

Website: Task Force Call- August 5, 2023 Notes

Darlene reviewed where to find Task Force documents and resources.

Review resources that were available for members to use

- District Five Website-
https://sonsofnorway5.com/board_of_directors/directors_messages.php
- PowerPoint
- Handout
- YouTube video-(36 views as of Tuesday morning) -
<https://youtu.be/UGv876RhKJM>

Sub-Committee Reports

Population and membership- using maps and membership lists to get a geographical and membership numbers view of our District.

| | | | |
|------|---------|------------|----|
| JUDY | GHAstin | Appleton | WI |
| JIM | HERMAN | Cincinnati | OH |

They reviewed the surveys and found there wasn't interest in keeping the zones as they are. They worked on some options of having 3, 4 or 5 zones- if we kept the zone system. They put together maps based on population and then others on number of lodges. The reality is that Wisconsin has 2/3 of the lodges in the District.

5 zones, based on population

Members:

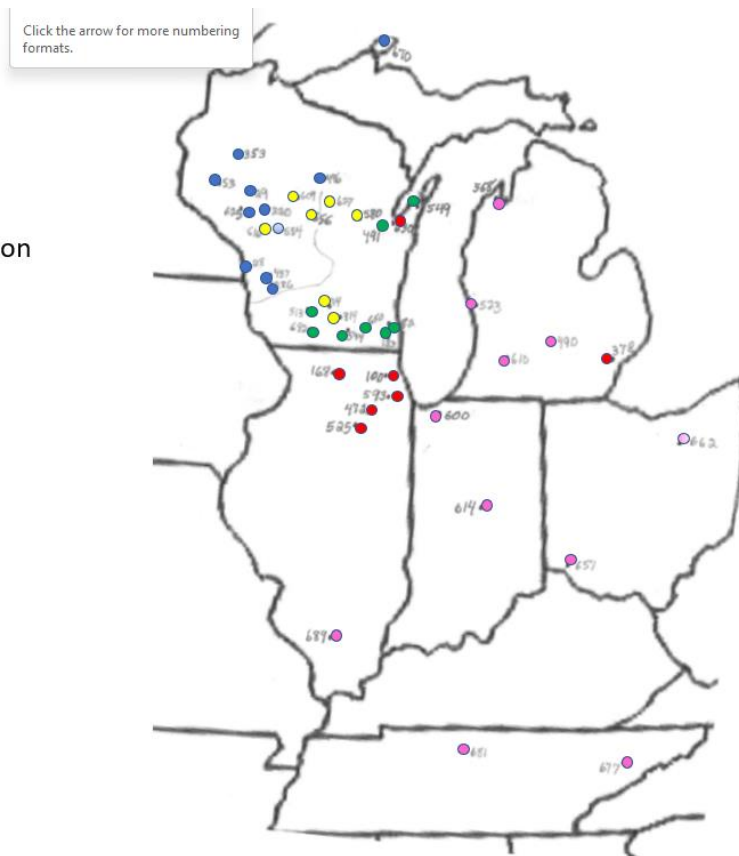
Blue-639

Yellow-563

Green-683

Red-616

Pink-600



A map of the Great Lakes region showing sampling locations for the 1992-1993 season. The map includes the Great Lakes (Superior, Michigan, Huron, Erie, Ontario) and the surrounding land areas. Blue dots represent locations where the fish was collected, and yellow dots represent locations where it was sighted. The map shows a high density of collection points in the western part of the Great Lakes, particularly in Lake Superior and Lake Michigan. Sighting points are more scattered, with a notable cluster in Lake Huron and Lake Erie. The map also shows the boundaries of the Great Lakes and the surrounding land areas.

