

# FRATERNAL LEADER HANDBOOK

*For chapter activities coordinators and youth service club leaders*

2025





# TABLE OF CONTENTS

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3	Welcome and introduction
4	Chapters and Summit chapters
5	<i>Overview / Building a chapter board</i>
6	<i>Managing chapter finances</i>
8	Youth service clubs
9	<i>Overview</i>
10	<i>Managing youth club finances</i>
11	How to plan, request and report activities
14	Premier status – what it is and how to earn it
16	Technology resources for leaders
17	<i>Make an Impact website (<a href="http://imakeanimpact.org">imakeanimpact.org</a>)</i>
17	<i>Make an Impact reports</i>
18	<i>Tracking attendance and Fraternal Connect</i>
19	<i>Training &amp; Resources website</i>
20	Activity types
21	<i>Educational events</i>
22	<i>Hometown Hero events</i>
23	<i>Matching Fund projects</i>
24	<i>Service projects</i>
25	<i>Social activities (chapters only)</i>
26	<i>Community days (Summit chapters only)</i>
27	Fraternal policies
30	How to stay connected with the Fraternal Department

# WELCOME!

*Thank you for stepping up as a Modern Woodmen fraternal leader. This role gives you a chance not only to enhance lives, but also to create a ripple of positive change in your local community.*



## ? WHAT IS MODERN WOODMEN OF AMERICA?

Modern Woodmen was founded in 1883 to clear financial burdens – not trees. As a fraternal financial services organization, our products and programs support **financial security, quality family life** and **community impact** – the common bonds that unite our members nationwide.

Since its founding, Modern Woodmen has brought people together, supported families, and strengthened communities nationwide through fraternalism. In 2023 alone, we contributed \$18.2 million and 250,449 hours of volunteer service through fraternal activities and programs.

Local chapters and youth service clubs offer members opportunities to dive into meaningful events that make a real difference. As a leader, you help us build a culture that celebrates caring, fosters fun, and creates a family atmosphere that enriches lives.

## ?! WHAT IS A FRATERNAL BENEFIT SOCIETY?

Modern Woodmen was founded as a fraternal benefit society, a 501(c)(8) tax-exempt organization. Our tax exemptions granted by the U.S. Congress and state legislators allow us to host social and educational activities and support local causes through fundraisers and volunteer projects. Member involvement in these activities is crucial for maintaining our tax-exempt status. For more information, review the [Member Involvement](#) policy.

## TYPES OF MEMBER GROUPS



### CHAPTERS

Provide opportunities for members of all ages to volunteer, socialize and learn.



### SUMMIT CHAPTERS

Offer fun and fulfilling local events for members ages 55 plus.



### YOUTH SERVICE CLUBS

Emphasize volunteerism, patriotism, education and fun for members up to age 16. (Guided by adult member leaders.)

## 2025 REMINDER

*Active Summit chapters and youth service clubs can continue their activities, but no new groups can be chartered at this time.*

## WHAT DOES 'MAKE AN IMPACT' MEAN?

"Make an Impact" is more than just a slogan; it's a call to action. It's also the name of the [website](#) you'll use for most of your communication with the Fraternal Department team at Modern Woodmen's home office. As a fraternal leader, you have a unique opportunity to make an impact by providing the resources – people and dollars – that your community needs most!

## WHAT'S AVAILABLE IN THIS HANDBOOK?

This handbook is your go-to guide, packed with chapter, Summit chapter and youth service club program guidelines, along with activity and project ideas to set you up for success. With this handbook and our online training modules for [chapters](#), [Summit chapters](#) and [youth clubs](#), you'll discover exciting ways to engage your members and serve your community in a meaningful way.



# CHAPTERS AND SUMMIT CHAPTERS





## WHAT IS A CHAPTER?

Modern Woodmen operates a nationwide lodge system of local chapters. Each chapter is registered with the Internal Revenue Service with its own tax ID number as part of our group exemption. Chapters organize fraternal activities that bring members of all ages together for social events, educational programs and impactful volunteer opportunities.

## WHAT IS A SUMMIT CHAPTER?

Summit chapters are for members ages 55 and older. They're registered with the Internal Revenue Service in the same way as other chapters and offer fun and fulfilling experiences to fit the busy lifestyles of members in this age group. *Note: As of Jan. 1, 2025, no new Summit chapters will be chartered. Existing groups can continue to operate as usual.*

## WHO BELONGS TO A CHAPTER?

All Modern Woodmen members are assigned to a chapter when they join. Beneficial members hold Modern Woodmen life insurance and/or annuity certificates, while social members do not.

Members are encouraged to invite guests to fraternal events. After attending two or three events, however, guests should be encouraged to become members to continue participating in chapter activities. You'll find more information in the [Member Involvement](#) policy.

## BUILDING A CHAPTER BOARD

A well-run chapter starts with an active board of members who work together to create meaningful experiences for chapter members and their communities. The board should include four officers and three at-large trustees, elected in December and appointed in January.

### • **ACTIVITIES COORDINATOR:**

Leads the chapter alongside the board. (See main responsibilities detailed on [Page 6](#).) No term limit, minimum age 18.

### • **MEMBERSHIP COORDINATOR:**

Welcomes and engages members at events, encouraging participation. One-year term, minimum age 16.

### • **PRESIDENT:** Leads meetings, appoints committees, communicates passwords, oversees chapter elections, and follows Modern Woodmen's bylaws. One-year term, minimum age 16.

### • **VICE PRESIDENT:** Fills in for the president when needed. One-year term, minimum age 16.

### • **AT-LARGE TRUSTEES (3):** Provide guidance and feedback to chapter officers. Three-year term, minimum age 16.

Board members must be beneficial Modern Woodmen members and members of the corresponding chapter's roster. Exception: Membership coordinators who are financial representatives are not required to be on the chapter's roster.



## KEY TIMES

### TO INVOLVE THE BOARD

- **Activity planning:** Brainstorm ideas, connect with local organizations, and host events.
- **Premier planning:** Work on an action plan to achieve premier status and allocate premier funds.
- **Engaging members:** Interact with attendees at events and encourage their future participation.
- **Finances:** Review chapter finances and approve special purchases, including equipment.

