answered before getting started will help you complete the form.

Planning the Informational Meeting

- Draw attention to the meeting space _____

If you're able, do something outside the meeting space to draw attention to it being the location of the informational meeting such as a banner, balloons or signs.

- Have a signup sheet _____

Encourage all guests to sign in and provide a telephone number and/or email address regardless of whether they sign up or not. This will provide you with a base of interested community members. Also, consider having business cards available by sign up so they can reach out themselves.

- Create a welcoming space _____

Be sure to appoint a greeter to welcome guests as they arrive at the meeting.

- Create a leadership group _____

This group will work to increase awareness and interest in the community for the new lodge through programming, advertising and event opportunities. Having at least 2 or 3 interested people will help ensure the work is spread evenly and progress can be made. Be sure to share their contact information with the Fraternal department so we can share resources with these leaders. If members from nearby lodges attend, invite one of them to lend a hand to this committee.

After the Informational Meeting

- Schedule another meeting _____

Don't lose momentum! Keep everyone excited by scheduling regular meetings to keep everyone motivated and informed about the new lodge's progress!

- Contact guests _____



Follow up with a thank you to guests. Even if they did not sign up, it is important to call guests and thank them for attending the informational meeting. Consider additional forms of communication as part of follow up, including email, text, and written.

- Follow up with leadership group _____

Again – keep the motivation going!



**SONS of
NORWAY**

New Lodge Organization Checklist #2

Getting Started

This checklist can be used by the District President and Primary Contact to track progress of the formation of a new lodge. It should be used once the new *Lodge Organization Inquiry* form has been completed and approved by the District President and Sons of Norway headquarters.

- ☐ Inquiry has been made for new lodge and referred to District President
 - Primary Contact Name: _____
 - Contact Email and Phone: _____
- ☐ District President scheduled initial meeting and reviewed process with Primary Contact, using *Starting a New Lodge Guide*
- ☐ District President received completed *New Lodge Organization Inquiry* Form
 - Date: _____
- ☐ Proposed lodge meets required number of 25 adult member minimum
- ☐ District President ___ **Approves** or ___ **Denies** the request
 - Date: _____
 - Reason: _____
- ☐ District President emailed form to HQ (fraternal@sofn.com)
 - Date: _____
- ☐ HQ assigned lodge temporary name and lodge number
 - _____ - _____
- ☐ Primary Contact mails membership applications with payment and/or emails transfer form(s) to HQ (fraternal@sofn.com) (*as needed*)
- ☐ Informational meeting held
 - Date: _____
- ☐ Organizational meeting(s) held
 - Date(s): _____
 - Temp officers elected
 - Names for lodge discussed
 - Meeting location and times considered



- Institutional Meeting scheduled Date: _____
- ☐ Then, elected lodge treasurer
 - Applies for EIN (Employer Identification Number)
 - Establishes lodge bank account
- ☐ Planning for the Institutional Meeting
 - Committees established – arrangement, publicity, nominations, member recruitment, other
- ☐ Institutional Meeting
 - Date: _____
 - Officer elections & installations done
 - New lodge name voted on & approved
 - Lodge bylaws drafted, voted on and submitted to HQ for approval (fraternal@sofn.com)
 - Vote to determine how long charter will be open
 - **60 or 90** days
- ☐ Charter Meeting
 - Date: _____ (should be 60 or 90 days from the Institutional Meeting)
 - Lodge secretary contacts Fraternal two weeks prior to meeting date to prepare charter
- ☐ Lodge Finances
 - Escrow account funds given to lodge
- ☐ FBC identified
 - Name/contact: _____

Notes:



Transfer Request Form

This form is to request a transfer of Sons of Norway membership from one lodge to another.

Please check all that apply:

- ☐ I am requesting my individual membership be transferred
- ☐ I am requesting all those under my family membership be transferred
- ☐ I am requesting multiple members of a lodge be transferred

Reason:

Member Name & Number: _____ 9 _____

Current Lodge Name & Number: _____ - _____

New Lodge Name & Number: _____ - _____

Membership Names and Numbers of all others that request transfer:

[illegible]



*Please note that if you are requesting to transfer into a voting lodge, this form needs to be signed and approved by a lodge officer. Requests for voting lodges will not be processed without approval.

For lodges that require a vote for membership and transfer:

☐ I attest that the above listed Member(s) have been voted on and approved for transfer into the lodge.

Lodge Name and Number: _____ - _____

Officer Name and Membership Number: _____