

Friendly Fifth Friday News March 31, 2023

Send all web posting info and calendar dates/events directly to our webmaster at inputd5@sonsofnorway5.com. Feel free to share this with your lodge members!

Sons of Norway vs. Sons of Norway Foundation

-Sons of Norway Fraternal Benefit Society is a 501(c)(8) NOT FOR PROFIT insurance company. Not-for-profit organizations are not subject to state or federal income taxes; however, if they own property, they are subject to local property taxes.

- **Donations to Sons of Norway lodges are NOT tax-deductible**

-Sons of Norway Foundation is a 501(c)(3) NON-PROFIT charitable organization that supports our lodges and members through grants and scholarships

- **Donations to the Sons of Norway Foundation ARE tax deductible.**

Since 1966, staying true to its mission, the Foundation has supported our lodges and members in three ways

- **GRANTS** for lodges, community partners and members in need
- **SCHOLARSHIPS** for post-secondary education and cross-cultural exchanges
- **HELPING YOU ACHIEVE YOUR PHILANTHROPIC GOALS** by providing the opportunity to incorporate your interests in passions in your annual and legacy giving

Visit www.SonsofNorway.com/Foundation to learn about the 15 different scholarships and 6 grants we offer and find the link to apply online

-Donations from Lodges & Districts are critical to the Foundation's success.

-Lodges and Districts can also use the Foundation to administer their scholarships.

-D2, D4, D6, and the Desert Fjord lodge invested their funds with the foundation, earning more interest than in a standard checking account

We want the Sons of Norway Foundation to be the first organization that members, lodges and others who care about Nordic heritage, culture and education think about when they consider a gift.

From Publicity Director LaVonne Wier-

Photo submissions should reach me at this e-mail address by April 5th.

I am still receiving photos without the photo submission form. Giving me a detailed explanation of the photo in an e-mail doesn't replace the needed form. Sorry! I can't send in the photo without the accompanying photo submission form that is required by headquarters. Use the form found at https://sonsofnorway5.com/publicity_director_messages/ when you submit your photos!

Is spring just around the corner? I hope so!

LaVonne Wier
D5 Publicity

District 5 Special Task Force Meeting Notes- March 4, 2023

There were 40 unique callers on the ZOOM call but some had 2 people from the same device.

President Cheryl Wille-Schlesser welcomed everyone to the call and thanked them for taking time to participate. She gave a recap of the recent Barnebirkie event and thanked all who sent cookies, financial support, or who volunteered at the event.

Cheryl also explained that she would like all lodges to send her a copy of their D17 and 990's confirmation so that we can help insure that all lodges are getting their required reports in. She also explained that we have many new policies and procedures from International, the new Lodge Bylaw Template, ways to post events on the websites, the map and lodge directory is back on the international website, and encouraged lodges to get their FraternalGives filed, and to complete Lodge Achievement and Family Lodge of the Year forms.

Cheryl introduced Duane Kittleson, International Director, who will lead this first task force call. Duane gave some background on the challenges our current zones and bylaws give us in trying to fill our Board of Director positions. The Nominating Committees during the past several biennium's have really struggled to have enough benefit members to approach for service. Many delegates who are elected to represent their lodges are not benefit members. We have been given the okay that delegates from Michigan and Tennessee do not have to be benefit members as Sons of Norway is not licensed to sell product in those states.

The District currently has a bylaw proposal to the 2022 District Lodge Delegates to address the current challenge of one zone having more than two people and a board member who was willing to serve a third consecutive term. Ballots are due March 10 to District Secretary Darlene Arneson.

Duane shared a PowerPoint and many statistics in regard to our benefit/non benefit members, ages of our membership, and details on the Central and Spirit of the New Century Lodges. He then reviewed the Duties of the District Board and the purpose of the zones. He reviewed maps of the current District and then shared several options if the zone lines were changed.

Other options that can be explored during the task force process include changing zone lines, officers who don't have zone responsibilities, and removing the benefit product requirement to serve on the board.