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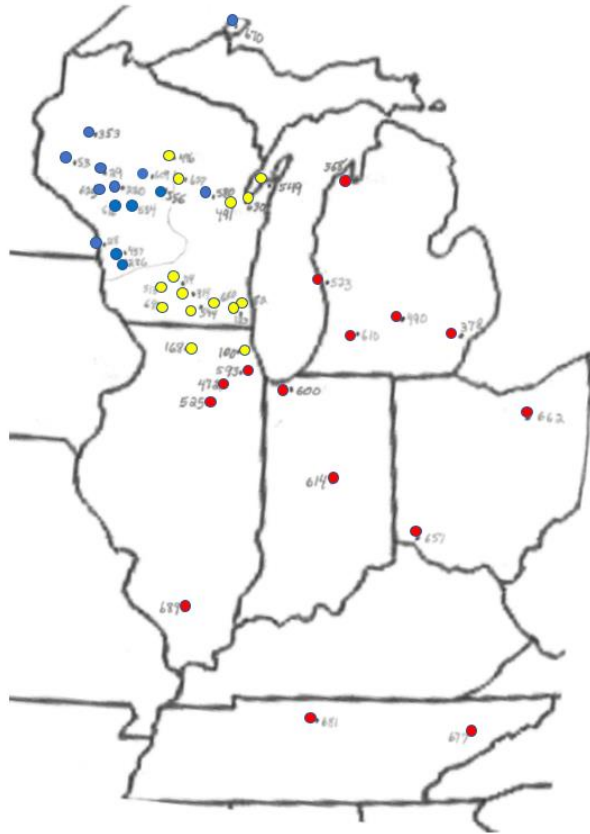
3 zones, based on # of lodges

Members:

Blue: 728

Yellow: 1226

Red: 1147



4 zones, based on # of lodges

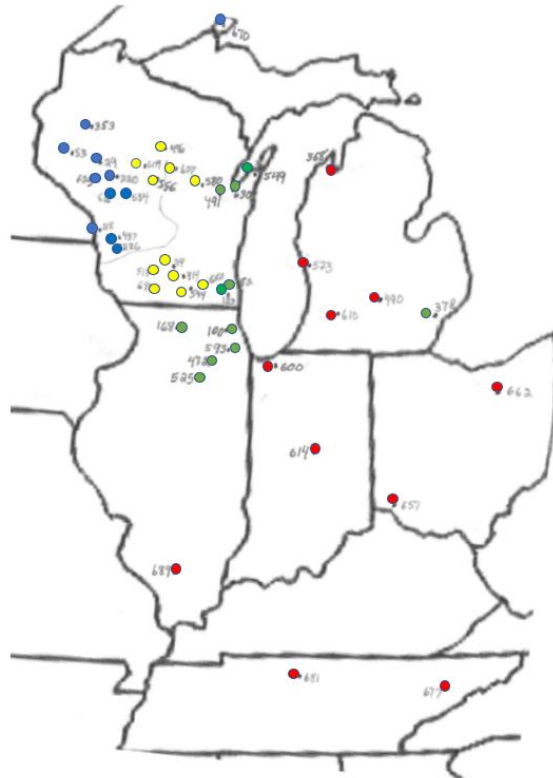
Members:

