

Touching lives. Securing futures.®

Fraternal Leader Handbook 2019

**MAKE AN
IMPACT!**

For Activities
Coordinators
and Club Leaders

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Foreword

Thank you for choosing to be a Modern Woodmen fraternal leader. You have selected a path that will enhance the lives of others and make a positive impact in your local community.

What Is Modern Woodmen of America?

Modern Woodmen of America is a member-owned fraternal financial services organization. We secure futures with financial guidance and products. We touch lives with fraternalism. Since 1883, Modern Woodmen has brought people together, supported families and strengthened communities nationwide.

Modern Woodmen chapters, Summit chapters and youth service clubs provide our members with opportunities to get involved in meaningful projects in their respective communities. They provide opportunities for our members to learn and grow. They also provide opportunities for our members to be a part of something special; a culture that cares, an environment that is fun and a family atmosphere that will enhance their lives. In 2017, Modern Woodmen provided \$21.6 million and 534,423 member volunteer hours for fraternal activities and programs nationwide.

What Makes Modern Woodmen Unique?

Modern Woodmen has more than 760,000 members in the United States. The individual actions of members make an important impact in communities nationwide.

Members of Modern Woodmen are joined by the common bonds of:

- Financial security for families.
- Quality family life.
- Community impact.

What Is a Fraternal Benefit Society?

As a fraternal benefit society, Modern Woodmen is a 501(c)8 tax-exempt organization that sells financial products and gives back to communities nationwide. Members are united by our common bonds and organized into chapters across the country, which provide a way for members to connect with one another and give back to causes they believe in. Learn more in the Member Involvement section on page 31.

What Is Make An Impact?

Make An Impact is a call to action. As a Modern Woodmen fraternal leader you have the opportunity to make an impact in your local community. By planning enjoyable volunteer, educational and social events for members, you will help develop a caring and respected Modern Woodmen culture in your community. Through your creative leadership, positive awareness for Modern Woodmen will grow. Greater awareness will help us increase our membership and provide needed resources – people and dollars – for a variety of local projects.

What Is Available in This Handbook?

This handbook outlines chapter, Summit chapter and youth club program guidelines and offers a variety of activity and project ideas. With the assistance of this handbook and our online training modules, we hope you find new and appealing ways to engage more members and better serve our communities.

These are exciting times at Modern Woodmen! Working together we will truly be able to “Make An Impact.” Thanks for all you do for Modern Woodmen, your fellow members and your communities.

CHAPTER ACTIVITIES

COORDINATOR SECTION



Purpose of a Chapter

Chapter activities are a fraternal benefit offered to Modern Woodmen members. Chapters encourage and support quality family life through fraternal activities and education. Chapters provide opportunities for service to others and positive community impact through local projects.

Who are the Chapter Members?

Chapter members are beneficial and social members of Modern Woodmen. A beneficial member has a life insurance or annuity certificate in his or her own name. A typical social member owns a product offered by a Modern Woodmen subsidiary but does not own a Modern Woodmen life insurance or annuity product. Social members have access to local chapter and youth service club activities and to some fraternal benefits.

Members may invite guests to attend chapter activities. A guest is defined as an individual who is neither a Modern Woodmen beneficial or social member. Ideally, after attending two or three events, guests should become members in order to continue participation in chapter activities. Read the “Member Involvement” page in the Key Policies area for more details.

Leadership Roles

Each chapter must be led by an activities coordinator and a chapter board. As the activities coordinator, your responsibilities include but are not limited to:

- Planning, requesting, promoting and leading monthly activities and community service projects for your chapter members.
- Striving to engage more of your chapter members throughout the year by holding a variety of events that offer meaningful experiences.
- Recruiting and working with a board of trustees. Enlist their help and the input of chapter members to achieve premier status.

- Reporting on your activities to Modern Woodmen.
- Carefully and responsibly managing chapter finances and records.
- Adhering to Modern Woodmen’s Principles of Conduct.
- Being an ambassador for Modern Woodmen in your local community.

See the Fraternal Leader Job Description in the Additional Resources section for more information.

Establishing a chapter board is a vital part of having a well-run, effective and relevant chapter.

Board members, who include four chapter officers and three at-large trustees, should be elected in December and appointed in January.

1. **Activities Coordinator***: Must be a beneficial member at least 18 years of age.
2. **President***: Presides at all business planning meetings of the board. Communicates passwords, appoints committees, and addresses all appeals subject to presidential review. Acts as a judge of all chapter elections. Performs all other duties as outlined in Modern Woodmen’s By-Laws. One-year term. Must be a beneficial member at least 16 years of age.
3. **Vice President***: In the absence of the president, performs all the duties of the president. One-year term. Must be a beneficial member at least 16 years of age.
4. **Membership Coordinator***: Responsible for encouraging current members and prospective members to attend chapter events. Serves as host at chapter events, welcoming members and guests. One-year term. Must be a beneficial member at least 16 years of age.
5. **At-large Trustees (3)**: Provide input and expertise to the chapter officers. Three-year term. Must be beneficial member at least 16 years of age.

*Positions required for a chapter board.



Go to the Training Materials page on **imakeanimpact.org** to access training modules on how to recruit and work with a chapter board.

Finances and Compensation

Activity Reimbursement

Activity	Reimbursement
Matching Fund	Modern Woodmen will match up to \$2,500
Hometown Hero	\$3 per attendee, up to the net cost of the event \$100 donated to organization recipient selects
Service Projects	\$1,000 pool of funds
Social Activity	\$2.50 per attendee, up to the net cost of the event
Educational Event	Up to \$200 to offset the cost of the event

Advances are available for: educational events, service projects, Hometown Hero and social activities.

Managing Chapter Funds

The activities coordinator manages the chapter's bank account, which is held in the name of the chapter at Modern Woodmen Bank.

The activities coordinator must account for all funds received and disbursed. The activities coordinator is responsible for the proper custody, disbursement, and use of all chapter funds and other property. Chapter funds may not be used for business marketing purposes.

If chapter bank account funds are used for equipment or other purchases, the chapter

board's approval must be obtained and documented. For more guidance, review the Chapter Equipment and Assets Policy in the Training Materials area of imakeanimpact.org.

Chapters are not allowed to use Modern Woodmen funds or funds from any chapter bank account to purchase alcohol for events. Nor are chapters allowed to use funds to purchase firearms. For more details, review the Activities Categories sections and Alcohol Consumption at Chapter Events policy.



Visit the Activity Categories section of this manual for a description of each activity category as well as guidelines and ideas.

Activities Coordinator Compensation

The activities coordinator will receive \$75 per activity for up to 12 activities per calendar year. The activities coordinator will have the option of receiving his or her pay on a monthly, quarterly, semiannual or annual basis.

Payments are made on the first of the month. For example, if you wish to receive your

payments quarterly, any activity reports approved in January, February and March will be paid on April 1.

To change the payment frequency, log into imakeanimpact.org. Click on your name in the upper right-hand corner. Select Account. Change the frequency under Payment Interval and click Update.



Go to the Training Materials page on imakeanimpact.org to access training modules on chapter finances.

Requesting and Reporting Activities

Submitting a Request

- File a request for every activity by logging on to: www.imakeanimpact.org. All requests must be preapproved by the Fraternal Department. The online request form will allow you to order supplies for your event.

- **Note: Requests must be submitted at least seven days prior to the event date. Requests must be submitted 30 days in advance if postcards are desired.**

- Enter the necessary information on the request form and check for errors before submitting the form.

Note: Chapters may hold up to three activities per month. A Matching Fund event is considered an activity.

Submitting a Report

- After your activity takes place, log on to www.imakeanimpact.org to complete an activity report form. To access an activity report:
 - Click on “New Report” in the left navigation bar and select the activity; or
 - From the dashboard, click on the three squares in the activity line then select “Report Activity.”

- Enter the requested information on the report and attach receipts and attendance sheets.
- Complete all event reports within 30 days. (Only two late reports will count toward premier status.)

What happens when you submit a request or report?

