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I. INTRODUCTION

Congratulations on being elected financial secretary of your lodge. You hold an extremely important position, contributing greatly to the organizational and fiscal well being of your lodge.

As financial secretary, you have been entrusted with the responsibility of handling membership records and many of the business matters for your lodge. This section of the Guide for Leadership will provide information to help you perform the duties of your position.

II. FINANCIAL RESPONSIBILITIES

A. COLLECTING ALL INCOMING MONEY

As financial secretary, it is your responsibility to receive all incoming money for your lodge. The money you receive comes from two primary sources: Sons of Norway Headquarters and lodge members. The treasurer should accept no receipts except those issued by you.

The procedure to receive money is as follows:

- Issue a receipt if the money you receive is from a member or a source other than from Headquarters.
- Record totals on the appropriate line of the "Financial Secretary's Report to Treasurer" (#6A).
- Turn over the money and the completed white slip from the booklet to the treasurer at the end of the lodge meeting or at the next board meeting. The treasurer should initial the yellow copy of the report slip, which you keep in the booklet for your records.
- Record information about the transaction. You can either use a computer spreadsheet or the Financial Secretary's Cash Book (#90). Each entry in the spreadsheet or cash book should include:
 - The date you received the money
 - From whom you received the money
 - The receipt number
 - The amount received
 - The report number and total amount given to treasurer

As financial secretary, you will receive monthly and semi-annual financial reports from Sons of Norway Headquarters, which may include checks for your lodge.

MONTHLY ACTIVITY REPORT

This report is sent from Headquarters to distribute the local lodge portions of the dues paid by members during the previous month. This report lists the members who renewed, reinstated or opened new memberships. It also lists the local lodge dues portion for each member along with any application fees or other financial adjustments. A check for the total of these payments is usually enclosed with the report. However, if the total is below \$25, the amount is forwarded on to the next monthly report.

SEMI-ANNUAL LODGE OFFSET CHECK

Your lodge gets an offset check from Headquarters twice a year: one at the end of December and the other at the end of June. The amount you receive is computed using percentages based on the insurance policies held and opened by your members during the previous six months. Detailed information is included on the stub of the check and accompanying letter.

From your members, you should collect money for events such as dances, lutefisk dinners, etc. You will also be receiving yearly renewing affiliate dues payments (see 'Affiliate Member' on page 5). Regular members are billed annually for renewal by Sons of Norway Headquarters and send payment directly to Headquarters.

B. HELPING TO PREPARE FINANCIAL REPORTS

Each January, Sons of Norway Headquarters sends a Financial Statement (#17) to the lodge treasurer. You should assist the treasurer in filling out the form and then sign the document along with the president, secretary and treasurer. You should also be present when the auditing committee reviews the report. This form is due to the Accounting department at Headquarters by March 1st.

III. UNDERSTANDING THE BASIC FORMS OF MEMBERSHIP

Because you are the local resource for membership information, it is important to have a clear understanding of the basics. Feel free to contact membership services at Sons of Norway Headquarters with any questions at 1-800-945-8851 ext. 643 or by e-mail: fraternal@sofn.com.

There are several categories of membership in Sons of Norway. The category a member is assigned determines their total dues rate and the membership benefits they receive.

A. BASIC CATEGORIES

PRIMARY

Most members are primary members. A primary member pays the full amounts for international, district and lodge dues and receives their own *Viking* magazine monthly. A primary member can vote, hold office and serve as a delegate for his/her local lodge.

SPOUSE

A spouse member is the wife or husband of a primary member and pays \$5.00 less in international dues, full district dues and the spouse dues for their local lodge. Spouse members don't receive their own copy of the *Viking* magazine. They can vote, hold office and serve as a delegate.

UNGE VENNER

"Young Friends" are age 16–23 years old. If an Unge Venner is the lineal descendent of a current member or resides in the same household as a Sons of Norway member, then they will be exempt from paying dues under the "Family Membership" program. Any other member of Sons of Norway between the ages of 16 and 23 will pay dues at a reduced rate. Dues paying Unge Venner get their own copies of the *Viking*. Dues exempt Unge Venner can receive a subscription to *Viking* magazine for a fee. Both dues exempt and dues paying Unge Venner can vote, hold officer and serve as delegates.