### BUILDING A CHAPTER BOARD *continued*

You're required to **hold at least one board meeting\* per calendar year** to earn or maintain premier status. The board must include at least three elected officers whose names are submitted in an online board report on [imakeanimpact.org](https://imakeanimpact.org) following a meeting.

Ideally, **activities coordinators should be assigned to only one chapter** (or as few as possible), so they can focus on engaging a specific group of members in the local community. Guidelines allow activities coordinators to lead up to three chapters. Exceptions may be granted under special circumstances.

The board should be involved in decisions about chapter leadership, events and finances. Use this fillable [chapter board meeting agenda](#) to guide discussions.

\*The Fraternal Department will reimburse \$7 per attendee (for up to seven attendees), up to twice a year, up to the total cost of the meeting.



### WHAT DO ACTIVITIES COORDINATORS DO?

- Plan, promote and lead monthly activities and volunteer service projects.
- Hold varied events to engage members throughout the year.
- Work with the chapter board to achieve premier status.
- Request preapproval and report activities through Modern Woodmen's Fraternal Department via [imakeanimpact.org](https://imakeanimpact.org).
- Manage chapter finances and records responsibly.
- Uphold Modern Woodmen's [Code of Conduct](#).
- Act as an ambassador for Modern Woodmen in your community.

Find info about activities coordinator compensation on the next page!

# MANAGING CHAPTER FINANCES



### CHAPTER LEADERS' FIDUCIARY RESPONSIBILITIES

As the chapter's activities coordinator, you're in charge of managing and documenting all financial transactions in a clear and timely manner.

*Be sure to:*

- **Keep receipts** for purchases related to chapter activities until the activity report is approved on [imakeanimpact.org](https://imakeanimpact.org). (Note: You'll upload them when you submit the corresponding event's report online.)
- **Share financial details** with your chapter board during board meetings.

- **Obtain chapter board approval** for any expenses that can't be reimbursed, like equipment or donations to charities. If the purchase exceeds \$500, prior approval from the Fraternal Department is required.

Report any equipment bought with chapter funds annually using the Chapter Equipment and Asset Report. For further details, refer to the [Equipment and Asset](#) policy.

The Fraternal Department periodically reviews chapter bank accounts. It's essential to maintain accurate and transparent records.



## CHAPTER BANK ACCOUNTS

Your chapter's bank account is held at Vibrant Credit Union. New activities coordinators will receive a welcome email from Vibrant Credit Union, followed by a second email containing DocuSign documents to be completed electronically.

The coordinator won't be listed as a signer on the bank account or have access to the funds until these documents are completed. You'll receive a confirmation email from Vibrant Credit Union when your access has been established. **Watch for emails** from [MWACHapters@vibrantcu.org](mailto:MWACHapters@vibrantcu.org) and [dse@docusign.net](mailto:dse@docusign.net).

Always **use the chapter debit card or checks for purchases** to maintain an accurate electronic record of transactions. Don't link the chapter bank account or debit card to any electronic payment platform like Venmo, CashApp, PayPal, etc. Refer to the [Use of Electronic Money Management Tools](#) policy for more information.

If needed, you can use personal funds and **reimburse yourself** once chapter funds are available. This might be necessary while waiting for access to the bank account when you first begin your role.

To manage your chapter's account:

- Check the account balance on the chapter dashboard at [imakeanimpact.org](http://imakeanimpact.org) or directly through Vibrant Credit Union's online banking system or mobile app.
- Contact Vibrant Credit Union if you notice any issues or suspect fraud. Email [MWACHapters@vibrantcu.org](mailto:MWACHapters@vibrantcu.org) (recommended). Or call 888-452-2443.

## PROPER USE OF FUNDS

Only use chapter funds for expenses necessary to host activities. The Fraternal Department reserves the right to deny funding for activities that violate guidelines for proper use of funds or could jeopardize Modern Woodmen's tax-exempt status.

Leaders must also adhere to the [Fraternal Recipient Eligibility](#) policy when planning Matching Fund events and service projects.

## ACTIVITY REIMBURSEMENTS AND LEADER COMPENSATION

As the activities coordinator, you'll use the chapter's bank account to make purchases for events. After your activity report is approved on [imakeanimpact.org](http://imakeanimpact.org), the Fraternal Department will deposit the reimbursement directly into the chapter's bank account.

A chapter may ask for an advance when submitting a request for an educational event, service project, Hometown Hero event or social activity. Advances are only paid if the cost to cover the event exceeds the amount of funds available in the chapter's bank account.

Find a breakdown of the annual reimbursement amounts for various chapter activities on [Pages 20-26](#) of this handbook.

## ACTIVITIES COORDINATOR COMPENSATION

As an activities coordinator, you'll earn \$75 per activity, for up to 12 activities per year. The Fraternal Department will electronically deposit these payments into your chapter bank account.

- You can view or change your payment timing/frequency by logging in to [imakeanimpact.org](http://imakeanimpact.org) and updating your settings under Account > Payment Interval.
- You can write a check from your chapter bank account to pay yourself after funds are deposited into the account.
- Leader compensation over \$600 in a year is taxable.



### CHAPTER FUNDS CAN'T BE USED FOR

- Business marketing purposes.
- Gifts for individual members.
- Alcohol.
- Firearms.



# YOUTH SERVICE CLUBS



## WHAT IS A YOUTH SERVICE CLUB?

Youth service clubs are designed to engage Modern Woodmen members under age 16 in meaningful, hands-on activities. Through these adult-led clubs, young volunteers mobilize, develop new skills, make friends and have fun, all while building strong character and making a positive impact in their communities.

While youth service clubs are sometimes school-affiliated, that's not required. The aim is to include Modern Woodmen members under age 16 from across the local area.

## WHO CAN ATTEND YOUTH CLUB EVENTS?

Membership in a youth service club is open to Modern Woodmen members under age 16. Members can invite guests. However, if guests plan to participate regularly, they're encouraged to become members after attending a few events. For more details, refer to the [Member Involvement](#) policy.

## WHO LEADS YOUTH CLUBS?

Any adult over age 18 who is a beneficial Modern Woodmen member can lead a youth service club. The club leader is the group's primary organizer. Clubs with an average attendance of 10 members at events for six consecutive months may also appoint an assistant leader to support the club leader.