- When a request or report is submitted, it is assigned a due (“process by”) date and added to a work queue for the Operations Team to review and process in order by due date.
- Activity requests are assigned a due date that is 30 days prior to the event date unless the event will take place within 30 days. In that case, the due date and submission date are the same.
- If an activity request includes postcards, the assigned due date is three days prior to the selected postcard print date.
- Most activity reports are assigned a due date that is two weeks after submission.
- Matching Fund and Disaster Matching Fund reports are assigned a due date that is three days after submission.



Go to the Training Materials page on imakeanimpact.org to access training modules on submitting requests and reports.

Fraternal Achievement Program

Modern Woodmen encourages all chapters to achieve premier status each year. This ensures that our members are active, communities are benefitting and Modern Woodmen is fulfilling our requirements for tax-exempt status with the IRS.

Premier Qualifications

To attain premier status, a chapter must hold the events shown at the right between Jan. 1 - Oct. 31.

And ...

1. The chapter must have a board with at least three elected officers. Board members' names must be submitted through an online board report. One board report is required and a maximum of two are allowed between Nov. 1 and Oct. 31. Chapters will be reimbursed \$7 per board member (up to seven members) for any expenses associated with the board meetings.
2. All reports must be received by Dec. 1.
3. Submit activity reports within 30 days of the event date. Only two late reports will be allowed within the year.

1 Matching Fund project

1 Hometown Hero event

1 Educational event

3 Service projects

3 Social activities

9 events for premier status

Note: A chapter may choose to complete more than nine events during the year. Activities may be held in November and December, but they will not count toward premier.

Awards for Chapters

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



Go to the Training Materials page on imakeanimpact.org to access training modules on the Fraternal Achievement Program.

SUMMIT CHAPTER ACTIVITIES COORDINATOR SECTION



Purpose of a Summit Chapter

Chapter activities are a fraternal benefit offered to Modern Woodmen members. Chapters encourage and support quality family life through fraternal activities and education.

Who are the Summit Chapter Members?

Summit chapter members are beneficial and social members of Modern Woodmen who are 55 years of age or older. A beneficial member is a person who has a life insurance or annuity certificate in his or her own name. A typical social member owns a product offered by a Modern Woodmen subsidiary but does not own a Modern Woodmen life insurance or annuity product. Social members have access to local chapter and youth service club activities and to some fraternal benefits.

Members may invite guests to attend chapter activities. A guest is defined as an individual who is neither a Modern Woodmen beneficial or social member. Ideally, after attending two or three events, guests should become members in order to continue participation in Summit chapter activities. Read the "Member Involvement" page in the Key Policies area for more details.

Leadership Roles

Each chapter must be led by an activities coordinator and a chapter board. As the activities coordinator, your responsibilities include but are not limited to:

- Planning, requesting, promoting and leading monthly activities and community service projects for your chapter members.
- Striving to engage more of your chapter members throughout the year by holding a variety of events that offer meaningful experiences.
- Recruiting and working with a board of trustees. Enlist their help and the input of chapter members to achieve premier status.

- Reporting on your activities to Modern Woodmen.
- Carefully and responsibly managing chapter finances and records.
- Adhering to Modern Woodmen's Principles of Conduct.
- Being an ambassador for Modern Woodmen in your local community.

See the Fraternal Leader Job Description in the Additional Resources section for more information.

Establishing a chapter board is a vital part of having a well-run, effective and relevant chapter.

Board members, who include four chapter officers and three at-large trustees, should be elected in December and appointed in January.

1. **Activities Coordinator***: Must be a beneficial member at least 18 years of age.
2. **President***: Presides at all business planning meetings of the board. Communicates passwords, appoints committees, and addresses all appeals subject to presidential review. Acts as a judge of all chapter elections. Performs all other duties as outlined in Modern Woodmen's By-Laws. One-year term. Must be a beneficial member at least 16 years of age.
3. **Vice President***: In the absence of the president, performs all the duties of the president. One-year term. Must be a beneficial member at least 16 years of age.
4. **Membership Coordinator***: Responsible for encouraging current members and prospective members to attend chapter events. Serves as host at chapter events, welcoming members and guests. One-year term. Must be a beneficial member at least 16 years of age.
5. **At-large Trustees (3)**: Provide input and expertise to the chapter officers. Three-year term. Must be beneficial member at least 16 years of age.

*Positions required for a chapter board.



Go to the Training Materials page on **imakeanimpact.org** to access training modules on how to recruit and work with a chapter board.

Finances and Compensation

Activity Reimbursement

Activity	Reimbursement
Matching Fund	Modern Woodmen will match up to \$2,500
Hometown Hero	\$3 per attendee, up to the net cost of the event \$100 donated to organization recipient selects
Service Projects	\$100 pool of funds
Community Days	\$2.50 per attendee, up to the net cost of the event
Educational Event	Up to \$200 to offset the cost of the event

Advances are available for: educational events, service projects, Hometown Hero and community days.

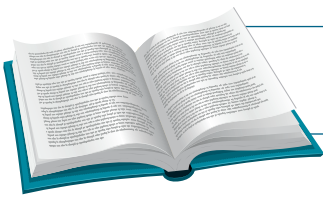
Managing Summit Chapter Funds

The activities coordinator manages the chapter's bank account, which is held in the name of the chapter at Modern Woodmen Bank. The activities coordinator must account for all funds received and disbursed. The activities coordinator is responsible for the proper custody, disbursement, and use of all chapter funds and other property. Chapter funds may not be used for business marketing purposes.

If chapter bank account funds are used for equipment or other purchases, the chapter

board's approval must be obtained and documented. For more guidance, review the Chapter Equipment and Assets Policy in the Training Materials area of imakeanimpact.org.

Chapters are not allowed to use Modern Woodmen funds or funds from any chapter bank account to purchase alcohol for events. Nor are chapters allowed to use funds to purchase firearms. For more details, review the Activities Categories sections and Alcohol Consumption at Chapter Events policy.



Visit the Activity Categories section of this manual for a description of each activity category as well as guidelines and ideas.

Activities Coordinator Compensation

The activities coordinator will receive \$75 per activity for up to 12 activities per calendar year. The activities coordinator will have the option of receiving his or her pay on a monthly, quarterly, semiannual or annual basis.

Payments are made on the first of the month. For example, if you wish to receive your

payments quarterly, any activity reports approved in January, February and March will be paid on April 1.

To change the payment frequency, log into imakeanimpact.org. Click on your name in the upper right-hand corner. Select Account. Change the frequency under Payment Interval and click Update.



Go to the Training Materials page on imakeanimpact.org to access training modules on chapter finances.

Requesting and Reporting Activities

Submitting a Request

- File a request for every activity by logging on to: www.imakeanimpact.org. Every request must be preapproved by the Fraternal Department. The online request form will allow you to order supplies for your event.
 - **Note: All requests must be submitted at least seven days prior to the event date. Requests must be submitted 30 days in advance if postcards are desired.**
- Enter the necessary information on the request form and check for errors before submitting the form.

Note: Summit chapters may hold up to three activities per month. A Matching Fund event is considered an activity.

Submitting a Report

- After your activity takes place, log on to www.imakeanimpact.org to complete an activity report form. To access an activity report:
 - Click on “New Report” in the left navigation bar and select the activity; or

- From the dashboard, click on the three squares in the activity line then select “Report Activity.”

- Enter the requested information on the report and attach receipts and attendance sheets.
- Complete all event reports within 30 days. (Only two late reports will count toward premier status.)

What happens when you submit a request or report?

- When a request or report is submitted, it is assigned a due (“process by”) date and added to a work queue for the Operations Team to review and process in order by due date.
- Activity requests are assigned a due date that is 30 days prior to the event date unless the event will take place within 30 days. In that case, the due date and submission date are the same.
- If an activity request includes postcards, the assigned due date is three days prior to the selected postcard print date.
- Most activity reports are assigned a due date that is two weeks after submission.
- Matching Fund and Disaster Matching Fund reports are assigned a due date that is three days after submission.



Go to the Training Materials page on **imakeanimpact.org** to access training modules on requesting and reporting activities.

Fraternal Achievement Program

Modern Woodmen encourages all chapters to achieve premier status each year. This ensures that our members are active, communities are benefitting and Modern Woodmen is fulfilling our requirements for tax-exempt status with the IRS.

Premier Qualifications

To attain premier status, a Summit chapter must hold the activities shown at the right between Jan. 1 - Oct. 31.

And ...