HERITAGE

A heritage member is age 0-15 and must have a family member who is a Sons of Norway member in good standing. Their dues are always free. They receive our *Viking for Kids* magazine four times a year. Heritage members do not vote or hold office, nor are they included in the lodge membership count. Also, years as a heritage member do not count towards golden membership or anniversary awards.

JUVENILE

Juvenile membership is a category for members owning Juvenile insurance policies who are between the ages of 0-21. Juvenile members are often denoted with the letter 'J' on membership listings. They don't pay dues and cannot vote or hold office. Juveniles who are aged 0 – 15 are treated just like heritage members, receiving our *Viking for Kids* magazine four times a year.

B. LONG-TERM MEMBERSHIP AWARD CATEGORIES

GOLDEN MEMBER

Golden membership is awarded to primary and spouse members who have been with Sons of Norway for 30 years and who are age 65 or older. The years of membership do not need to be consecutive. Golden members pay half international and half district dues, plus their local lodge dues.

LIFE MEMBER

Life membership is no longer awarded. This award category was replaced by golden membership in December of 1998. Life membership was awarded to members who had been with Sons of Norway for 30 years and were 65 years or older prior to December, 1998. Life members do not pay dues. They were recognized with a pin and certificate when they qualified for this category.

C. SPECIAL REQUEST CATEGORIES

HONORARY

Honorary membership is bestowed by the international board of directors. The nomination process is as follows:

- o The Honorary Request Form (#D59) needs to be completed and mailed to the district president.
- o If the district president approves the request, they will forward it to the international board of directors who will vote on the application at the next board meeting. There are two board meetings a year: one in the fall and one in the spring.
- o Upon the approval of the international board, have the new honorary member fill out a membership application. Send the application to Sons of Norway Headquarters along with payment (*supplied by the lodge*) for the upcoming year.
- o An honorary certificate and membership pin is mailed to your lodge or to the district for presentation.
- o The yearly dues for the honorary member are renewed each January. The amount is deducted from the total of your January Monthly Activity Report.

AFFILIATE

Affiliate or dual membership allows people to belong to two lodges at the same time. Members who are affiliates of your lodge have all the privileges of regular members, except they cannot vote on delegates or serve as delegates. The application process is as follows:

- As the financial secretary of the affiliate lodge, provide the member with an Application for Affiliate Membership (#AAM3028) to complete. The member fills out the top part of the form and

returns it along with a payment for affiliate dues, which is the local lodge dues amount.

- Fill out the Affiliate Membership Card, which is the bottom half of the form. The card is separated from the top part and given to the member. The top part of the form is kept for lodge records.
- Nothing needs to be sent to Sons of Norway Headquarters. Affiliate membership is managed entirely at the local lodge level.
- Make a note to bill the member annually for affiliate dues on the anniversary of their induction as an affiliate member and add them to your membership records.

IV. UNDERSTANDING THE DUES STRUCTURE

When a new or renewing member pays their membership dues, the amount is divided between three separate entities within Sons of Norway.

INTERNATIONAL

The largest portion of the dues helps pay for the *Viking* magazine, fraternal programs and administration of the organization. The international board of directors sets this rate. Any changes in the international dues rates will be indicated in the board minutes published annually in the *Viking* magazine.

DISTRICT

Each district board sets this amount. Changes will be communicated by the district to the local lodges by mail.

LOCAL LODGE

Each lodge votes on their local lodge dues amounts and lists them in their bylaws. Changes should be communicated to members in writing.

Dues vary greatly from district to district and lodge to lodge. If you have any questions about dues, contact member services at Sons of Norway Headquarters by calling 800-945-8851 or e-mailing fraternal@sofn.com.

Some lodges also charge an application fee to new members as indicated in their local lodge bylaws. If the application fee is sent to Headquarters along with the dues for a new member, it is returned to you along with local lodge portion of the dues and the Monthly Activity Report.