The participants in the call began discussion. Examples of how our Upper Michigan lodge's location is closer to Wisconsin than lower Michigan gives challenges to be a part of either. Another shared their struggle to find products that appeal to our membership- either members already have the investment products they need or younger people are looking for products other than what SN offers.

There was a lot of discussion on why benefit members can serve on the District Board when they really don't have any say in financial products for the organization. Should that requirement be only for International Board members? Duane was going to check with international on that.

Discussion about the changes in Sons of Norway on the international level and how that affects Districts led to questions of what other changes might be coming? Will Districts stay the same? When rezoning, should population as well as geography be considered. All Districts are struggling with this issue and the desire to have all parts of their Districts represented on their boards but having the same struggles in getting zone directors.

There was discussion about SN being an insurance vs an investment organization. As an insurance company, they can't offer some of the products that members want or that might add to our "mature" member's portfolios as we must follow the State of Minnesota Insurance Commissioner's rules and oversight. Some shared that others (i.e. Cuna) did a split and how might SN consider shifting away from the fraternal model? The impact of losing the financial support from the insurance part is a huge consideration in anything like that?

There was discussion about taking away all zones. Would that work to have all at-large elections?

The group discussed ways to promote insurance sales and products. There was also questions about what products Central Lodge members are buying that has caused that lodge to have huge membership gains- why aren't local lodge members buying those same products?

As the call ended, Duane asked if someone would like to serve as the moderator for future calls. The Lodge Development and Zone Alignment Committee (chr. Darlene Arneson, Connie Kross, Judy Ghastin and Bill Bultinck) will assume leadership for the task force and Duane will remain involved. No volunteers came forward.

As the call concluded, the group discussed having the zone directors gather input from their assigned lodges, send out the notes in the FFFN along with the PowerPoint, and to look at past survey's for possibly doing another survey.

Notes taken by Darlene Arneson

The following PowerPoint was prepared by Duane Kittleson for the Task Force Meeting.

District 5 Task Force



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Why does this task force exist?

- District nominating committee experienced extreme difficulty in finding eligible and willing candidates for district officer and zone director positions for the 2022 district lodge meeting held last June in Middleton, WI.
- Many local lodges elected delegates which were not benefit members which put limits on the possible candidates within a particular zone.
- The nominating committee requested a resolution be put on the floor of the district lodge meeting to pursue ideas and options to assist in the selection of future candidates for the district board of director (BOD)

The resolution #2 as approved by the 2022 District 5 Lodge Meeting is as follows:

THEREFORE, be it resolved that the 2022-2024 District President shall appoint a Special Committee consisting of but not limited to current District Board members, past District Board members and District Members at large. The committee shall meet during the next biennium and present a recommendation of proposed solutions at the District Lodge meeting in June 2024. The Task Force should include diversification of selected appointees to include past, present, younger, older, different genders and from distant geographical areas that includes a more all-inclusive demographic appointee (s).



• Purpose of SON District

- The district lodge shall promote the interests of SON within the district and shall cooperate with and assist the local lodges and its officers and directors in their work, both relation to fraternal activities and organization work.
- SON lodges are divided into geographical districts, each of which are assigned local lodges.
- District lodges contain at least 3,000 members.
- District lodges may be further divided into several geographical **zones** for administrative purposes.
- District board of directors (BOD) are responsible for assisting local lodges and its members.

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District 5 - As of Jan 26, 2023

		% of Total
Number insured (Benefit)	457	16%
Life Members (not Insured)	1	
Golden Members (insured & not)	394	14%
JV (UngerVenner ?) all insured	43	
Golden Members Insured	122	4%
Members Other (not Life, Golden or JV)	2,428	
Total Members in Lodges (ages 18-89)	2,866	

Slide 3

DK0 Fraternal activities are the lodge programing activities, cultural events

Duane Kittleson, 2023-02-03T22:05:34.238

DK1 Organization work covers the paper work such as reports required by the H.O.