1. The Summit chapter must have a board with at least three elected officers. Board members' names must be submitted through an online board report. One board report is required and a maximum of two are allowed between Nov. 1 and Oct. 31. Chapters will be reimbursed \$7 per board member (up to seven members) for any expenses associated with the board meetings.
2. All reports must be received by Dec. 1.
3. Submit activity reports within 30 days of the event date. Only two late reports will be allowed within the year.

1 Matching Fund project

1 Hometown Hero event

1 Educational event

1 Service project

5 Community days

9 events for premier status

Note: A Summit chapter may choose to complete more than nine events during the year. Activities may be held in November and December, but they will not count toward premier.

Awards for Summit Chapters

Summit Chapter Membership	Premier
1-100 members	\$500
101-400 members	\$1,250
401+ members	\$1,500



Go to the Training Materials page on **imakeanimpact.org** to access training modules on the Fraternal Achievement Program.

YOUTH SERVICE CLUB LEADER SECTION



Purpose of a Youth Service Club

Club activities are a fraternal benefit offered to Modern Woodmen members. Clubs encourage young members to volunteer in their communities, learn new things, meet new friends and have fun! Youth clubs serve member families by supporting character development and improving hometown communities.

Who are the Youth Club Members?

Membership in a youth service club is offered to Modern Woodmen members who are under age 16. A beneficial member is a person who has a life insurance or annuity certificate in his or her own name. A typical social member owns a product offered by a Modern Woodmen subsidiary but does not own a Modern Woodmen life insurance or annuity product. Social members have access to local chapter and youth service club activities and to some fraternal benefits.

Members may invite guests to attend club

activities. A guest is defined as an individual who is neither a Modern Woodmen beneficial or social member. Ideally, after attending two or three events, guests should become members in order to continue participation in youth club activities. Read the “Member Involvement” page in the Key Policies area for more details.

Role of a Youth Club Leader

- Plan, promote and lead monthly activities and community service projects for youth members.
- Working with the club’s sponsoring agent, encourage guests to become members.
- Balance and track club funds.
- Utilize club funds in the best interest of the members.
- Request and report all activities.
- Strive to achieve premier status.

See the Fraternal Leader Job Description in the Additional Resources section for more information.

Finances and Compensation

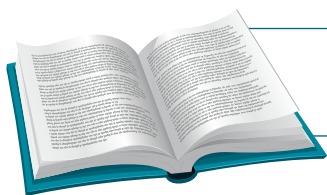
Youth Club Finances

Activity	Reimbursement
Matching Fund	Modern Woodmen will match up to \$500
Hometown Hero	Up to \$50 for the event \$50 donated to organization recipient selects
Service Projects	\$1,000 pool of funds
Educational Event	Up to \$200 to offset the cost of the event

Advances are available for: educational events, service projects and Hometown Hero.

Additional reimbursements are provided for:

- **Hall Rental (up to \$25):** Paid per activity when activity takes place in a public space that charges rent. Receipt required.
- **Postage (up to \$20):** Paid per activity as needed for mailing invitations or sending greeting cards as a service project. Receipt required.



Visit the Activity Categories section of this manual for a description of each activity category as well as guidelines and ideas.

Leader Compensation

The club leader will receive \$35 per activity up to 12 activities per calendar year. The club leader will have the option of receiving his or her pay on a monthly, quarterly, semiannual or annual basis.

Payments are made on the first of the month. For example, if you wish to receive your payments quarterly, any activity reports approved in January, February and March will be paid on April 1.

To change the payment frequency, log into imakeanimpact.org. Click on your name in the

upper right-hand corner. Select Account. Change the frequency under Payment Interval and click Update.

Assistant Leader Compensation

To have an assistant, attendance must average 10 members for six consecutive months. Assistant leaders must be 18 years old and a beneficial member. Assistant leaders will receive \$20 per activity for up to 12 activities per year. Assistants will receive their payments based on the pay frequency of the leader.



Go to the Training Materials page on imakeanimpact.org to access training modules on club finances.

Requesting and Reporting Activities

Submitting a Request

- File a request for every activity by logging on to: www.imakeanimpact.org. Every request must be preapproved by the Fraternal Department. The online request form will allow you to order supplies for your event.
 - **Note: Requests must be submitted at least seven days prior to the event date. Postcards are available to clubs for Matching Fund projects only, if the request is received at least 30 days in advance.**
- Enter the necessary information on the request form and check for errors before submitting the form.

Note: Youth clubs may hold up to three activities per month. A Matching Fund event is considered an activity.

Submitting a Report

- After your activity takes place, log on to www.imakeanimpact.org to complete an activity report form. To access an activity report:

- Click on “New Report” in the left navigation bar and select the activity; or
- From the dashboard, click on the three squares in the activity line then select “Report Activity.”
- Enter the requested information on the report and attach receipts and attendance sheets.
- Complete all event reports within 30 days. (Only two late reports will count toward premier status.)

What happens when you submit a request or report?

- When a request or report is submitted, it is assigned a due (“process by”) date and added to a work queue for the Operations Team to review and process in order by due date.
- Activity requests are assigned a due date that is 30 days prior to the event date unless the event will take place within 30 days. In that case, the due date and submission date are the same.
- If an activity request includes postcards, the assigned due date is three days prior to the selected postcard print date.
- Most activity reports are assigned a due date that is two weeks after submission.
- Matching Fund and Disaster Matching Fund reports are assigned a due date that is three days after submission.



Go to the Training Materials page on **imakeanimpact.org** to access training modules on requesting and reporting activities.

Fraternal Achievement Program

Modern Woodmen encourages all youth service clubs to achieve premier status each year. This ensures that our members are active, communities are benefitting and Modern Woodmen is fulfilling our requirements for tax-exempt status with the IRS.

Premier Qualifications

To attain premier status, a youth service club must hold the events shown at the right between Jan. 1 - Oct. 31.

1. All reports must be received by Dec. 1.
2. Submit activity reports within 30 days of the event date. Only two late reports will be allowed within the year.

1 Matching Fund project

1 Hometown Hero event

1 Educational event

6 Service projects

9 events for premier status

Note: A club may choose to complete more than nine events during the year. Activities may be held in November and December, but they will not count toward premier.

Premier Award for Clubs

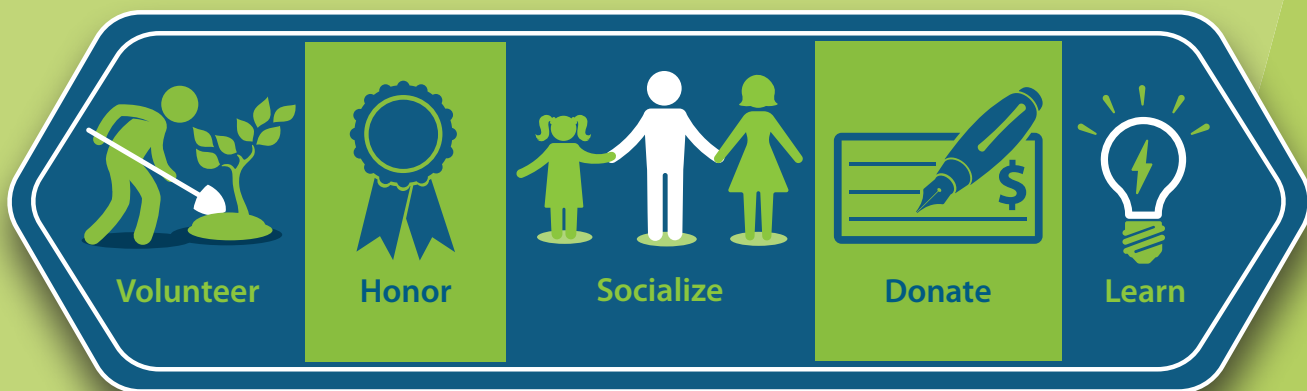
\$100 will be paid to the youth service club.

The leader and members should choose how these funds will be used by the club.



Go to the Training Materials page on **imakeanimpact.org** to access training modules on the Fraternal Achievement Program.

ACTIVITY CATEGORIES



Educational Events

Maximum per year: Two

Funding: Maximum of \$200 per year for chapters, Summit chapters and youth service clubs to cover the cost of the educational event.