V. MAINTAINING MEMBERSHIP RECORDS

You should keep a record listing all the members of your lodge. This official register of members can consist of a three-ring binder containing Membership Register (*annual*) sheets (#571A) or a computer spreadsheet.

The following reports from Sons of Norway Headquarters will assist in record maintenance.

- Determining which members should be awarded anniversary pins.
- Creating a list of birthdays to help your members celebrate
- Checking to see if Headquarters has received and processed any recent address changes, member transfers etc.

MONTHLY LODGE ACTIVITY REPORT

This report is created by Headquarters the 2nd of each month and is mailed or e-mailed to you and the vice president of your lodge. It lists the membership changes made during the previous month such as:

- Address changes
- Cancellations, suspensions and deaths
- Members transferring in and out of your lodge
- New and reinstated members
- Members whose dues payments are 45 days past due

You can use this report to update your lodge records and help the vice president and membership committee follow up with members who are 45 days past due. If you have any questions about the information on this report, please contact membership services at Headquarters 800-945-8851 or fraternal@sofn.com.

MEMBERSHIP LISTINGS

These lists provide vital information about your members, such as their addresses, phone numbers, e-mail addresses, effective dates, birth dates and dues paid-to dates. These lists are not sent automatically, but can be downloaded at any time from the members area of www.sonsofnorway.com or can be requested from membership services at Headquarters. Membership services can provide the lists either by e-mail or snail mail. These listings are up to date the moment they are downloaded or created. They are very useful for:

VI. NEW MEMBERS, REINSTATEMENTS AND TRANSFERS

As financial secretary, you are a primary contact for people wishing to join your lodge. The money collected with new member applications and reinstatements is treated differently from the other monies you receive. It is typically sent directly to Sons of Norway Headquarters with the members' paperwork. Transferring members do not pay any dues at the time of the transfer.

A. NEW MEMBER APPLICATIONS

When someone new to Sons of Norway wishes to join, the procedure is as follows:

Each new primary, spouse or ungevenner member fills out a Membership Application (#215A). Important required information includes:

- Complete name and address
- Birth date
- Lodge name and number
- Amount of dues paid
(and application fee, if applicable)

If another member has recommended an applicant, the recruiter's name and member number should be listed on the appropriate line.

If your lodge has a membership committee, forward the application on to them for review.

Applications are presented to the lodge at the next meeting.

If your lodge has retained the ritual of voting for new members, the members of your lodge should vote on the application.

If the new member/s has been approved:

- Send the white copy of application/s and dues to Sons of Norway Headquarters. You may either send in a check from the lodge, obtained from the treasurer, to cover dues for all members OR include payments from the individual members (*check or credit card*). Any applications received without payment will be returned to the lodge
- Retain a copy of the application for your records.
- Add the members' information to your official register of members. You can either use the "Membership Register" (#571A), which is kept in a three ring binder, or a computerized spreadsheet.
- Inform your newsletter editor of any new members
- New members are welcomed into your lodge at the next meeting or at a special welcome ceremony.

A Sons of Norway Heritage Membership application/postcard can be used to sign up children, ages up to 15 years, who have a family member who is a current member of Sons of Norway.

Two weeks after their membership has been entered into the system at Headquarters, the new member will receive a membership card and a welcoming letter in the mail. A new member kit will arrive 4-6 weeks after they have been registered.

B. REINSTATING FORMER MEMBERS

If someone who was previously a member would like to re-join, they have two options:

OPTION 1

A reinstating member can pay back dues and retain their original start date. For example, Mary Marple was a member of Sons of Norway from 1981–2004. Mary decides she wants to rejoin in 2006 and keep her original start date so she can be eligible for anniversary pins sooner.

- Mary pays for the years she missed plus the upcoming year. This would be two years of back dues (2004–2005 and 2005–2006) and one year going forward (2006–2007) for a total of three years.
- She includes a note with her payment explaining which years she is paying for.
- She retains her original start date with Sons of Norway.