Duane Kittleson, 2023-02-03T22:06:43.904

		% total (incl 90+)	
Median Age	71		
Average Age	66		
Members Age 18-30	236	8%	
Members Age 31-49	219	7%	
Members Age 50-89	2,411	79%	
Members Age 90+ (Not counted above) (In lodges not 0 & 999)	201	7%	
Members Age 0-17 (not counted above)	633		
Members in lodge 0 & 999	3,632		
Total District 5 members	7,332		

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Members Age 90+ in District 5

Member Type	Count
Regular	126
Golden	74
Life	55
New Golden	<u>15</u>
Grand Total	270

How do SON members become district board members?

1. Local lodges elect delegates to a district lodge meeting each even numbered year. The number of delegates is determined by the count of members in the local lodge.
2. At the district lodge meeting the district officers and zone directors are elected from those delegates who own a SON life insurance or an annuity product referred to as a benefit member. (States of Michigan and Tennessee delegates do not have to own a product to be eligible)
3. The zone director election is done within the zone caucus meeting. Thus only benefit members within their zone are eligible to be elected from that zone. Current bylaws provide for two (2) zone directors from each zone.

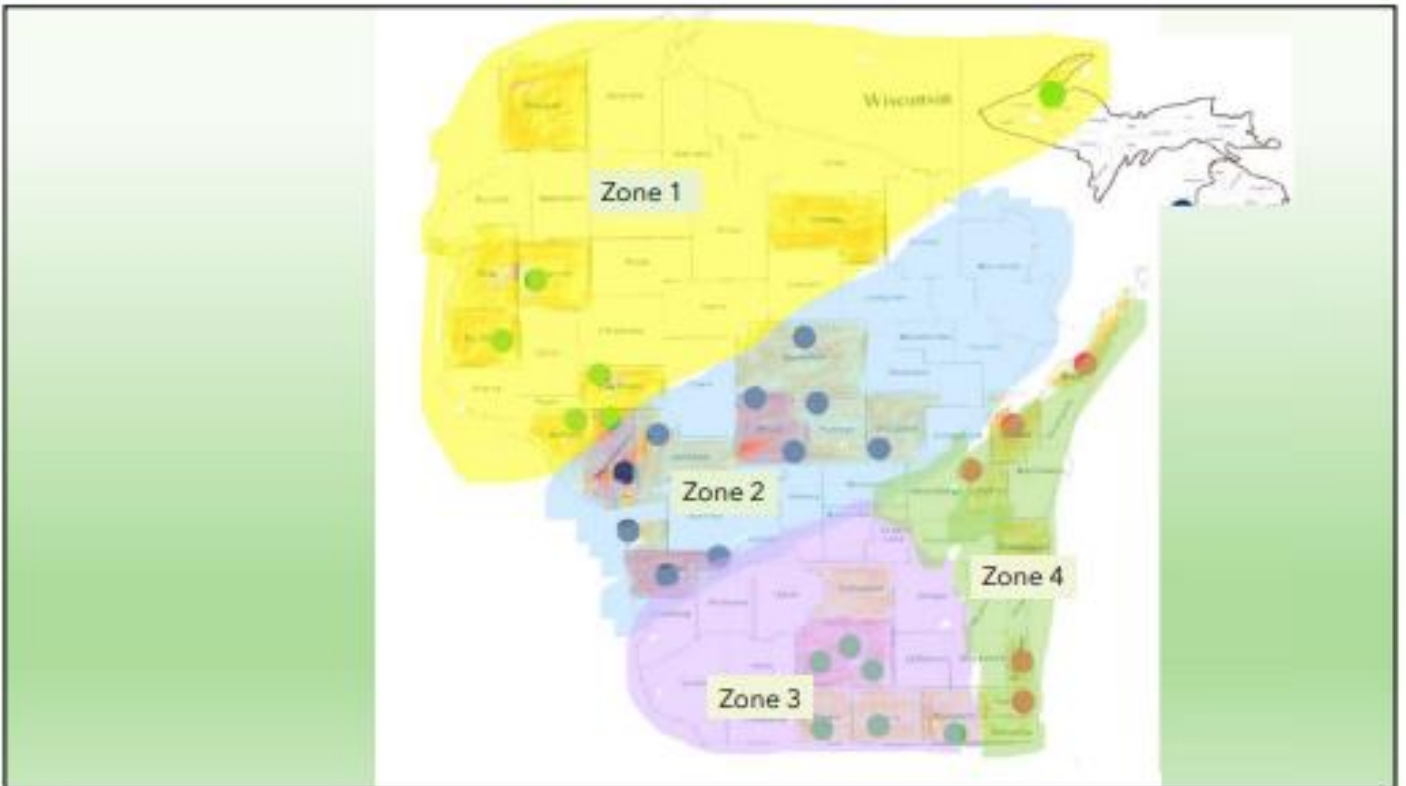
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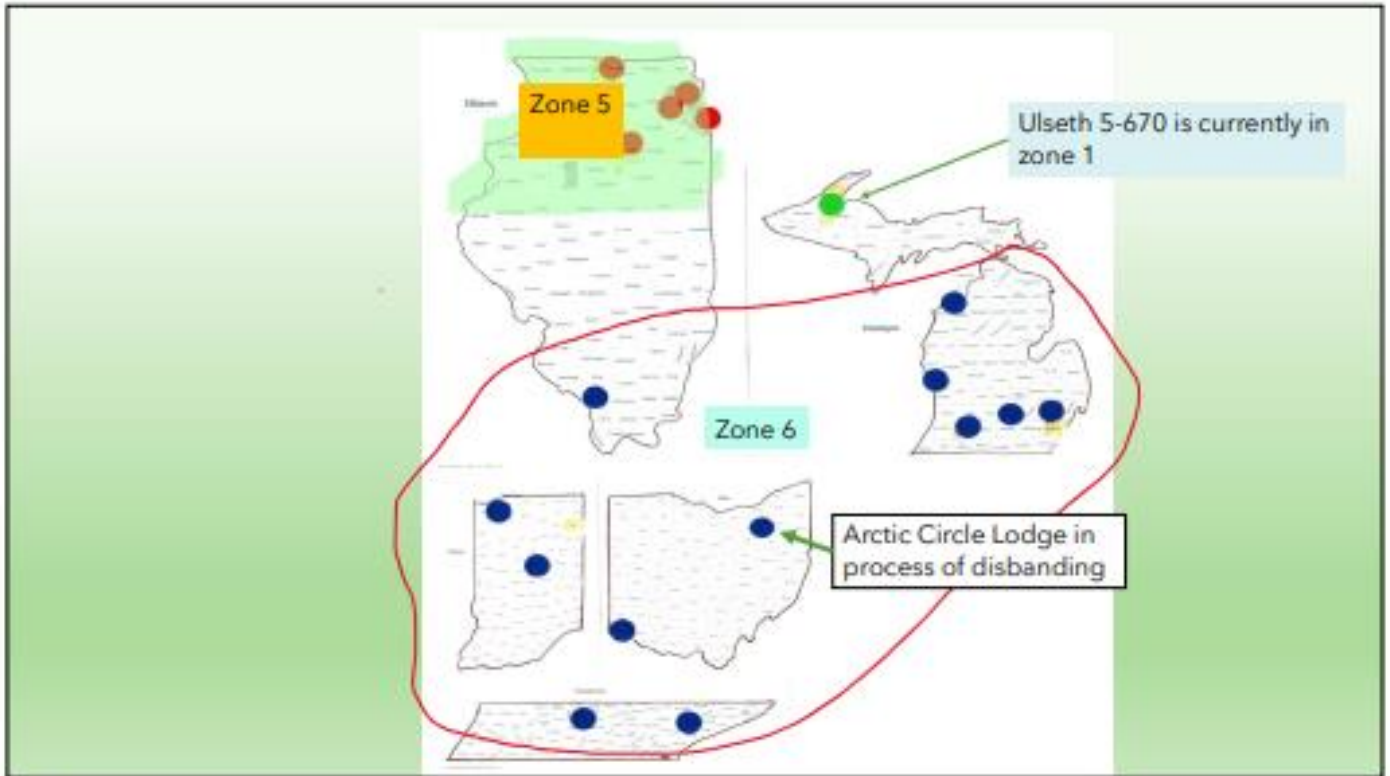
How does the District Board do its job?