Description

An educational event is an activity where members gather to learn about a specific topic or skill. Members can gain additional knowledge and information about topics of interest to them.

Guidelines

You must submit an activity request form at least seven days in advance and have the educational event preapproved by the Fraternal Department. Educational events must have an educational component to them. You may hold up to two educational events per year. Chapters, Summit chapters and youth service clubs will be reimbursed for up to \$200 per year.

Chapters may use chapter funds to cover costs in excess of the \$200.

Use of funds

Common uses of educational event funds include speaker or trainer fees, entry or admission fees to museums/zoos and materials needed for training. For example, chapters and youth clubs have hosted painting classes for members and used educational event funds to pay the instructor or reduce the course fee for members.

While some funds may be used to purchase door prizes, we would expect most of the funds to be used for materials and supplies directly related to hosting the educational event. Cash donations are not allowed.

Funds may not be used to purchase alcohol or firearms of any kind. However, funds may be used to cover fees for firearm safety and other similar classes.



Additional Resources

Impact magazine – This publication highlights fun and unique chapter, Summit chapter and youth service club activities from across the nation. Look for your issue of Impact every quarter.

Create Awareness

Maximize community impact by getting members involved. Use postcards and social media. Be sure to review our social media policy in the Additional Resources section.



Go to the Training Materials page on imakeanimpact.org to access a training module on educational events.

PREMIER STATUS REQUIRES ONE EDUCATIONAL EVENT PER YEAR.

Hometown Hero

Maximum per year: One

Funding

- Chapters and Summit chapters: \$3 per attendee for the event, up to the net cost of the event; \$100 donation to the hero's chosen charity (after activity report approved).
- Youth service clubs: Up to \$50 for the event; \$50 donation to the hero's chosen charity (after activity report approved).

Description

A Hometown Hero activity provides an opportunity to honor an individual or volunteer group for their outstanding service to the community or an act of bravery. The honoree need not, and in many cases will not, be a member of Modern Woodmen. We encourage you to select someone who normally does not receive recognition. The Fraternal Department offers an optional certificate and folder to present to the Hometown Hero. If a certificate is desired, the request must be received at least 14 days in advance.

After the report is approved, a check will be mailed directly to the Hometown Hero and made payable to the hero's charity. Please make sure you enter a complete and correct address for the hero.

Guidelines

You must submit an activity request form at least seven days in advance and have the Hometown Hero event preapproved by the Fraternal Department. The recipient must be a member of your local community.

We encourage the Hometown Hero to select a local nonprofit organization to receive the \$50 (clubs) or \$100 (chapters) donation. However, he or she may choose to donate the funds to an individual or family in need.

How to Successfully Honor a Hometown Hero

Follow these easy steps to plan a successful presentation:

Step 1: Pick your Hometown Hero. Ask your chapter board and members to nominate difference-makers in your community or contact a local nonprofit organization to nominate one of its regular volunteers.

Step Two: Complete an activity request form at imakeanimpact.org. Provide the name and mailing address of the Hometown Hero. (The Fraternal Department will mail the charity's check to the Hometown Hero.) Use postcard invitations, if available, and invite the honoree's friends and family.

Step 3: Hold the ceremony. Present the Hometown Hero certificate (optional) to the honoree. Save your receipts.

Step 4: Submit an activity report. Provide the name and address of the charity your Hometown Hero selected. Attach photos to your report.

Note: *Chapters and Summit chapters may use chapter funds to purchase a different certificate frame or a plaque for the recipient. The Fraternal Department's certificate is optional.*



Additional Resources

Impact magazine – This publication highlights fun and unique chapter, Summit chapter and youth service club activities from across the nation. Look for your issue of Impact every quarter.

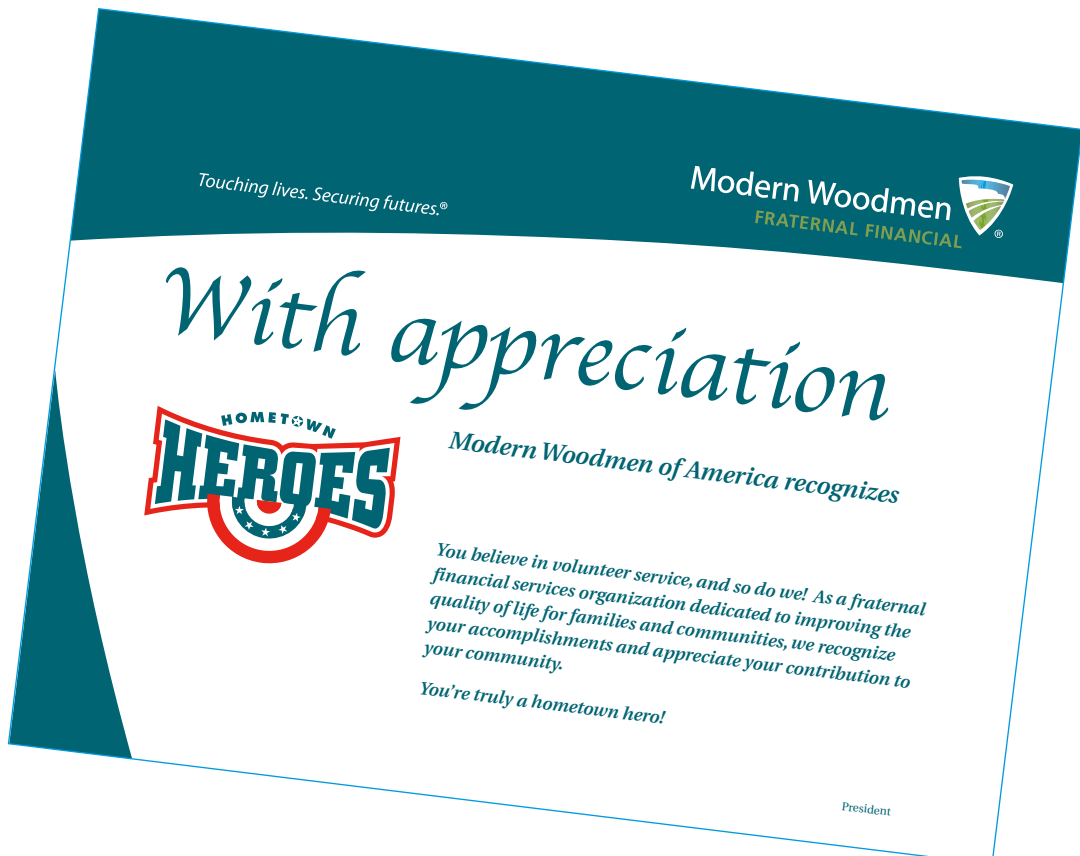
Create Awareness

Maximize community impact by getting members involved. Use postcards and social media. Be sure to review our social media policy in the Additional Resources section.



Go to the Training Materials page on **imakeanimpact.org** to access a training module on Hometown Hero activities.

PREMIER STATUS REQUIRES ONE HOMETOWN HERO EVENT PER YEAR.



Matching Fund Program

Maximum per year: None

Funding

- Chapters and Summit chapters: Up to \$2,500 matched per year.
- Youth Service Club: Up to \$500 matched per year.

Description

A Matching Fund project allows our members to support a local community cause or individual experiencing a catastrophic need by providing a match for money raised through a fundraising event.

Guidelines

We strongly encourage leaders to use postcard invitations for Matching Fund events, which requires submission at least 28 days prior to the event. If flyers are needed, the request must be submitted at least 14 days in advance. The minimum number of days needed is seven.

Chapters and youth clubs must provide the name of a recipient at the time of the request. The project recipient will be an individual/individual family, nonprofit organization or public entity that meets the guidelines laid out in the Fraternal Recipient Eligibility Policy on Page 32.

After the Matching Fund Event

- Within 30 days of the project, submit the Matching Fund Report online.
- Attach a signed and notarized Declaration of Funds Raised form to the report. No exceptions will be made.
 - The declaration form is available in the Training Materials area of imakeanimpact.org. Only the partner/recipient signature requires notarization. If the notary charges a fee, capture this as an event expense, or use existing chapter funds.