OPTION 2

A reinstating member can also chose to pay going forward. For example, Katje Johnson was a member from 1998-2001. In September of 2006, she decides to rejoin Sons of Norway. She isn't concerned about her start date so she does the following:

- Fills out a new membership form
- Pays for the upcoming year. (09/2006–09/2007)
- A new "start date" is assigned which will reflect the lapse in her membership while still giving her credit for her first term of membership.

In either case, you would add the reinstated member to your official register of members, which can consist of either three ring binder of "Membership Register" (#571A), or a computerized spreadsheet.

If a member has been cancelled or suspended within the last 12 months, their payment will be automatically applied toward the current year. For example, if Ole's membership was paid through 04/01/07, but he didn't pay his dues until 10/01/07, the payment will be automatically applied to the current year. His dues will be paid from 04/01/07 to 04/01/08. Any issues of the *Viking* that Ole may have missed can be requested from membership services at the time of his reinstatement.

Note: Current members who are simply renewing their current memberships send their payments directly in to Sons of Norway Headquarters. If you receive dues for a renewing member, please forward the payment on to the Sons of Norway's Accounting department.

C. MEMBERSHIP TRANSFERS

If a member of another lodge would like to transfer into your lodge, please notify Sons of Norway Headquarters and the former lodge using the yellow Transfer Form (#3). The procedure for transferring a member is as follows:

- The person wishing to transfer fills out Part A and gives the whole form to you. A transferring member does not pay any dues to their new lodge at the time of the transfer.
- If necessary, the lodge members vote on approval of the transfer.
- If the member is approved, you send Part A to membership services at Sons of Norway Headquarters.
- Part B, the lower half of the 2nd page, is retained for lodge records. The transferred member is added to your official register of members.
- Complete the transfer by filling out Part C, the top half of the 2nd page, which features the option to request a pro rated portion of the member's local lodge dues for the current year. Part C is then mailed to the financial or membership secretary of the former lodge. Contact information

for financial and membership secretaries can be found on www.sonsofnorway.com under 'senior officers' on the online lodge directory, in your district directory or by e-mailing/phoning membership services at Headquarters. If the member is transferring from a general category, such as 000 or 999, section C should be mailed to Headquarters.

- If pro-rated dues have been requested, the financial secretary of the former lodge determines the correct amount and sends a payment back to the new lodge. The following explains how to determine the amount owed to the new lodge if this request has been made:
 - Start with the local lodge portion of the member's annual dues. For example, if your members pay a total of \$35 and \$6 goes to you local lodge, then the amount you use is \$6.
 - Divide this number by 12. The result is a month's worth of local lodge dues. For example, \$6 divided by 12 = 50 cents a month.
 - Determine how many months remain until the member's next due date. For example, if it is May and they are paid through the end of October, this would be 5 months.
 - Multiply the number of months until their next due date by the monthly amount of local lodge dues. In our example, it would be 5 x .50 for a total of \$2.50.
 - Have the treasurer make up a check for this amount and mail it to the financial or membership secretary of the member's new lodge.

VII. CHANGES IN CONTACT INFO. OR MEMBERSHIP STATUS

As financial secretary, you are the primary link between your lodge and Sons of Norway Headquarters. Changes in the contact information and status of your members can be communicated to membership services by e-mail, mail, fax or phone. This helps to ensure that the data Sons of Norway has is accurate and up to date which is to everyone's benefit.

A. ADDRESS AND NAME CHANGES

As financial secretary, you can report changes in addresses, phone numbers, e-mails or names in any of the following ways:

- Filling out an official "Change of Name (#19A)" or "Change of Address (#20)" card and mailing or faxing it to Headquarters.
- Penciling in your changes on an existing Lodge Membership List and mailing it to Headquarters.
- Including the information in an e-mail to fraternal@sofn.com.
- Encouraging individual members to make their own changes in the members section of our website: www.sonsofnorway.com.

If a member has a seasonal address, Sons of Norway Headquarters should be advised each fall when the member makes their yearly move.

B. CANCELLATIONS AND SUSPENSIONS

If a member notifies you that they would like to cancel their membership, please submit this information to Sons of Norway Headquarters by e-mail to fraternal@sofn.com, through the mail or over the phone. Members can also cancel their memberships by writing "please cancel" on their dues notice and mailing it back to Headquarters.