## WHAT DO YOUTH SERVICE CLUB LEADERS DO?

- Plan, promote and lead monthly activities and community service projects for young members.
- Collaborate with the club's sponsoring agent to encourage guests to become members.
- Manage and track club funds responsibly, ensuring they're used in the best interest of the members.
- Submit activity requests and reports.
- Strive for the club to achieve premier status.
- Adhere to Modern Woodmen's [Code of Conduct](#).



## NOTE

As of Jan. 1, 2025, no new youth service clubs will be chartered. Existing groups can continue to operate as usual.

# MANAGING YOUTH CLUB FINANCES



Youth service clubs don't have a tax ID number, so you won't have a club bank account issued by Modern Woodmen. You'll want to **open a personal checking account dedicated** to managing youth service club funds. This helps keep your personal and club funds separate.

Open the account:

- In your name, using your Social Security number.
- As a personal account, not a business account.

As the club leader, you'll manage the club finances and document any financial transactions. **Keep receipts** for purchases related to club activities until the activity report is approved on [imakeanimpact.org](https://imakeanimpact.org). (Note: You'll upload them when you submit the corresponding event's report online.)

## PROPER USE OF FUNDS

Only use club funds for expenses necessary to host activities. The Fraternal Department reserves the right to deny funding for activities that violate guidelines for proper use of funds or could jeopardize Modern Woodmen's tax-exempt status.

Leaders must also adhere to the [Fraternal Recipient Eligibility](#) policy when planning Matching Fund events and service projects.

## ACTIVITY REIMBURSEMENTS AND LEADER COMPENSATION

As the youth club leader, you'll make purchases for events from a personal account. The Fraternal Department will

reimburse you by check after each activity report is received and approved on [imakeanimpact.org](https://imakeanimpact.org).

Find a breakdown of the annual reimbursement amounts for various club activities on [Pages 20-26](#) of this handbook.

## ADDITIONAL REIMBURSEMENTS

- **Hall rental** (up to \$25): Paid per activity when the event takes place in a public space that charges rent. A receipt is required.
- **Postage** (up to \$20): Paid per activity for mailing invitations or greeting cards as part of a service project. A receipt is required.

## CLUB LEADER AND ASSISTANT LEADER COMPENSATION

Youth club leaders receive \$35 per activity, for up to 12 activities per calendar year. Leaders can choose to receive payments on a monthly, quarterly, semiannual or annual basis.

- Payments are processed on the first of the month, and checks will be mailed to the club leader.
- To view or change your payment frequency, log in to [imakeanimpact.org](https://imakeanimpact.org) and update your settings under Account > Payment Interval.

If the club's average attendance reaches 10 members for six consecutive months, you can add an assistant leader. Assistant leaders receive \$20 per activity for up to 12 activities per year. They'll receive payments based on the pay frequency chosen by the club leader.



## CLUB FUNDS CAN'T BE USED FOR

- Business marketing purposes.
- Gifts for individual members.
- Alcohol.
- Firearms.



A woman with dark hair tied back is writing on a whiteboard with a marker. She is looking up at the board. In the background, a man is partially visible, also looking towards the whiteboard. The whiteboard has several papers pinned to it. The entire image has a blue overlay.

# HOW TO PLAN, REQUEST AND REPORT ACTIVITIES

### PLANNING ACTIVITIES

Planning activities that appeal to your members and promote positive community relationships is the heart of your role as a leader.

Your chapter or club can **hold up to three activities per month**. Chapters are limited to two social activities in a month, and a Matching Fund event counts as an activity. Learn more about activity types starting on [Page 20](#) of this handbook.

Request and report all activities through [imakeanimpact.org](https://imakeanimpact.org). You can learn more about how to access and navigate the website on [Page 17](#) of this handbook.

### REQUESTING ACTIVITIES

Once you have your activity planned (date, time, location, etc., are set), you're ready to submit an activity request. Fraternal Department staff review all submitted activity requests to ensure compliance with Modern Woodmen's [fraternal policies](#). If you're unsure whether your event meets the requirements, reach out to the Fraternal Department for guidance before submitting a request.

To request an activity:

1. **Log in** to [imakeanimpact.org](https://imakeanimpact.org).
2. **Complete the activity request** form with all required details.
3. **Carefully review for accuracy** before submitting. Note that the text you enter, including punctuation and capitalization, is used directly in invitations.
4. **Repeat these steps** for each activity your chapter or club plans.

Activity requests must be submitted at least seven days before the event date.

### SENDING INVITATIONS

As a best practice, **use all available invitations and reminders** to maximize attendance. You can also choose to work with someone in your chapter or club to make personal invitations to members

beyond the automated Fraternal Department messages.

#### E-invitations (emails and texts):

- Required for all chapter activities, but optional for youth clubs.
- When submitting your request, select the timing for your e-invitations.
- Once the activity request is approved, e-invitations are automatically sent out via One Call Now to:
  - Emails associated with online member accounts (those registered on [member.modernwoodmen.org](https://member.modernwoodmen.org)).
  - Phone numbers associated with the members' certificates.

#### PRO TIP!

Your members will only receive email invitations if they have an online member account. Many haven't registered for an account yet. To maximize the reach of your electronic invitations, encourage your members to register at [member.modernwoodmen.org](https://member.modernwoodmen.org). It's free and secure! [Learn more](#) about online member accounts (also known as the member website).

#### Postcards:

- **Chapters** – You have the option to mail postcard invitations to members within a selected mile radius (not available for service projects). You can choose to include a field representative's name to request RSVPs via phone or email.
- **Youth service clubs** – Postcard invitations are only available for Matching Fund projects.
- **IMPORTANT** – If you choose to select postcards, you must submit your activity request **at least 28 days in advance** to allow adequate time for printing and mailing.



### ORDERING SUPPLIES

A variety of supplies (signs, name tags, stickers, giveaways, etc.) are available to help your activities run smoothly and incorporate Modern Woodmen branding into your events. You can order supplies on an activity request form or via the **Order Supplies** link on the chapter dashboard at [imakeanimpact.org](https://imakeanimpact.org).

- **Chapters** – Any balances for supplies will be deducted from the chapter bank account. Keep in mind, most supplies should not be listed as expenses in the activity report.
- **Youth service clubs** – The cost of supplies will be considered an advance and deducted from your reimbursement when the activity report is approved.