Blue: 639

Yellow: 841

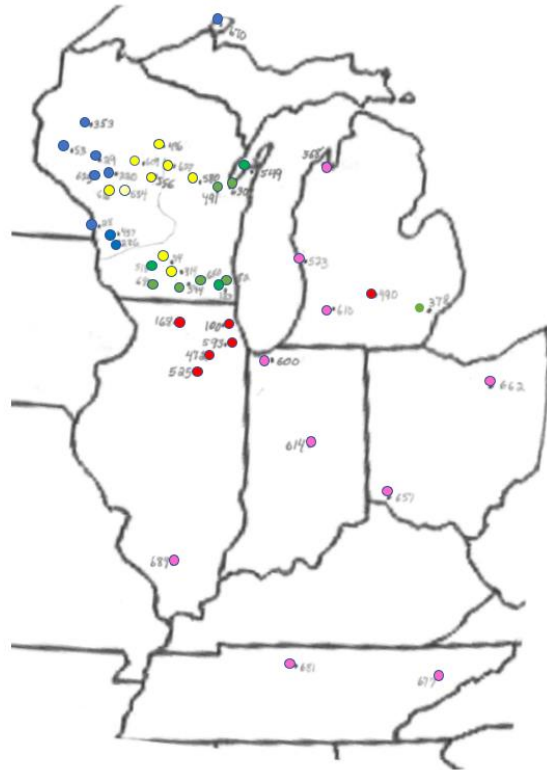
Green: 1021

Red: 600



5 zones, based on # of lodges

Members:
 Blue: 570
 Yellow: 632
 Green: 891
 Red: 478
 Pink: 530



Role of the Board- Board Structure- What do board members do? What can be done virtual vs. in-person? Role of the various board members and officers.

| | | | |
|--------|-----------|------------|----|
| CLARK | BREKKE | Farragut | TN |
| ESTHER | CHARLETON | Cincinnati | OH |

Note: Their report came in two parts and from each individual’s perspective. It is not a joint conclusion- but both of their personal opinions.

Personal Evaluations and Report by Clark Brekke
 of the SofN District 5 Special Task Force Subcommittee
 on Zone Alignments and Lodge Development & Support

For several reasons, including recent difficulties in finding qualified and willing volunteers to run for District 5 Zone Directors, a Task Force was established to evaluate several of these issues within the district. The Task Force developed and distributed to its members a questionnaire to help identify relevant information about these issues. Three subcommittees were established to review and summarize the input resulting from these questionnaires. This report is that summary from one of a subcommittee’s members.

Background Information and Perspective

Essentially, the key question for the Task Force

and, therefore, Zone Directors, as part of the Board structure—"Does District 5 need zones and, therefore, zone directors as part of the Board structure?" In the view of this subcommittee member,

the answer is that there is little compelling reason for zones. However, the Board and District membership may recommend to continue zones as part of the district structure, but, hopefully, this present critique should result in improvement of their role within the zone's management and district governance.

For the purposes of discussion within this report,

it will be approached from the viewpoint that the zone requirement will be dropped from the district's structure. As a result, some aspects of district governance and activities will need to be evaluated, and changes in operations will have to be studied and tweaked where necessary. A good example of this is an improvement in the thoroughness of communication will need to be done and modifications in procedures made as needed. Presently, the documents which were supplied to Task Force members make it clear that zones are geographical-based, and it is stated that they exist for "administrative purposes", without defining what these purposes are. Regarding receiving more input from members and lodges, it may be useful for the district to develop Power Point-like presentations that Board members and/or lodges can use in place of in-person lodge presentations by no-longer-present lodge Zone Directors but that other SofN members can use for facilitating information presentation. The district could also develop a program that lodge members or Board members could use in giving presentations. For these helpful materials, no zone structure would be required. Communication between and among the district Board and local lodges could also be improved.

Survey Results -- Are we locked into having zones?

Figure 1 –

If zones were no longer to exist, this figure (Board membership) would no longer apply. Instead, a determination would have to be made as to the size of the Board membership. Other than the 'titled' directors (officers), these directors could be named 'Directors at Large', and they would be appointed/elected from the overall District 5 membership. Other than requiring being an insurance holder/purchaser and selecting only one member from each local lodge, no other limitations need be placed on these selected directors. No alternatives would need to be selected, although the Board could be set up that way.

Figure 2

The recommendation to eliminate zones is partially addressed in this figure, listing the roles played by the current Zone Director positions. First, is the reader to assume that this listing is complete regarding Zone Director roles and responsibilities? If so, several questions can be asked about the need for zones and their directors. For example, a visit once a year may be desirable, but is it necessary, that is, what is the purpose of these visits? What is the purpose of hosting meetings or events? Can this be organized and presented electronically district-wide rather than just for a single zone (and impact in cost in terms of time, travel expense, efficiency, manpower)? Might not regular communications listed suffice rather than in-person? Is there another alternative delivery method/system to assist with forms and filings?