- Attach proof of attendance in the sign-in sheet area. (For more information about Tracking Attendance, visit the Additional Resources section.)
- Once the required forms are received, Modern Woodmen will send a check to the designated contact, payable to the recipient organization or family. The check may be presented at that time.
- A post-event media release template is available as well.
- If multiple chapters or clubs participate in the same project, the amount raised must be split among the participating chapters/clubs. Do not report the total amount raised on each chapter's or club's report.

Use of funds

Typically, chapters and youth clubs either purchase the materials and supplies needed to host a Matching Fund event, receive donations of materials/supplies, or partner with an organization hosting a fundraising event. Modern Woodmen matches the amount raised up to \$500 (youth clubs) or \$2,500 (chapters and Summit chapters).

Chapter funds may not be used to purchase alcohol or firearms of any kind for matching fund projects, including raffles. Chapters may accept donations of firearms if hosting a gun raffle. However, the firearm may not be an assault rifle or military-grade weapon. For details, read the Alcohol Consumption at Chapter Events Policy found in the Key Policies section or contact the Fraternal Department.



Additional Resources

Impact magazine – This publication highlights fun and unique chapter, Summit chapter and youth service club activities from across the nation. Look for your issue of Impact every quarter.

Create Awareness

Maximize community impact by getting members involved. Use flyers, postcards and social media. Be sure to review our social media policy in the Additional Resources section.



Go to the Training Materials page on imakeanimpact.org to access a training module on Matching Fund projects.

PREMIER STATUS REQUIRES ONE MATCHING FUND PROJECT PER YEAR.



Service Projects

Maximum per Year: Unlimited

Funding

- Chapters: Up to \$1,000 per year.
- Summit Chapters: Up to \$100 per year.
- Youth Service Clubs: Up to \$1,000 per year.

Note: These funds are not distributed as cash at the beginning of year. You will “draw down” from the available pool of funds as you request and report your service projects.

Description

Service projects provide opportunities for members to take action through a hands-on volunteer activity. Members perform actions such as painting, cleaning, collecting, assembling, etc. aimed at benefiting the local community.

Guidelines

You must submit an activity request form for all service projects at least seven days in advance of the event. Projects must be preapproved by the Fraternal Department. Additionally, each service project must follow these basic guidelines.

- Member involvement – The service project must provide opportunities for several members to participate. Working with the chapter board and members, make sure there are different tasks or roles for members to play in the project.
- Local community impact – The service project must benefit the local community or a local family or individual in need.
- Hands-on service component – The service project must include a hands-on service component where members are taking actions (painting, cleaning, collecting, assembling, etc.) aimed at benefiting the individual or community.

How It Works

- Each chapter or club has an allotment of funds available per year. (Note: The funds do not roll over from year to year.)
- Working with your board and members, determine which service project(s) to complete.
- Identify any materials, supplies or equipment that might be needed and estimate the cost of each service project.
- Submit an activity request for review and approval by the Fraternal Department.
- Once approved, hold the service project. Be sure to retain receipts for expenses and to have members sign attendance sheets.
- Submit an activity report. Attach receipts and attendance sheets.
- Once the report is approved, the final cost (expenses) of the project will be deducted from the available pool of funds. See the illustration below for an example.

Use of Funds

The Fraternal Department will not determine how much funding is needed for your project. You will tell us how much is needed. Service project funds may be used to purchase supplies and materials necessary to complete the hands-on volunteer project. You may set aside a small amount to cover the cost of water, coffee or light snacks (i.e. granola bars) for your volunteers. Funds may not be used for meals, alcohol, firearms, door prizes or unnecessary expenses. Cash donations are not allowed. If you are uncertain about how to use service project funds, please contact the Fraternal Department.

Eligible Recipients

The recipient of a service project should be a local public or nonprofit organization, or an individual/family in need. Please refer to

the Fraternal Recipient Eligibility Policy found in the Key Policies section.

Service Project Fund balance (Jan. 1) \$1,000	Amount requested \$200		Actual spent \$200	New balance \$800	Amount requested \$425		Actual cost* \$400	New balance \$400
	Activity request submitted and approved	Project held	Activity report submitted and approved		Activity request submitted and approved	Project held	Activity report submitted and approved	

**If the unused \$25 was received as an advance, you may choose to return the funds or keep it for your next service project.*



Additional Resources

Impact magazine – This publication highlights fun and unique chapter, Summit chapter and youth service club activities from across the nation. Look for your issue of Impact every quarter.

Create Awareness

Maximize community impact by getting members involved. Use postcards and social media. Be sure to review our social media policy in the Additional Resources section.



Go to the Training Materials page on **imakeanimpact.org** to access a training module on service projects.

PREMIER STATUS REQUIREMENTS:

CHAPTERS: 3

SUMMIT CHAPTERS: 1

YOUTH SERVICE CLUBS: 6

Social Activities (chapters only)

Maximum per year: 12

Funding

\$2.50 per attendee, up to the net cost of the event.

Description

Everyone enjoys a friendly get-together, and Modern Woodmen members are no exception. Chapters can host a variety of fun and engaging social activities for their members. Tailor social activities for your chapter to the customs and preferences of your members.

Guidelines

You must submit an activity request form for all social activities at least seven days in advance of the event. Activities must be preapproved by the Fraternal Department. Additionally, each social activity must follow these basic guidelines:

- Drive-through/take-out meals are prohibited.
- Social activities should be for Modern Woodmen members and their personally invited guests.
- Although you are allowed to hold up to three activities each month, only two of those events can be social activities.

Examples of Social Activities

Chapters are encouraged to hold a variety of fun social activities for their members. Below are just a few of many ideas for social activities.

💡 Host a new member welcome reception at the new restaurant(s) in town. It is a great way to support a local business and make a new connection.

💡 Take an excursion to a farm, apple orchard or other local area. Use funds toward reducing the admission or cost of purchasing items from the gift shop. Add an educational component by asking for a demonstration of how to use the items to make a meal. The chapter/club will only get credit for one type of activity (social or educational) but it does not hurt to have fun and learn at the same time.

💡 Hold a Modern Woodmen Spirit event where the members wear a Modern Woodmen hat or shirt and receive a portion off of their meal. You can also raffle off Modern Woodmen items for them to wear at the next spirit event!

For more ideas, take a look at our list of 101 Event Ideas and past issues of Impact magazine in the Training Materials area on imakeanimpact.org.



Additional Resources

Impact magazine – This publication highlights fun and unique chapter, Summit chapter and youth service club activities from across the nation. Look for your issue of Impact every quarter.

Create Awareness

Maximize community impact by getting members involved. Use postcards and social media. Be sure to review our social media policy in the Additional Resources section.



Go to the Training Materials page on imakeanimpact.org to access training modules on postcard examples and increasing member engagement.

PREMIER STATUS REQUIREMENTS: 3 (CHAPTERS ONLY).

Community Days (Summit chapters only)

Maximum per year: 12

Funding

\$2.50 per attendee, up to the net cost of the event.

Description

Activities that facilitate camaraderie and sharing with others promote good physical and mental health, and surveys indicate social relationships are especially vital to those in the 55-plus demographic. Summit chapters have regular opportunities to provide these types of activities to Modern Woodmen members through community days. Community days, which are similar to social activities for chapters, help Summit chapter members make connections with others and make a unique contribution by tapping into their gifts and talents.

Guidelines

You must submit an activity request form for all community days. Community day activities must be preapproved by the Fraternal Department. Additionally, each activity must follow these basic guidelines:

- Include a service component such as donation of a canned good.

- Drive-through/take-out meals are prohibited.
- Community days should be for Modern Woodmen members and their personally invited guests.
- Although you are allowed to hold up to three activities each month, only two of those events can be community days.

Examples of Community Days

Below are a few ideas to help you plan your event. This is not an exhaustive list. We encourage you to use these ideas as a guide along with input from your members.

💡 Host a day at an area swimming pool. Ask members to bring a non-perishable food item or school supplies as their admission.

💡 Celebrate the holidays by holding a holiday dinner or party. Collect new or unopened toys to donate to an angel tree family or organization. Encourage members to make gifts as well by using their talents sewing, woodworking, etc.

For more ideas, take a look at our list of 101 Event Ideas and past issues of Impact magazine in the Training Materials area on imakeanimpact.org.