### SUBMITTING AN ACTIVITY REPORT

After each activity, you'll submit a report that records attendance, cost and a summary of the event. The Fraternal Department must review and approve the report before reimbursements or Matching Fund checks are processed.

To submit an activity report:

- **Log in** to [imakeanimpact.org](https://imakeanimpact.org).
  - Click on **New Report** in the left navigation bar and select the activity.
  - Or from the dashboard, click on the three squares next to the activity and select **Report Activity**.
- **Complete** the report.
  - Fill out all necessary details and attach receipts. Handwritten receipts aren't accepted. If you lose a receipt, use a [manager acknowledgment form](#). You can also use this form when you make a payment directly to the location or give cash to attendees to offset the cost of their meal, admission, etc. (Acknowledgment forms are not accepted for service projects.)
  - Note that attendance recorded in [Fraternal Connect](#) will automatically appear in your report.
  - Include the cost of fee-based supply items (if ordered for the activity) in the total event expenses, and attach a screenshot of the supply order.
  - Split the event costs and attendance between both groups when submitting reports for joint activities with another chapter or club. Ensure reported totals match the full attendance and expenses.
  - Use the "Notes for Fraternal" section to share additional details related to your event that may not be fully captured in the report form.
- **Submit** the report as soon as possible and **no later than 30 days** after the event. More than two late reports could prevent the chapter or club from earning [premier status](#).





# **PREMIER STATUS:** WHAT IT IS AND HOW TO EARN IT



# PREMIER STATUS – WHAT IT IS AND HOW TO EARN IT

Modern Woodmen encourages chapters and youth service clubs to strive for premier status each year. It's a great goal to have as a leader.

Premier status:

- Keeps your members engaged.
- Benefits your local area.
- Ensures we meet IRS requirements for tax-exempt status by investing in the communities where our members live.
- Gives your group access to additional funding to make an even bigger impact!

## HOW CHAPTERS EARN PREMIER STATUS

Hold **at least nine events** during a calendar year (Jan. 1 through Dec. 31) that meet the criteria below. Chapters can hold more than nine events in a year, but the number of events listed in each category is required to earn premier.

Event type	Chapters	Summit chapters
Educational event	1	1
Hometown Hero event	1	1
Matching Fund project	1	1
Service projects	3	1
Social activities/ community days	3	5
<b>Total events</b>	<b>9</b>	<b>9</b>

**Additional requirement:** Your chapter must also **have a board** with at least three officers and **hold a meeting** during the calendar year. Use the online board report on [imakeanimpact.org](https://www.mwdu.org/imakeanimpact.org) to submit board member names and your meeting date.

## HOW YOUTH SERVICE CLUBS EARN PREMIER STATUS

Hold **at least nine events** during a calendar year (Jan. 1 through Dec. 31) that meet the criteria below. Clubs can hold more than nine events in a year, but the number of events listed in each category is required to earn premier.

- 1 Matching Fund project.
- 1 Hometown Hero event.
- 1 educational event.
- 6 service projects.

## TIMELINESS IS IMPORTANT!



All activity reports must be submitted within 30 days of the event date, and no later than Feb. 1 of the following calendar year. Submitting more than two late reports could prevent your chapter or club from achieving premier status.

## EXTRA FUNDS

**Chapters:** When a chapter earns premier status, they're awarded premier funds based on chapter size. Fraternal Department staff members deposit funds into the bank accounts of qualifying chapters beginning in mid-December through mid-February, based on when all qualifying activities for the year are reported and approved.

Chapter membership	Premier award
1-100 members	\$500
101-400 members	\$1,250
401+ members	\$1,500

**Youth service clubs:** Clubs that achieve premier status will receive a \$100 award, to be used at the discretion of the club leader and members. Premier funds are paid directly to the club leader by check.

## WAYS TO USE PREMIER FUNDS

You can use the additional funding your chapter or club receives in a variety of ways.

- **HOST A CELEBRATION.** Take your members to a ballgame or amusement park. Or organize a special meal to thank them for their involvement. You may even inspire more people to get involved in future events!
- **ENHANCE FUTURE ACTIVITIES.** Premier dollars can be used to purchase refreshments, rent a venue, cover admission or ticket costs, pay for a guest speaker, buy supplies for a service project, and more! Having a little extra money that's above and beyond what's available for reimbursement by the Fraternal Department is a nice way to make an event or two extra special for your members.





# TECHNOLOGY RESOURCES FOR LEADERS



### MAKE AN IMPACT WEBSITE ([WWW.IMAKEANIMPACT.ORG](http://WWW.IMAKEANIMPACT.ORG))

The **Make an Impact** website is your go-to resource for managing a chapter or youth service club. Whether you're planning activities, submitting reports or tracking attendance, this website gives you the tools and information you need, all in one place.

Accessible at [imakeanimpact.org](http://imakeanimpact.org), the site is designed to help you:

- Draft, edit and submit activity requests and reports.
- Manage documents, like receipts and photos.

- Easily switch between different clubs or chapters you lead.
- Access Fraternal Connect for tracking attendance at activities.
- View your chapter's member roster, average attendance and progress toward premier status.
- Order supplies and view reports related to your activities, reimbursements and attendance.

Whether you're managing one chapter/club or several, the **Make an Impact** website is intuitive and easy to navigate, with reminders and pop-ups to keep you on track.

### MAKE AN IMPACT REPORTS

You can take advantage of a variety of reports to help you stay organized and in the know. To access:

1. **Log in** to [imakeanimpact.org](http://imakeanimpact.org).
2. **Select** "Reporting" from the drop-down menu.
3. **Choose** a report from the list (a summary of available reports is listed below).
4. **Use** the filters to customize your report. By default, all chapters, Summit chapters and youth service clubs in your region are included. Adjust filters by date, district or other criteria as needed.
5. **Click** "Run Report."
6. **View** the report in your browser or export it in Excel, Word, PDF or other formats.