Figure 3

The question should be asked why zones are needed to facilitate connections with other lodges. Shouldn't the goal or opportunity exist of cooperation with other lodges regardless of zones? Greater use of electronic outreach to other lodges would encourage and facilitate such collaboration. (also see Survey Question 2 summary – Chart 2)

Chart 1

About half of survey respondents indicated a desire for local lodge visits by the one Director and 35% indicated the expectation of 'In-person visits', indicating a possible double counting of visitation expectation. In addition, unfortunately no information is provided by survey results as not the reason/expectations associated with these visits. And 45% of respondents want the Director to hold zone meetings or events (why does this require a visit?). Were these activities provided by the district electronically, it would be more efficient (and effective?) for lodges throughout the district rather than limited to a few lodges or to a specific district. The nearly 70% response indicating a need for timely and excellent communication, which includes electronic means, indicates communication as the most important criterion and need to local lodges. Regarding 'Regular Communications' and 'Assistance with forms', that information could probably be provided electronically or by phone rather than by a Zone Director.

Chart 2

Only 15% of survey respondents indicated that their local lodge participates in joint activities with other zone lodges whereas more than half the lodges never or seldom have joint activities within a zone, indicating that zone promotion of joint activities is lacking or is not working -- another indication that zones are not particularly effective in this regard. And 20% of respondents would like to see more social or cultural activities within a zone. Why limit that increase to zones only, but rather open up that opportunity to lodges in the entire district?

Chart 3

If zones were to be eliminated, distance would not matter if available on an electronic basis. The district could develop other means to accomplish this, including electronic, with 65% of respondents requesting a virtual platform as the delivery method. This was suggested to be done at least once a year.

Chart 4

Only 8% of survey respondents want to leave the zones as they are, indicating broad dissatisfaction with the present zone set-up, whereas 45% indicate that other zone maps should be considered and 26% do not think we need zones.

Chart 5

Though useful for what it illustrates, this chart becomes irrelevant if zones are eliminated from district governing structure.

Brief Summary by Esther Charlton

Esther Charlton's comments

We recommend to abolish zones. All communication can be done virtually.

The only reason for a lodge visit would be something really special like a 25th or 50th anniversary.

District Board

President

Vice President

Secretary

Treasurer

Youth Director

Sports Director

Publicity Director

Cultural Director

All of the above would be responsible for their own lodges and a director would not be assigned to them

Director

Director

Director

Director

These four directors would be at large from the entire district.

The remaining lodges would be split up among them.

Discussion after their report:

What kind of support does the District give to lodges? We have to remember that not all survey responders wanted to dissolve the zones. If we dissolved the zones, what changes would be made at convention? Some feel zones do connect the lodges. We are fortunate that we have a weekly communication from our District to lodges (FFFN) as some districts only do newsletters 2-3/year. The zone directors are the middle link between the District and lodge.

Current ways to support lodges- what can we do in the meantime to support lodges?

| | | | |
|-----------------|----------|-----------|----|
| DARLENE | ARNESON | Stoughton | WI |
| DAVID & RUTH | AMUNDSON | Westby | WI |

Current ways to support lodges- what can we do in the meantime to support lodges?

| | | | | | |
|--------------|----------|-----------|----|---|--|
| DARLENE | ARNESON | Stoughton | WI | 608-514-4951 | -arnesonfamily5@gmail.com |
| DAVID & RUTH | AMUNDSON | Westby | WI | 608-634-3034 Ruth's cell 608-606-4667 | nissedal@mwt.net |

Survey areas to ask lodge members:

- What would you personally miss if the lodge you belong to would dissolve?
- How long have you been a member at your lodge?
- Have you belonged to more than one lodge? If so, why and how long at each?
- Who recruited you to become a lodge member?
- What convinced you to join your lodge?
- List all the activities you have participated in at your lodge and why?
(attending certainly does count!)
- Describe your lodge in 5 words.
- What 3 reasons would you use to recruit new lodge members?
- What are 5 things you'd change with your lodge?
- What are 5 things you really like or enjoy about your lodge?
- What do you see as reasons for others to join your lodge?