- Board members are assigned by the district president to mentor local lodges in their vicinity (within a **ZONE**)
 - Visit lodges
 - Attend lodge events
 - Be available to help with questions from members
 - Provide leadership training
- Board members serve in officer positions such as president, vice president, secretary, treasurer, youth director, publicity director, cultural director and sports & recreation director.
- Currently district 5 has six (6) zones. There are two BOD members assigned to each zone which are referred to as zone directors. The zone directors may also hold an officer position which require additional duties for the district in general.



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What if

- **The number of Zones would be reduced?**
 - East Wisconsin
 - West Wisconsin
 - North IL & IN
 - All Michigan
 - South IL, Southwest Ohio and TN
- **More of the officer positions were relieved from zone director responsibilities?**
 - President, VP, Secretary, Treasurer & Youth Director all at large with no zone responsibilities
 - Cultural, Publicity, and Sports & Recreation Directors retain zone responsibilities.
- **Benefit member status could be eliminated for all District Board members?**

Some Potential Zone alignments

Remember currently the District Board is a total of 14 (15) members.

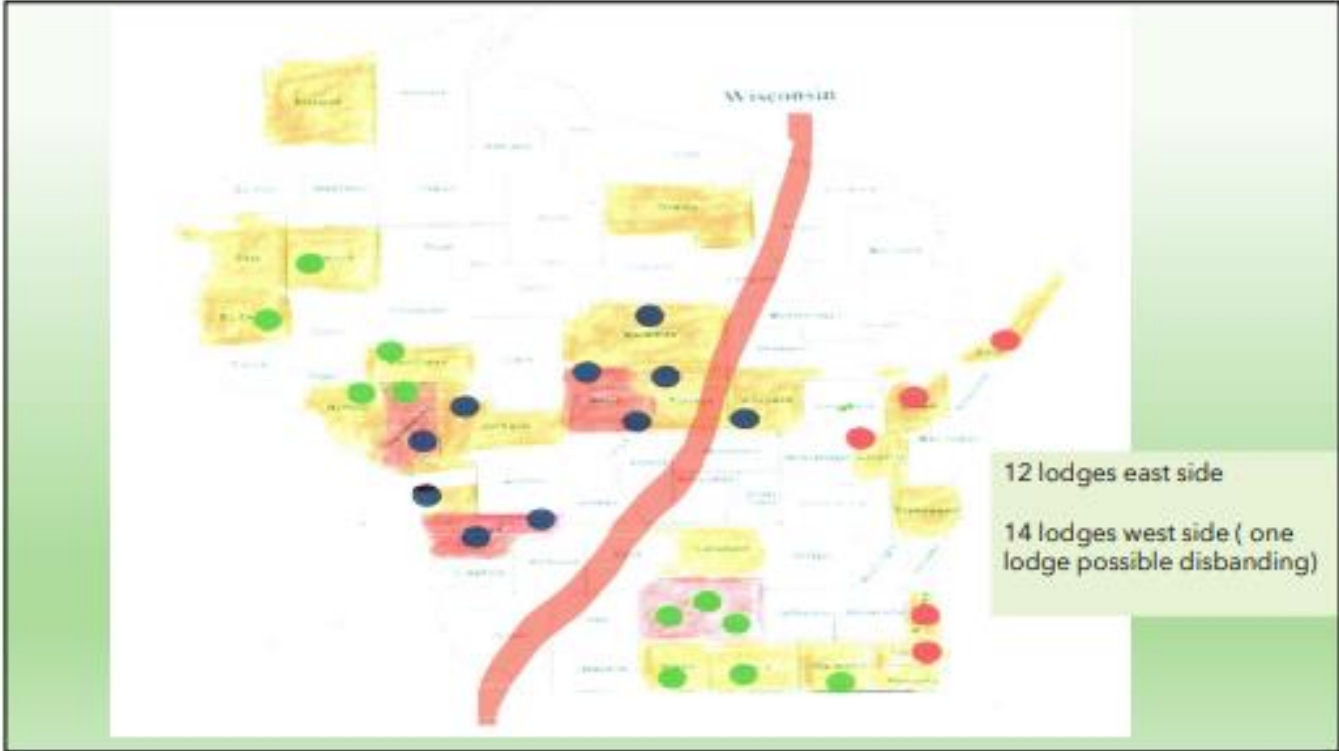
- Six Zones with each having two Zone Directors - 12 members
(Most officers also Zone Director responsibilities)
- Secretary and Treasurer no zone responsibilities - 2 members
- By-law amendment in process of approval to add a Youth Director to the board without zone director duties. - 1 member