#### Summary of available reports

Report name	Description	Accessible by
Event Count	Displays the number of pending and completed activities by category and club/chapter number within a specified date range.	<i>RDs, AAs and MPs</i>
Event Attendance Report (by chapter/club)	Shows attendance details (members, guests and averages) by activity category and chapter/club number, based on activities that have been reported.	<i>RDs, AAs, MPs, fraternal leaders and sponsoring agents</i>
Fraternal Reimbursement	Displays reimbursements provided to clubs/chapters by activity category during a specific timeframe. Also includes a separate chart of leader compensation paid during that time.	<i>RDs, AAs, MPs, fraternal leaders and sponsoring agents</i>
Service Hours	Shows reported service hours by chapter/club and activity category.	<i>RDs, AAs, MPs, fraternal leaders and sponsoring agents</i>
Fraternal Impact Report	Displays reimbursements for each region's chapters, Summit chapters and youth service clubs.	<i>RDs, AAs, MPs and fraternal leaders</i>

Continues on Page 18

### Summary of available reports (continued)

Report name	Description	Accessible by
Activities	Shows approved past and future activities, including titles, dates and locations.	<i>RDs, AAs, MPs, fraternal leaders and sponsoring agents</i>
Premier Status Reporting	Tracks the progress of clubs/chapters toward premier status by counting completed and pending activities and any late reports.	<i>RDs, AAs and MPs</i>
Chapter/Club Location	Provides location details and membership counts (both adult and youth) for clubs/chapters in a region.	<i>RDs, AAs and MPs</i>
Chapter/Club Leadership	Lists contact details for fraternal leaders and chapter board members.	<i>RDs, AAs and MPs</i>
Chapter/Club Management	Lists requests approved for new chapters, leadership changes, consolidations or location changes.	<i>RDs and AAs</i>
Fraternal Activity Recipients	Shows Matching Fund, service project and Hometown Hero recipients.	<i>RDs, AAs and MPs</i>
Youth Service Club Rosters	Provides a list of junior members in your area for activity invitations. Search by a particular chapter or ZIP code.	<i>RDs, AAs, MP and fraternal leaders</i>
Fraternal Aid Provided Report	Shows fraternal aid recipients, including premium amounts, mode, approval dates and reasons for aid.	<i>RDs, AAs and MPs</i>
Attendance App Report	Displays attendees captured through Fraternal Connect, including guests and members.	<i>RDs, AAs, MPs, fraternal leaders and sponsoring agents</i>

### TRACKING ATTENDANCE AND FRATERNAL CONNECT

Accurate attendance tracking is essential for all Modern Woodmen chapters, Summit chapters and youth service clubs. As a leader, you'll use Fraternal Connect to report attendance for every event or activity.

Fraternal Connect is available as a mobile app or online through [imakeanimpact.org](http://imakeanimpact.org). Find a [user guide with installation instructions and training modules](#) on the Training & Resources site (accessible through [imakeanimpact.org](http://imakeanimpact.org)).

Fraternal Connect tracks attendance of both members and guests. It also collects contact information and ensures the photo release policy is acknowledged if event photos are used publicly.

Reports you submit on [imakeanimpact.org](http://imakeanimpact.org) after an activity will be automatically populated with attendance information from Fraternal Connect.

#### To access Fraternal Connect via the web:

1. Go to [imakeanimpact.org](http://imakeanimpact.org) and select "Fraternal Connect."

2. Log in using the provided instructions.

#### To access Fraternal Connect via the mobile app:

1. Search for Fraternal Connect on the Apple App Store or Google Play.
2. Install and log in using the [instructions](#) available on the Training & Resources site.

#### To take attendance using Fraternal Connect:

1. Log in to Fraternal Connect using a laptop or cell phone (must be connected to Wi-Fi).
2. Select your upcoming activity. (This is populated from your activity request on [imakeanimpact.org](http://imakeanimpact.org).)
3. Check in members, guests and additional household members by searching for their names in the system.
4. Complete the check-in.

[Physical sign-in sheets](#) can be used during events when internet access is unavailable, but attendance information



must be transferred to Fraternal Connect afterward and within 30 days of the event. Each attendee should individually sign in to review and accept the photo release policy and update their information.

*Note: For activities held jointly between chapters or youth clubs, make sure each attendee is counted under **only one** group to avoid duplicate counts.*

### WHAT ABOUT LARGE EVENTS?

Tracking attendance at fundraisers and large public events can present challenges. Consider these approaches to make it easier:

**1. Use Fraternal Connect on multiple devices or stations.**

Setting up more than one check-in location may streamline the process for both leaders and attendees. This is the most accurate way to collect attendance information and gather photo releases.

**2. Use a physical sign-in sheet.** If your location lacks internet access or the crowd is too large, you may have attendees sign a [Modern](#)

[Woodmen attendance sheet](#). After the event, transfer the information to Fraternal Connect within 30 days.

**3. Encourage members to RSVP**

before the event and log them into Fraternal Connect ahead of time to save time when checking in attendees on-site. Update the list afterward to remove any no-shows. You can have members RSVP by contacting an activities or membership coordinator directly.

**4. Capture volunteer information.**

It may be difficult to sign in every person at a large public event. In those cases, keep a record of members who volunteered at the event using a [volunteer sign in sheet](#).

**5. Track ticket sales.** When selling discounted tickets as part of an activity, maintain a list of members who purchase tickets and the number of tickets sold. Record this information in Fraternal Connect within 30 days of the event for proper tracking.

### TRAINING & RESOURCES SITE ([accessible through imakeanimpact.org](#))

All fraternal leaders have access to a wide range of tools and support through the Training & Resources website. Access this site from the left navigation bar at [imakeanimpact.org](#).

The site is divided into sections for chapters, Summit chapters and youth service clubs. Key sections include:

• **Training modules & quizzes – Interactive tools to help you:**

- Learn the basics of your role.
- Dive deeper into fraternal leadership.
- Refresh your knowledge on important topics.
- Test yourself and build confidence.

• **Resources & materials – Essential documents to help you:**

- Successfully run your chapter or club.
- Engage with members and guests.
- Make an impact in your community.
- Access forms and policies quickly.

• **Discussion points & scripts – Ready-to-use scripts to:**

- Introduce yourself and Modern Woodmen.
- Explain your leadership role.
- Welcome guest speakers and new attendees.
- Keep everyone updated on events and activities.



# ACTIVITY TYPES

Modern Woodmen chapters, Summit chapters and youth service clubs can host a variety of event types, each with its own unique purpose and guidelines. In the following pages, you'll find detailed descriptions of each activity type.



# EDUCATIONAL EVENTS

**Description:** Educational events provide members with opportunities to learn and try new things. Leaders are encouraged to get creative, thinking about topics that interest their members the most.