Do Total Lodge Profile (aka "who are we?")

- Current number
- Gender
- Ages
- Connection with Norway
- Years as a member at your current lodge
- Family
- Family connected to Norway in any way
- Other

Misc. points:

- Some lodges may not see any changes needed (+/-) changes

Things to try:

- Look at all ways to advertise what your lodge does..
- Classes of all interests, not just Norwegian related
- Family Mini Camp
- Learn about and access other lodge success
- Arrange to have 1 or 2 lodges become "sister or brother" lodges
(ideas from "sister city" concept)
- Do the "Healthy Lodge" check list

Challenges that lodges face

- Why do we need help? Happy with the level of activity that we are at. Complacent at best.
- Try to organize activities but lodges don't see enthusiasm for being involved.

- Some members don't really travel a lot and happy to be involved in the local lodges, have coffee, enjoy a program, work at Syttende Mai, and then be done for the year.
- What would life be like without Sons of Norway? Ask them!
- Lodge visits- need to come across as an average person. Not "we're here to help you".
- Suggest activities and get no response or they don't come to programs- but the public does
- Officer elections and getting nominating committees working

Ways to find out what works for others

- What can we learn from other lodges that can bring back some enthusiasm. Round table discussion on topics of interest to lodge leaders.
- Help publicizing events- what do other lodges do to promote their programs, lodges, and activities?
- Helping lodges do a survey- why did their members join? What do they want from their membership? What are they interested in? What challenges do they face – driving, no computer...
- Can we develop a form that collect success stories and then share them online and to lodges.
- Monthly forums or calls that share ideas on issues, activities, or challenges lodges are facing?
- The priority is more on getting activities from others. Promote looking at the District website and Facebook page to see what others are doing.
- Website – remind members how to log in to see what's in the Members Only sections.
- YouTube video on how to log in and other related topics
- Share lodge contacts to get more information on successful programs

Things that might work and help a lodge

- Skill sets- people feel encouraged when they feel comfortable. Do they feel trained for their office?
- Small group involvement- you don't need to have everyone at all activities. If 3-5 members enjoy a book club, walking, knitting together- that is fine!
- Sister lodges- a way to network and work together. It might be 3-4 lodges together.
- Officer training- some know their duties and many don't. Have calls or meetings to review duties, where to get help, and requirements of that officer position.
- Healthy Lodge Checklist- promote use of this to lodges. (see form at end of report)
- Adopt a School – invite the parents to lodge activities when their kids are involved in SN. Send home information about the lodge with the students.
- Round table with leadership such as International board and District Board members to learn what's going on.

Healthy Lodge Checklist

Promotion and Recruitment

How your lodge promotes itself can have a significant impact on recruitment. Ask yourself - how many of these activities has your lodge participated in?

- ☐ Did your lodge participate in a parade or public festival?
- ☐ Does your lodge have a newsletter that is distributed at least 6 times per year?
- ☐ Does your lodge have an up-to-date website or Facebook page?
- ☐ Did your lodge establish recruitment goals for the year?
- ☐ Did your lodge have information for potential members at every meeting?
- ☐ Did your lodge organize at least 1 special event open to the public during the year (*lutefisk dinner, cultural festival, etc.*)?
- ☐ Did your lodge recognize those who recruited new members?
- ☐ Did your lodge advertise or was it featured in local media (*advertising or news*)?
- ☐ Did your lodge have a membership committee that met at least 3 times per year?
- ☐ Did your lodge create a welcoming environment for guests and new members by having greeters or members of a welcoming committee at every meeting and event?