Additional Resources

Impact magazine – This publication highlights fun and unique chapter, Summit chapter and youth service club activities from across the nation. Look for your issue of Impact every quarter.

Create Awareness

Maximize community impact by getting members involved. Use postcards and social media. Be sure to review our social media policy in the Additional Resources section.



Go to the Training Materials page on imakeanimpact.org to access training modules on postcard examples and increasing member engagement.

KEY POLICIES

**MAKE AN
IMPACT!**

MEMBER INVOLVEMENT

Tax Exemption

As a fraternal benefit society, Modern Woodmen is a 501(c) (8) tax-exempt organization that sells financial products and gives back to communities nationwide. Our members are united by three common bonds: financial security, quality family life and community impact.

Funding for the Modern Woodmen fraternal system and programs is assisted by tax exemptions given to fraternal benefit societies by the U.S. Congress and legislators from all 50 states. The exemption allows Modern Woodmen and other fraternal benefit societies to host social and educational activities for members and organize members to support local community causes through fundraisers and volunteer service projects.

For more information about fraternal benefit societies, take a look at this helpful [video](#).

Member Involvement

Modern Woodmen is a membership-based organization. Chapter and youth club activities are a member benefit. Member involvement in chapter and youth club activities is a key requirement for our tax-exempt status. Event invitations should be sent to members only.

For tips on how to increase member engagement, visit the Training Materials area on imakeanimpact.org.

Guest Attendance

A guest is defined as someone who does not have an active Modern Woodmen certificate or social membership. Members may invite guests to activities; however, a guest should not be a regular attendee without eventually becoming a member. The fraternal leader should try to ensure there are many more

members at activities than guests. Our recommendation is to strive for at least a 3:1 ratio of members to guests.

Chapter and youth club activities are private events. Invitations should never be directed to the general public except for Matching Fund projects.

Increase Member Engagement

Members want to be involved in activities, but they may not attend every event. That's OK! These five tips can help you engage both regular attendees and members who participate just a few times a year.

- 1. Know who your members are and plan activities they will enjoy.** Chapter rosters are available on the chapter dashboard on imakeanimpact.org. Youth club leaders can access the Youth Club Roster report in the Reporting area.
 - 2. Use available invitation options.**
 - a. Submit activity requests at least 30 days in advance and select postcard invitations.
 - b. Contact the Fraternal Department to start a closed Facebook group.
 - c. Remind members about upcoming events.
 - 3. Gather input.** Ask members for ideas for future activities, local heroes to recognize, or a new skill to learn.
 - 4. Offer variety.** Members expect variety. View this [infographic](#) for more information about what members want.
 - 5. Show appreciation.** Thank members for attending. Be mindful of their time. Recognize their volunteer accomplishments. And remind them Modern Woodmen is here because of them.
- Check out activity ideas in [Impact magazine](#) and the Fraternal Leader [closed Facebook group](#).

Tracking Attendance

Tracking attendance or participation in fraternal activities is a requirement for all activity categories. We recognize that the nature of Matching Fund events and large-scale, public events make this difficult. Therefore, we've developed some examples of how your chapter or club might approach documenting participation in these types of events.

1. Take attendance at Matching Fund events with one of these methods.

- Have each individual attending the event – members and nonmembers – sign the Modern Woodmen attendance sheet. This sign-in sheet is required if you want to use photos from the event on Facebook or with a media release. (Please review the Fraternal Social Media Guidelines for more information.)
- Take attendance for members only at the Matching Fund event.
- Use other documentation like a spreadsheet or simple list – possibly a document used by the primary person organizing the event – to track the members attending the Matching Fund event. You do not have to use the attendance sheets supplied by the Fraternal Department.
- List the members who volunteered at the Matching Fund event.
- List the members whom you know attended the event.

2. Choose one of these options to take attendance at large-scale, public events.

Attendance is required at chapter, Summit chapter and youth service club activities in which you want a reimbursement. Here are ways to take attendance at large-scale, public events.

- Ask members to RSVP prior to the event and keep a list of members who are coming.
- Use other documentation like a spreadsheet or simple list to track the members attending the event. You do not have to use the attendance sheets supplied by the Fraternal Department.
- Have one adult member sign in for the entire family. Simply record the member's name and number of people in his/her family.
- Have each individual attending the event – members and nonmembers – sign in on the Modern Woodmen attendance sheet. While this current method may not work at some events, we encourage you to use it whenever possible. It provides contact information about members and guests and includes the photo release policy. This sign-in sheet is required if you want to use photos from the event on Facebook or with a media release. (Please review the Fraternal Social Media Guidelines for more information.)



Go to page 39 to learn about the attendance tracking tool available through imakeanimpact.org.

Alcohol Consumption at Chapter Functions Policy

Having alcoholic beverages at Modern Woodmen chapter and Summit chapter events may create problems for Modern Woodmen, chapter activities coordinators and its members. Modern Woodmen permits alcohol in moderation and when appropriate for the members attending the event subject to the following rules.

Any consumption of alcohol should not endanger the safety of any individual, violate applicable law, or lead to impaired performance or inappropriate behavior that could be detrimental to Modern Woodmen.

Payment for Alcoholic Beverages Not Allowed

- Modern Woodmen does not provide funds or reimburse chapters directly for alcoholic purchases at chapter events. For example, chapters will not be reimbursed for drink tickets.
- Chapters are not allowed to use funds from any chapter bank account to purchase alcohol for chapter events. Members and guests are responsible for purchasing their own alcoholic beverages.

Approved Use of Alcohol at Chapter Events

- Alcohol may be served at chapter events which are held in appropriately licensed facilities, with drinks served by individuals employed by the facility or employed by another third-party with the appropriate liquor license and insurance coverage. Members and guests are responsible for purchasing their own alcoholic beverages (i.e. cash bar).

- At tours of wineries, distilleries or other venues involving alcoholic beverages, chapters can be reimbursed up to the appropriate amount specified for the activity and/or use chapter funds to pay for admission/sampling charges. Additional purchases of alcoholic beverages beyond a sampling (typically one ounce) is the responsibility of the individual member or guest.
- When alcoholic beverages are included in a total food and beverage cost, chapter reimbursements and/or chapter funds are intended to cover the cost of food and non-alcoholic beverages only.

Not Approved Use of Alcohol at Chapter Events

- Chapters are not allowed to sell alcohol. If alcohol will be sold, it should be sold by a licensed third party (example: restaurant).
- Chapters are not allowed to serve alcohol. If alcohol will be provided, it should be served by a third party with the appropriate liquor license and insurance coverage.
- Chapters are not allowed to purchase their own liquor license or dram shop insurance. Any chapters that have a liquor license as of April 1, 2017, have been grandfathered under this policy.

Applying the Policy

- Members and guests who choose to drink alcoholic beverages at chapter functions are expected to act responsibly.
- The chapter activities coordinator is responsible for ensuring adherence to these guidelines. The activities coordinator must be present at the function for the duration of the event.
- It is recommended that food should also be available at the event.
- The sale, availability or distribution of alcoholic beverages to anyone under the age of 21 is strictly prohibited at chapter functions.

Fraternal Recipient Eligibility Policy

Effective September 1, 2018

Modern Woodmen of America is a membership organization, providing its members opportunities for service to others and positive community impact through local volunteer projects. Our members hold a broad array of views and beliefs; however they share a common desire to positively impact their local communities.

The Fraternal Recipient Eligibility Policy applies to recipients of the Matching Fund and Service Project programs. Chapter and club leaders, as well as the chapter board of trustees, are encouraged to adhere to the policy when they allocate chapter or club resources in their local communities.

While some organizations or projects are not eligible for Modern Woodmen's fraternal programs, Modern Woodmen's decisions are not intended to diminish the importance of particular organizations or causes to our members. Modern Woodmen encourages members to directly support organizations and causes they care about.

Eligible Recipients

The following types of organizations are eligible recipients:

- Local not-for-profit organizations or municipalities addressing specific community needs.
- Individual/family in the local community with a catastrophic need.