**Examples of educational events include:**

- Guest speakers who are subject matter experts.
- Visits to zoos or botanical gardens with a special presentation.
- Hands-on classes, like flower arranging or arts and crafts.
- Tour of a park, community landmark or local business.

**Maximum per year:** Two.

**Premier status:** Requires hosting at least one educational event per year.

**Available funding:** Up to \$200 annually per chapter, Summit chapter or youth service club. You can request an advance if the cost to cover the event exceeds the amount of funds available in the chapter's bank account.

**Guidelines and proper use of funds:**

- You should use funds for materials and supplies directly related to hosting an event. Chapters can hold an educational event at a location of their choice. However, to receive educational event funding, members should be directly responsible for activity planning and organization.

- Funds can't be used for alcohol or firearms of any kind. Fees for safety classes are eligible.
- Common expenses include speaker/instructor fees, admission to museums and zoos, or materials for training. For example, chapters have hosted painting classes and used educational event funds to pay the instructor or reduce the course fee for members.
- Leaders should save receipts for all purchases. Copies of receipts are required when submitting activity reports.
- You can use a maximum of \$75 to purchase door prizes.
- Cash donations to organizations are not allowed.
- The Fraternal Department reserves the right to deny activities that don't include an educational component, violate guidelines for proper use of funds, or could jeopardize Modern Woodmen's tax-exempt status.

# HOMETOWN HERO EVENTS

**Description:** Hometown Hero events recognize individuals or groups who have made important contributions to a community, shown exceptional bravery, or gone above and beyond to positively impact the lives of others.

Honorees don't need to be Modern Woodmen members. Many honorees aren't in the public eye and quietly make a difference without asking for recognition.

**Examples of Hometown Hero events include:**

- Hosting a ceremony at the honoree's workplace.
- Recognizing the person during a community or athletic event.
- Collaborating with nearby chapters to hold a reception for multiple honorees and their guests.

**Maximum per year:** One.

**Premier status:** Requires hosting one Hometown Hero event per year.

**Available funding:**

- **Chapters/Summit chapters** – \$100 for the event plus a \$100 donation\* to the hero's chosen charity. You can request an advance if the cost to cover the event exceeds the amount of funds available in the chapter's bank account.
- **Youth service clubs** – \$50 for the event plus a \$50 donation\* to the hero's chosen charity.

*\*Donations to chosen charities are made after the activity report is approved in [imakeanimpact.org](http://imakeanimpact.org).*

**Guidelines and proper use of funds:**

- You can use funds for refreshments, decorations or event supplies.
- Using the Fraternal Department's certificate is optional. Chapter and Summit chapter funds can be used to purchase a different certificate frame or plaque for the recipient.
- Leaders must save receipts for all purchases. Copies of receipts are required when submitting activity reports.
- The Hometown Hero being honored should be a member of the chapter's local community.
- The Fraternal Department reserves the right to deny activities that violate guidelines for proper use of funds or could jeopardize Modern Woodmen's tax-exempt status.



# MATCHING FUND PROJECTS

**Description:** The Matching Fund Program offers the opportunity for your chapter or club to support a local organization, individual in need or community cause by hosting a fundraiser. Modern Woodmen then matches the dollars you raise up to the amount of Matching Funds available and approved in the activity request.

Your chapter can choose a potential recipient and plan your own event. Or you can form a community partnership with a local organization that's already hosting a fundraiser for an eligible cause.

**Examples of Matching Fund events include:**

- Partnering with a local fire department for their annual pancake fundraiser.
- Hosting a bake sale or spaghetti supper to raise funds for a family in need.
- Volunteering at a festival or event that donates proceeds to charity.
- Holding a pickleball tournament to support a local youth organization.
- Collaborating with a school PTA on their spring carnival or other fundraising event.

**Maximum per year:** None – a chapter/club can choose to divide their annual funding between multiple Matching Fund events.

**Premier status:** Requires hosting one Matching Fund project event per year.

**Available funding:**

- **Chapters/Summit chapters** – Up to \$2,500 matched annually.
- **Youth service clubs** – Up to \$500 matched annually.

**Guidelines and proper use of funds:**

- Modern Woodmen member involvement is encouraged whenever possible, whether partnering with an existing event or planning a brand new one.
- Chapters can use funds for event materials or donated supplies.
- Funds can't be used for alcohol, firearms or cash donations.
- A Matching Fund report and notarized Declaration of Funds Raised form must be submitted to the Fraternal Department within 30 days of the event. The Fraternal Department provides you with the necessary forms at the time an event request is approved.
- You should consult laws in your state related to raffles, auctions or other charitable gaming events before planning your fundraising event.
- The Fraternal Department reserves the right to deny Matching Fund events that could be considered advertising or sponsorships, violate guidelines for proper use of funds, or may jeopardize Modern Woodmen's tax-exempt status.

# SERVICE PROJECTS

**Description:** Service projects get members involved with hands-on volunteer activities that benefit your local community. Leaders choose service projects that match the interests of their members and relate to causes that are most relevant in their communities.

**Examples of service projects include:**

- Assembling kits for a local nonprofit or school (hygiene, sensory, mental health, etc.).
- Volunteering at a food bank.
- Collecting and distributing clothing items for those in need.
- Planting trees or landscaping at a park.
- Helping at a community festival.

**Maximum per year:** Unlimited.

**Premier status:**

- **Chapters** – Requires hosting three projects per year.
- **Summit chapters** – Requires hosting one project per year.
- **Youth service clubs** – Requires hosting six projects per year.

**Available funding:**

- **Chapters** – Up to \$1,000 per year. You can request an advance if the cost to cover the event exceeds the amount of funds available in the chapter's bank account.
- **Summit chapters** – Up to \$200 per year. You can request an advance if the cost to cover the event exceeds the amount of funds available in the chapter's bank account.
- **Youth service clubs** – Up to \$1,000 per year.