A membership is suspended when the dues are 120 days overdue. You do not need to contact Headquarters when you know that a suspension is imminent. It will happen automatically.

C. DEATH NOTICES

When a member passes away, a Notice of Death Card (#10-A) needs to be completed and mailed to Sons of Norway Headquarters. If possible, include an obituary with the form. It is very important that your source for this information is reliable. The deceased member's name will appear in *Viking* magazine's "In Loving Memory" section three months after their death has been reported.

VIII. ORDERING PINS AND CERTIFICATES

Sons of Norway members really enjoy receiving recognition for their years of membership or a job well done. One of your duties is to order awards for members from Sons of Norway Headquarters.

A. ANNIVERSARY PINS AND CERTIFICATES

Headquarters has anniversary pins available for every five years of membership: 5, 10, 15, 20, 25, 30, 35, 40, 45, 50, 55, 60, 65, 70, and 75. Each lodge decides which denominations of pins they will award on a regular basis, and when and how the pins are to be presented. They can be ordered using the Request for Membership Pins and Medals form (#3835) or by sending an e-mail to fraternal@sofn.com. There is a charge for each pin. A bill will be sent to you along with your order. You can either pay this bill and be reimbursed by your lodge or forward the bill to your treasurer.

Anniversary certificates are available from Headquarters for members achieving a 25, 30, 40, 50, 60 or 75 year anniversary. Other denominations can be provided if requested. You can order anniversary certificates using the Request for Membership Certificates form (#D57) or by e-mailing or phoning membership services at Headquarters. You need to provide the name of each member receiving a certificate. These certificates are provided free of charge.

A simple way to determine which members eligible for anniversary awards is to use a Sons of Norway Membership Listing (#MEM510). You can either download the list from www.sonsofnorway.com in an Excel format and sort it by effective date (*the official term for 'start date'*) or you can request a paper or e-mailed list from membership services which is already sorted by effective date.

B. HERITAGE ANNIVERSARY CERTIFICATES

Heritage members (ages 0–15) are not eligible for regular anniversary pins and certificates. Instead, special 5, 10 and 15 year certificates

for your long term Heritage members have been created. They can be ordered by e-mail (fraternal@sofn.com) or by phone (800-945-8851). There is no charge for these certificates.

C. GOLDEN PINS AND CERTIFICATES

Golden membership pins and certificates do not need to be ordered. They are sent automatically each month to the lodge president. You can order replacements for lost or damaged pins from membership services.

D. VELKOMMEN TIL OSS

Welcome certificates can be ordered for new members joining your lodge which can be presented at their welcome ceremony. These certificates say 'Velkommen til oss' and the name and number of your lodge. They can be ordered at no charge from membership services at Headquarters.

E. OTHER AWARDS

Several other pins and certificates can be found in the Sons of Norway Lodge Supply Catalog (#321) along with price and shipping information. They can be ordered using the Lodge Supply Requisition form (#LSR318) or by e-mail at supply@sofn.com.

IX. FINANCIAL SECRETARY'S FORMS

Application for Affiliate Membership (#AAM3028).

Change of Address (#20)

Change of Name (#19A)

Financial Secretary's Cash Book (#90)

Financial Secretary's Report to Treasurer (#6A)

Financial Statement (#D17)

Honorary Request Form (#D59)

Lodge Supply Requisition Form (#LSR318)

Membership Application (#215A)

Membership Register (*annual*) sheets (#571A)

Notice of Death Card (#10-A)

Request for Membership Certificates form (#D57)

Request for Membership Pins and Medals form (#3835)

Sons of Norway Lodge Supply Catalog (#321)

Transfer Form (#3)

NOTES

X. CONCLUSION

As financial secretary, you are the vital link between your lodge and Sons of Norway Headquarters. Through your diligence and hard work, the introduction of new and transferring members will run smoothly, long term members will enjoy celebrating their anniversaries with your lodge and your membership records will prove dependable and accurate. Thank you for all the work you do for Sons of Norway.