Ineligible Recipients

The following types of organizations are ineligible to be recipients of Modern Woodmen fraternal programs:

- Colleges and universities.
- Endowment funds.
- For-profit businesses.
- National organizations (however, local affiliates are eligible).
- Organizations or causes with a principal purpose to influence legislation or policy.
- Organizations that re-grant funding to other organizations. Programs provided by these organizations may be considered eligible, at the sole discretion of Modern Woodmen, if the programs deliver a service to individuals in the local community.
- Political organizations (partisan groups or those supporting specific candidates or political positions) or campaigns.
- Places of worship (churches, synagogues, mosques, and other houses of worship). Faith-based organizations are considered eligible, if the organization has its own tax ID number.
- Religious-based mission trips.
- Scholarship programs.

Modern Woodmen donations may not be used to increase an organization's general operating fund or treasury. There must be an identifiable, program-specific need. In addition, Modern Woodmen reserves the right to deny any organization, individual or project that positions Modern Woodmen in a negative light or that Modern Woodmen considers noncompliant with the law, controversial, or otherwise incompatible with its mission.

Media Response Policy

Modern Woodmen of America's Media Response Policy reflects the organization's desire to promote a positive image of Modern Woodmen and its subsidiaries. The policy also allows Modern Woodmen to provide accurate information to the media in a timely fashion, while adhering to legal and other requirements and protecting Modern Woodmen's reputation.

The Media Response Policy applies to the following individuals:

- Employees of Modern Woodmen and its subsidiaries.
- Field representatives.
- Chapter officers.
- Youth club leaders.

Definition of Media

Modern Woodmen defines the media as a channel through which news, education, data, entertainment or promotional messages are disseminated. Media includes every broadcasting and narrowcasting medium such as newspapers, magazines, TV, radio, billboard, direct mail, telephone, fax and Internet (including social media sites). [Source: BusinessDirectory.com.]

Speaking on Behalf of Modern Woodmen

No employee or representative of Modern Woodmen should communicate to the media about Modern Woodmen without the appropriate authority and/or approval from the Corporate Communications Department.

Personal Representation in the Media

Occasionally employees and representatives of Modern Woodmen may be approached by the media to speak about topics related to their personal interests or non-work related activities. To avoid confusion that you are speaking on behalf of Modern Woodmen, do not reference Modern Woodmen or your role

with Modern Woodmen – unless you have obtained prior approval from the Corporate Communications Department.

Using Modern Woodmen's Name, Logo and Endorsements

In general Modern Woodmen does not allow use of its name or logo in print or electronic documents of suppliers, consultants, business partners or other third parties without prior approval. Use of Modern Woodmen's name or logo to endorse or promote any product, opinion, cause, political candidate, etc., is also not allowed.

Please refer all requests to use Modern Woodmen's logo or its subsidiaries' logos to the Corporate Communications Department, which will work with the appropriate internal authorities to review requests.

Handling Negative Comments Found on Social Media Sites

If you find negative or disparaging comments about Modern Woodmen or its subsidiaries online, please forward those comments to the Corporate Communications Department. Do not respond to the negative postings yourself.

The Corporate Communications Department will determine the best course of action, working with subject matter experts, to handle the negative postings. In some situations the best course of action may be to not respond and to monitor the situation.

How to Handle Requests from the Media

1. Responding to media phone calls

Refer all unsolicited phone calls from the media to Michelle Opsahl in the Corporate Communications Department, ext. 5660.

The Corporate Communications Department will follow up with the media to

determine the nature of the phone call and how best to handle the media's questions. In some cases the Corporate Communications Department will ask specific employees or agents to answer the media's questions. The Corporate Communications Department may choose not to respond to the media's questions, if that course of action is in the best interest of Modern Woodmen.

2. Conducting planned interviews with the media

At times representatives of Modern Woodmen have opportunities to participate in live or taped interviews with the media or to talk to a reporter for an article/segment about Modern Woodmen. The Corporate Communications Department must preapprove all planned interviews that discuss Modern Woodmen in any way or reflect on your relationship with Modern Woodmen.

The Corporate Communications Department will review all potential media interviews for appropriateness of topics, media outlet, audience and individual to be interviewed.

In addition to approving all interview opportunities, the Corporate Communications Department can help you prepare for the interview.

3. Responding to questions from the media when a Modern Woodmen-created media release (sent by you or Modern Woodmen) initiated the communication

If you lead a Modern Woodmen club or chapter – You can communicate directly with the media about your specific activities. It is recommended that you use approved, pre-written media releases from Modern Woodmen whenever possible. Please remember to speak only about your personal

experience. Do not imply that you speak for the entire organization.

If you are a Modern Woodmen field representative – Modern Woodmen representatives can respond to questions from the media regarding media releases distributed by the representative and/or Modern Woodmen. Please remember to speak only about your personal experience. Do not imply that you speak for the entire organization.

4. Handling a crisis

Immediately direct any phone calls from the media regarding a crisis situation to the Corporate Communications Department. Do not respond to the media yourself, unless you receive approval from the Corporate Communications Department.

The Corporate Communications Department defines a crisis as any situation that:

- Has resulted or may result in significant damages to home office facilities.
- Has resulted or may result in death, injury, health or safety problems for the public or employees.
- Disrupts operations.
- Calls into question Modern Woodmen's workplace, fraternal and/or field practices.
- Calls into question Modern Woodmen's ability to meet its obligations to members.
- Calls into question the integrity of Modern Woodmen, its people, or its products and services.

Questions

If you have questions about the Media Response Policy, please contact Jill Lain Weaver, chief fraternal officer, at ext. 5651 or Sharon Snawerdt, corporate communications manager, ext. 5630.

Fraternal Social Media Policy

Social media and other online communication systems are vital tools in our fast-moving, tech-savvy world. Modern Woodmen of America's Fraternal Department has developed the following policy for those involved with our chapters, Summit chapters, and youth service clubs to ensure they are using social media in a way that is safe, effective and consistent with Modern Woodmen's other policies. If you plan to utilize social media for fraternal purposes, you must abide by this policy.

This policy establishes guidelines for:

- Chapter activity coordinators and board members
- Summit chapter activity coordinators and board members
- Youth service club leaders and assistant youth club leaders

Field staff not operating as any of the roles indicated above should refer to the Field Social Media Policy for instruction.

Modern Woodmen approved the use of Facebook for fraternal purposes and requires the individuals listed above follow the guidelines below. Please refrain from using other social media, including Twitter, blogs, MySpace, message boards and LinkedIn for fraternal purposes.

Closed Groups

Chapters, Summit chapters and youth service clubs may use closed groups within Facebook for their chapter or youth club.

Closed groups are private spaces where you can share updates and photos, and message other group members. This enables you to:

- Post invitations to upcoming chapter or youth club events.
- Poll members to gain insight and ideas for future events.

- Gather feedback about past activities.

Membership to a closed group must be restricted to Modern Woodmen members only.

Setting up a Closed Group

Leaders of chapters and youth clubs who wish to use the closed group must follow these procedures:

1. Contact the Fraternal Department to request a closed group. Email fraternal@modern-woodmen.org.
2. The Fraternal Department will "friend" you in Facebook.
3. Once you accept the friend request, the Fraternal Department will create the closed group. You will be assigned as an administrator for the group and be set up with the appropriate privacy settings. A member of the Fraternal Department must also serve as co-administrator.
4. Invite members of your chapter or youth service club to join the closed group. **Please ensure that only Modern Woodmen members are included.** Verify an individual's membership using the chapter roster. (Youth service club leaders can view lists of Modern Woodmen members based on chapter or zip code, at www.imakeanimpact.org.)
5. Post regular updates on the closed group page to keep members informed about upcoming and recent activities. Other members in the group can post updates, but they must be approved by an administrator before appearing on the feed.
6. If/when you no longer serve as the chapter activities coordinator or youth club leader, please notify the Fraternal Department to remove the group or to transfer the group to the new chapter/club leader.

Posting Photos in Closed Groups

Modern Woodmen takes the privacy of its members very seriously. If you wish to take photos of fraternal activities, you must ensure that individuals in the photos have granted their consent. This can be done in one of two ways:

- Verify that all attendees at chapter or youth club activities have signed in on the Activity Sign-In sheet and have given their permission to use their image in a photo. (If an individual wishes to not be photographed, it is your responsibility to ensure they are not in any photos.)
- For activities not involving a sign-in sheet (i.e. delivery of a Matching Fund check), please ensure all individuals in a photo have completed a Photo Release Form. The form is available on www.imakeanimpact.org or by contacting the Fraternal Department at 800-322-9805. The completed forms should be returned to the Fraternal Department, with the appropriate chapter or youth club number indicated.