**Guidelines and proper use of funds:**

- You should not use service dollars for alcohol, firearms, door prizes, gift cards or expenses unrelated to the project.
- Making a cash donation to an organization is not allowed. To be approved, service projects require a hands-on component that could involve several members.
- A service project must benefit a local community, nonprofit organization or family/individual in need.
- The activity request on [imakeanimpact.org](http://imakeanimpact.org) should include an estimated cost of the project (materials, supplies, equipment, etc.).
- You must submit copies of receipts for all purchases related to the project when you submit an activity report on [imakeanimpact.org](http://imakeanimpact.org). Receipts are used to calculate a final project cost that's paid back to the chapter/club after the report is approved.
- The Fraternal Department reserves the right to deny projects or expenses that violate guidelines for proper use of funds or could jeopardize Modern Woodmen's tax-exempt status.
- **Chapters and Summit chapters** – You can use service funds to cover the cost of materials, equipment and supplies necessary to complete the project. While you may set aside a small amount to cover the cost of water, coffee or light snacks for volunteers, funds should not be used for meals.
- **Youth service clubs** – You can use service funds to purchase low-cost meals for volunteers.



# SOCIAL ACTIVITIES *(chapters only)*

**Description:** Social activities offer members an opportunity to gather and have fun in a relaxed setting. Leaders should consider hosting social events at places where their members already go or where they want to be (like somewhere new in town).

**Examples of social activities include:**

- Inviting members to a sporting event, offering discounted tickets.
- Hosting a reception with appetizers at a new local restaurant.
- Gathering at a park to make ice cream sundaes and play games.
- Setting up a tailgate tent at a high school football game.
- Visiting an apple orchard or pumpkin patch, offering discounted admission.

**Maximum per year:** Up to 12 per year.

**Premier status:** Requires hosting three social activities per year.

**Available funding:** \$2.50 reimbursement per attendee, up to the net event cost. You can request an advance if the cost to cover the event exceeds the amount of funds available in the chapter's bank account.

**Guidelines and proper use of funds:**

- Limit of two social activities per month.
- Social activities should be for Modern Woodmen members and their personally invited guests – not open to the public.
- Social funds are paid to the chapter after you submit the activity report on [imakeanimpact.org](http://imakeanimpact.org), and it's approved by the Fraternal Department. The reimbursement amount is limited to \$2.50 per attendee listed on the activity report, up to the cost of the event.
- Leaders must save receipts for all purchases. Copies of receipts are required when submitting activity reports.
- The Fraternal Department reserves the right to deny projects or expenses that violate guidelines for proper use of funds or could jeopardize Modern Woodmen's tax-exempt status.

# COMMUNITY DAYS *(Summit chapters only)*

**Description:** Community days bring members together for activities that promote health and social connections, with an optional service component.

**Examples of community days include:**

- Invite members to an area swimming pool and ask them to bring a nonperishable food item or school supplies as their admission.
- Host a special Christmas party where members bring new or unopened toys to donate to an angel tree family or nonprofit organization.
- Encourage members to make gifts for those in need by using their talents, like sewing, woodworking, etc.

**Maximum per year:** Up to 12 per year.

**Premier status:** Requires hosting five community days per year.

**Available funding:** \$2.50 per attendee, up to the net event cost.

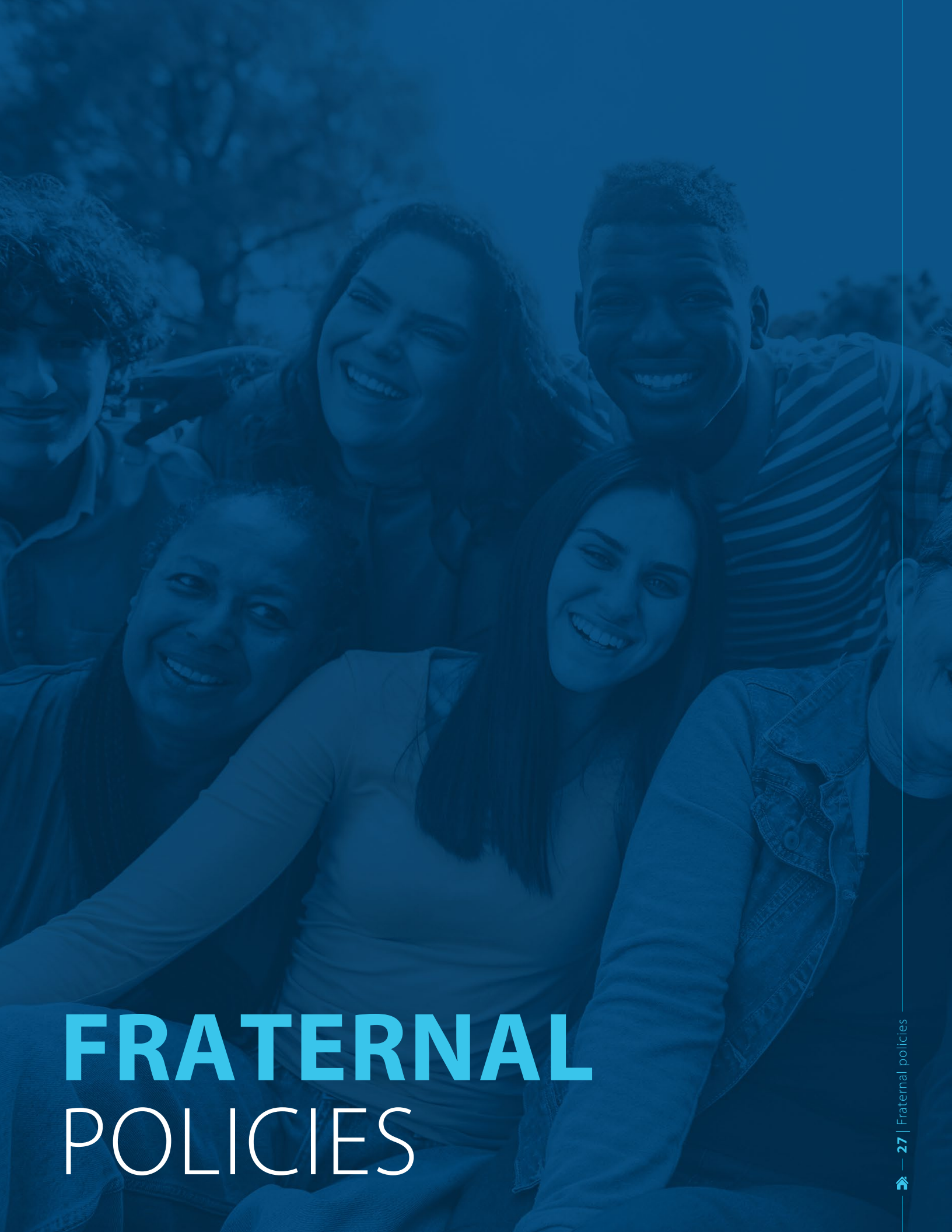
**Guidelines and proper use of funds:**

- Limit of two community days per month.
- Activities should be for Modern Woodmen members and their personally invited guests – not open to the public.
- Community day funds are paid to

the Summit chapter after you submit the activity report on [imakeanimpact.org](https://imakeanimpact.org), and it's approved by the Fraternal Department. The reimbursement amount is limited to \$2.50 per attendee listed on the activity report, up to the cost of the event.