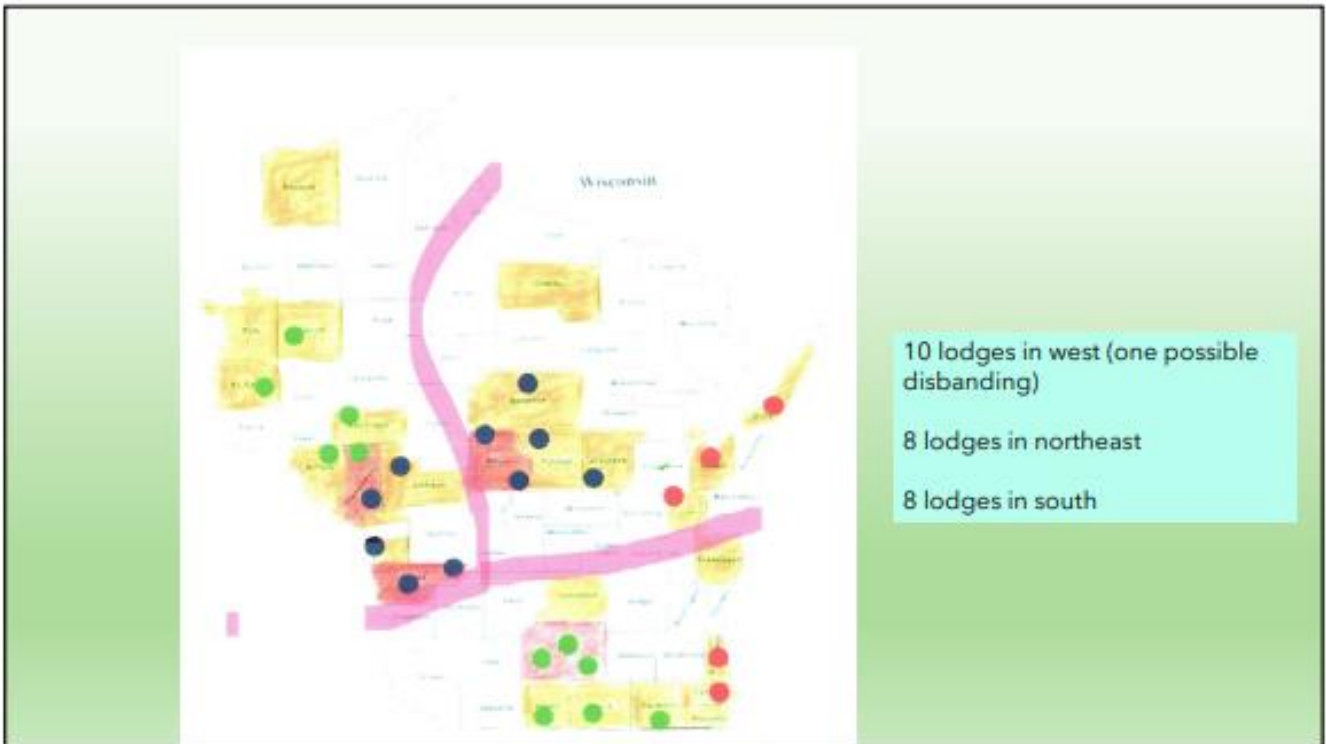
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