Member Experience

Meeting the expectations for members means they're more likely to renew their memberships. Not only do satisfied members keep their memberships, they are more likely to bring friends and family into Sons of Norway. With that in mind, how is your lodge enhancing the member experience?

- ☐ Did your lodge participate in at least 1 community service activity during the year (*activities done on behalf of Sons of Norway that assist the needy or improve your community*)?
- ☐ Did your lodge offer at least 1 special interest group or cultural class during the year that met on a regular basis for multiple sessions (*book club, Norwegian language, cooking, hardanger, knitting, etc.*)?
- ☐ Did your lodge offer culturally focused lodge programs during the year?
- ☐ Did your lodge utilize a member satisfaction?
- ☐ Did your lodge provide a calendar of meetings and events for members?
- ☐ Did your lodge collaborate with another organization or lodge for a program, activity or community service project?

Administration

A strong lodge starts with strong leadership. Great leaders can have a significant impact on the experience of Sons of Norway members. Does your lodge meet all the suggestions below?

- ☐ Did your lodge hold at least 8 meetings per year (*excluding executive/board meetings*)?
- ☐ Did your lodge hold separate business and social meetings?
- ☐ Did your lodge file officer changes (D63) by December 15?
- ☐ Did your lodge use FraternalsGive to record community and fraternal events?
- ☐ Did your lodge submit your D17 by March 1 *of the previous year*?
- ☐ Did your lodge have at least 3 officers who utilized the officer resources on the Sons of Norway website?
- ☐ Did your lodge prepare and utilize an annual budget?
- ☐ Did your lodge submit photos to your district publicity director for inclusion in Viking magazine?
- ☐ Did your lodge send delegates to your last district convention?

Promoting the mission

As a fraternal life insurance company, profits from Sons of Norway's outstanding financial products go back into lodges throughout the organization. This provides a valuable benefit for lodges. How is your lodge promoting Sons of Norway's financial products?

- ☐ During the year did your lodge discuss the role that the three operational areas play in supporting the mission of Sons of Norway?
- ☐ Did your lodge have a New Member Dinner, with support from the Marketing Department?
- ☐ Has at least one member of your lodge purchased a Sons of Norway financial product during the year?
- ☐ Has your lodge shared information about Sons of Norway's message in your lodge newsletter or on your webpage?
- ☐ Do you have members who own a Sons of Norway financial product?

Foundation

The Sons of Norway Foundation is the giving arm of the organization, providing valuable funds for members, lodges and communities alike. The great work of the Foundation is due in large part to the work of the lodges. Is your lodge helping support the Foundation?

- ☐ Did your lodge have a Foundation Director?
- ☐ Did your lodge hold a fundraising event for the Sons of Norway Foundation (*proceeds going to the Foundation*)?
- ☐ Did your lodge have at least 1 article in your lodge newsletter promoting the Sons of Norway Foundation?
- ☐ Did your lodge participate in Sons of Norway Foundation initiatives such as Foundation month?
- ☐ Did your lodge make members aware of scholarship and grant deadlines?

Moving forward:

- We feel it's important to find out that if the District lodge approves a bylaw change, how fast will International act to approve it? Robin Fossum emailed Mark Agerter to find out.
- We need to develop a Pros and Cons of what zones provide. The feedback will come from the board and task force members. Darlene will put together a survey to do that.
- We want to have a bylaw proposal sent to the 2022 delegates no later than the end of December with ballots due in January. Then send to International for approval.
- Utilize the Healthy Lodge Checklist with lodges to help them in the interim on what they do well and where they want help.
- Do the zones really restrict us? Some feel that if they aren't in the same zone, they can't do things with lodges in other lodges. So maybe that's an issue.
- Where does strategic planning fall into this?
- Does this affect convention attendance or planning? We didn't think so.
- Next call will be on August 26 at 9:00 AM CST.

**The next Task Force Call will be: Saturday,
August 26 at 9:00 AM CST.**