- Leaders must save receipts for all purchases. Copies of receipts are required when submitting activity reports.
- The Fraternal Department reserves the right to deny projects or expenses that violate guidelines for proper use of funds or could jeopardize Modern Woodmen's tax-exempt status.





# FRATERNAL POLICIES

As a leader, you should familiarize yourself with [policies](#) that apply to all chapters, youth service clubs and fraternal activities. This will help ensure alignment with the mission of Modern Woodmen, the fraternal code and appropriate use of funds.

Follow the links below to access up-to-date information and guidelines for chapters, clubs and leaders.

### **ALCOHOL CONSUMPTION AT CHAPTER**

**FUNCTIONS** – This policy explains when alcohol consumption is allowed at chapter events and the importance of not using chapter or fraternal funds to pay for alcohol.

**BRANDING GUIDELINES** – Use these resources and guidelines to help design T-shirts, invitations and more that are compliant with Modern Woodmen brand standards.

**EQUIPMENT AND ASSETS** – Annually, activities coordinators must provide information about any equipment or assets owned by the chapter. This policy explains which types of equipment and assets must be reported, and how and when to report them.

**FRATERNAL RECIPIENT ELIGIBILITY** – This policy guides the allocation of resources for Matching Fund and service projects with information about eligible and ineligible recipients of monetary donation and volunteer service.

**FRATERNAL RITUAL** – Learn about traditional Modern Woodmen elements that chapters and clubs are encouraged to incorporate into social, educational and charitable events to foster unity and connection. This policy aims to create a cohesive and encouraging member experience.

**FRATERNAL DIGITAL MEDIA** – This policy explains which social media you can use to share information about chapter and youth club activities, and acceptable usage of each tool. It also provides steps to request a closed Facebook group for a chapter or youth club.

### **GIFT CARDS FOR FRATERNAL ACTIVITIES**

– Generally, chapter, youth club and fraternal funds should be used to purchase event materials, supplies, rental space and other tangible items, rather than making cash donations or purchasing cash equivalents, such as gift cards. This policy explains those situations in which purchasing gift cards is allowed and the amount of funds you can spend on gift cards.

### **GOVERNANCE AND USAGE OF ARTIFICIAL INTELLIGENCE AT MODERN WOODMEN**

– Modern Woodmen has developed this policy for the governance and usage of artificial intelligence (AI) for business purposes, along with a helpful [FAQ guide](#).

**INVITING LOCAL OFFICIALS** – To help Modern Woodmen maintain our tax-exempt status, we need elected officials on the state and federal levels to understand our impact. Learn ways you can reach out to legislators, inviting them to local Modern Woodmen events and telling them about the good you do in your community.

**JOINT ACTIVITIES** – Chapters and youth service clubs can come together to cohost fraternal activities throughout the year. While a majority of chapter or youth club activities should be held independently, this policy outlines what is required when you hold a combined event.

**LIABILITY COVERAGE** – Modern Woodmen’s corporate liability and property damage insurance covers groups in club- and chapter-sponsored events. This policy shares more information.

**MEDIA RESPONSE** – This policy provides information about the use of Modern Woodmen’s name, logo and endorsements. It also explains who can speak to the media on Modern Woodmen’s behalf and shares the media contacts at Modern Woodmen’s home office.

**MEMBER INVOLVEMENT** – Member involvement is essential for Modern Woodmen’s mission and tax-exempt status as a 501(c)(8) fraternal benefit society. This policy defines member involvement and outlines how to use chapter or club funding to support activities that bring members together for a shared purpose.

**TRAVEL EXPENSES REIMBURSEMENT** –

This policy provides fraternal leaders with guidance on travel reimbursements for events hosted by district or regional offices. There are separate policies for travel-related expenses for meetings and events hosted by Modern Woodmen’s home office.

**USE OF ELECTRONIC MONEY MANAGEMENT TOOLS** –

The Vibrant Credit Union website and mobile app can be used to manage chapter funds. Chapters and youth clubs can use crowdfunding platforms when necessary. However, payment platforms, such as PayPal, Venmo and CashApp should not be connected to chapter bank accounts. Review the policy for more details.





## WE WANT TO STAY IN TOUCH!

The Fraternal Department shares important news and updates with leaders frequently. Here's how to connect with us:



### **UPDATE YOUR EMAIL ON [IMAKEANIMPACT.ORG](https://imakeanimpact.org).**

Keep your email address current to receive activity confirmations, requests and announcements quickly.

- Log in to [imakeanimpact.org](https://imakeanimpact.org).
- Click on your name in the upper right.
- Select "Account."
- Update your information if needed.



### **READ THE MONTHLY FRATERNAL LEADER UPDATE EMAIL.**

These emails contain important news, tips and reminders for managing your chapter or youth club. If you aren't receiving these emails, check your spam or junk folder. And make sure we have your current email address.



### **JOIN THE MODERN WOODMEN FRATERNAL LEADERS FACEBOOK GROUP.**

Connect with fellow fraternal leaders, share ideas and get updates. Search "Modern Woodmen Fraternal Leaders" in Facebook Groups.



### **CHECK OUT IMPACT MAGAZINE.**

This quarterly magazine provides activity ideas, news and motivational stories. Find past issues and additional ideas on the [Activity Ideas](#) page of the Training & Resources site (accessible through [imakeanimpact.org](https://imakeanimpact.org)).



### **CONTACT OUR FRATERNAL SERVICE & PROGRAMS TEAM.**

For questions or assistance, reach out to the team at [fraternal@modern-woodmen.org](mailto:fraternal@modern-woodmen.org) or call 800-322-9805, Monday through Friday, 8 a.m. – 4:30 p.m. (Central).