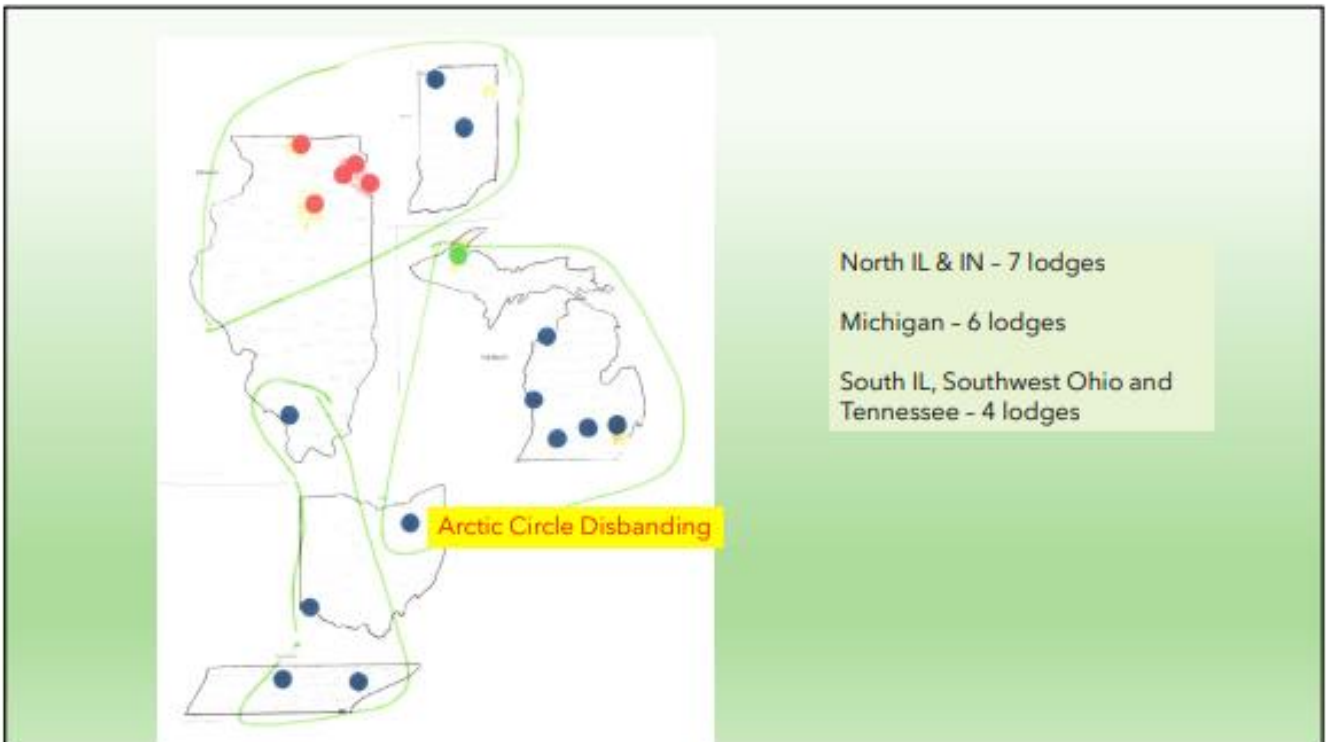


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Board of Directors BOD					
	Number of Zones	Officer with Zone Duties	Officer w/o Zone Duties	Zone Director	Total BOD
Currently*	6	5	3	7	15
Option 1	5	3	5	4	12
* Current assumes bylaw change approved.					

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Deadlines and Dates! Changes in red!

- April 5- Photo submissions for the Viking to LaVonne Wier at 2nor1rus@gmail.com
- April 14-16- Spring District 5 Board Meeting in Anna, Illinois
- April 15- Sarah Paulsen Scholarships due to Scandiana Lodge for Masse Moro
- May 5- Photo submissions for the Viking to LaVonne Wier at 2nor1rus@gmail.com
- May 15-
 - **D18 Lodge Property Association** forms are due to Sons of Norway Headquarters. They can be entered electronically via the lodge treasurer’s profile page. A PDF can be downloaded from sofn.com.
 - **990** The 990 tax forms are due to the IRS by 5/15/2023. Lodges who fail to file a 990 three years in a row will lose their not-for-profit status and cease being a Sons of Norway lodge.
- June 5- Photo submissions for the Viking to LaVonne Wier at 2nor1rus@gmail.com
- July 5- Photo submissions for the Viking to LaVonne Wier at 2nor1rus@gmail.com
- July 16-21- Masse Moro Camp

Who to contact at the home office when you need help

- You can email cbs@sofn.com for any member updates that need to be made.
- For anything fraternal- Connie O’Brien (COBrien@sofn.com) or Amy Tuchenhagen (ATuchenhagen@sofn.com). Sherry Gorse is no longer employed at Sons of Norway.
- For matter like submitting a death, a change to a members address or other info please email cbs@sofn.com
- For issues with passwords or website use ithelp@sofn.com.

- The 800 number to call in for member support is 800-945-8851
- If you need something related to sales, you can use sales@sofn.com

Viking Chest / Immigrant Trunk Schedule

Oct 2022 to Apr 2023:

Chest--zone 1
Trunk--zone 2

Apr 2023 to Oct 2023:

Chest--zone 4
Trunk--zone 3

Oct 2023 to Apr 2024:

Chest--zone 6
Trunk--zone 5

Apr 2024 to Oct 2024

Chest--zone 2
Trunk--zone 1

Oct 2024 to April 2025

Chest--zone 3
Trunk--zone 4

Note:

- Check correspondence from the International and District and the International (www.sofn.com) and District (www.sonsofnorway5.com) websites for any updates and changes.
- Additional deadlines for the District 5 and International Conventions/Lodge Meetings will be added as those dates are established. Watch for future mailings and the District 5 website.

Compiled by Darlene Arneson, SN District 5 Secretary (arnesonfamily5@gmail.com or 608-873-7209)

FFFN Basics

In an attempt to help our lodge leaders become more familiar with resources, changes, deadlines and other information, I will compile a weekly "Friendly Fifth Friday News" email to our leadership. Some of the information you might already have, but hopefully it will be a good reminder for all of us (me included) of all the great resources that Sons of Norway has to offer. **Please feel free to cut and paste any of this information for your lodge's use!**

Send all web posting info and calendar dates/events directly to our webmaster at inputd5@sonsofnorway5.com

With our new arrangement, I actually send the FFFN pdf to our webmaster on Thursday morning before I go to work. So if you have anything you'd like me to consider putting in, please send it by 4 am on Thursday morning. Please do not send pdf's as I have a hard time cutting and pasting them. The Word Document works best for me. Don't forget that lodge events should be submitted to inputd5@sonsofnorway5.com as I have a hard time keeping track of all lodge activities. I'll put some in but that is more the role of the website event calendar.

If you would like to get the MS Word document, just shoot me an email and I'll add you to the list. I send it out right after I send the email to the large group.

Darlene Arneson – arnesonfamily5@gmail.com