Please do not tag or otherwise identify individuals in the photo.

Important note: Chapter and youth service club leaders who are not Modern Woodmen representatives may only post photos on a Facebook closed group page. They may not post photos on a personal or business page in Facebook or on photo sharing sites like Instagram. Representatives should refer to the Field Social Media Policy for posting photos on a Modern Woodmen business page.

Business or Cause Pages

Do not set up a unique business or cause page for your chapter or youth service club.

Questions?

If you have questions about the Fraternal Social Media Policy, please contact the Fraternal Operations team at 800-322-9805.

ADDITIONAL RESOURCES

**MAKE AN
IMPACT!**

Make An Impact Website



As you lead your local Modern Woodmen chapter, Summit chapter or youth service club, the Make An Impact website will put more information – and tools – at your fingertips. Simply go to www.imakeanimpact.org. You can continue to call the Fraternal Department at (800) 322-9805 for answers to your questions. We're here to help.

It's more than just a website. When you log in at www.imakeanimpact.org, you'll find a system to help you manage information and activity for your club or chapter. Its design is intuitive and simple to navigate, including messages, popups and reminders. When you log in, you'll be able to:

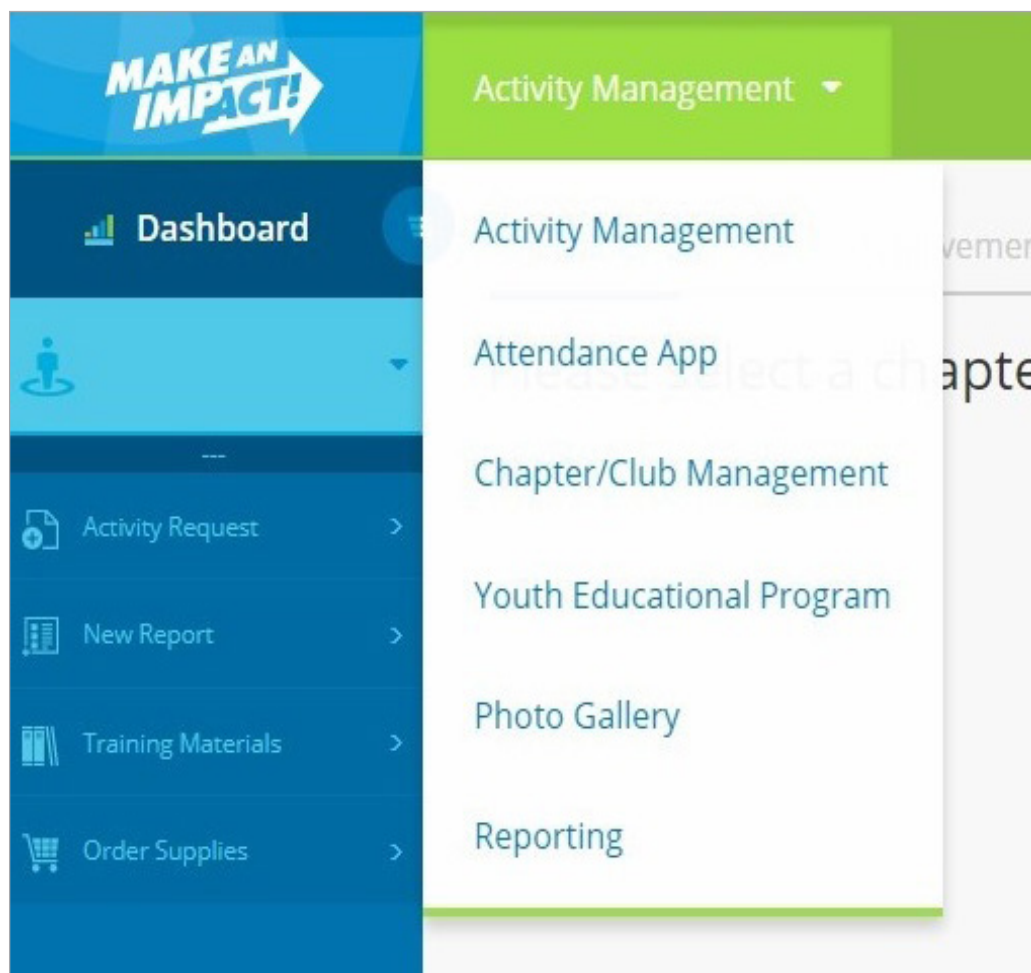
1. Draft, edit and submit activity requests and reports.
2. Review the history and status of requests and reports from the dashboard.
3. Navigate among chapters, Summit chapters and youth service clubs if you are the leader for more than one.
4. Submit attendance sheets, receipts and photos.
5. View the number of members in your chapter or club and average attendance.
6. Track progress toward premier status.
7. Check chapter bank account balance.
8. View available educational event, service project and matching funds.
9. Access the training materials page, which includes training videos, written guides, activity ideas and important downloadable forms (e.g. Manager's Acknowledgment).
10. Order supplies.

Attendance Tool

Use the web-based Attendance Tool to track attendance online during your chapter or youth club activity. Your event attendance will be automatically saved to the activity report in

imakeanimpact.org. Visit the Training Materials page on imakeanimpact.org for a step-by-step training guide on using the Attendance Tool.

Go to imakeanimpact.org and select Attendance App from the drop-down menu.



Youth Educational Programs

Since 1948, Modern Woodmen has supported schools and other youth-oriented groups with its free youth educational programs. These curriculum-enhancing programs are a great way Modern Woodmen members and youth service clubs can reach beyond our membership to help others and live out the spirit of fraternalism.

The comprehensive, educational tools cover five important topics.

The **Ecology Awareness Program** teaches children to become good stewards of the earth. Through the program, children learn a commonsense approach to preserving the environment through hands-on activities. They also take home useful, educational souvenirs.

The **Exercise and Nutrition Program** helps children make good food choices and learn the value of exercise. It's ideal for the classroom and ties to national teaching standards. Children who participate receive jump ropes and educational bookmarks.

The **Financial Literacy Program** lays the foundation for successful money management by providing young people opportunities to gain age-appropriate knowledge and skills for today and the future.

The **Patriotic Civics Program** instills patriotic pride while teaching civics and American history. It ties to national teaching standards, and lessons are reinforced with

music. Each child receives a workbook and photo magnet.

The **School Speech Contest** provides a valuable personal and academic experience for more than 90,000 participants each year. Students compete within their local schools and receive participation certificates, pins and awards. This program must be donated to a school.

Who Can Use These Programs?

Many groups and organizations can use the youth educational programs, including:

- Youth service clubs.
- Schools – public, private, parochial and homeschool associations.
- Churches – programs have been adapted for vacation Bible school.
- YMCA or YWCA.
- Park programs.
- Day care centers.
- Before- and after-school programs.
- Scout troops.
- 4-H clubs.
- Civic groups

How to Access Youth Educational Programs

Contact your local Modern Woodmen financial representative for a program catalog and order form.

Inviting Elected Officials

As a fraternal benefit society, Modern Woodmen is a tax-exempt organization that sells financial products and gives back to communities nationwide. Being tax-exempt allows Modern Woodmen to mobilize volunteers like you and provide funds to support community causes.

To help Modern Woodmen maintain our tax-exempt status, we need elected officials on the state and federal levels to understand our impact. This is why it's important for elected officials to experience firsthand how members help each other and the community. This means reaching out to legislators, inviting them to local Modern Woodmen events and telling them about the good you do in your community.

Reaching out to elected officials is one way to share the works done by Modern Woodmen members. When you speak with legislators, tell them about the good deeds members have done in your community and remind them that the fraternal tax exemption is essential to fraternal benefit societies like Modern Woodmen.

Below are a few simple steps to take when inviting your elected officials to a Modern Woodmen volunteer project.

1. Create a list of local elected officials –

Include state officials (state house or assembly members, state senators, etc.) and federal officials (U.S. House and Senate members). You may even add your mayor or other local officials. Include mailing addresses, emails and telephone numbers. For mailings to federally elected officials, use district office mailing addresses instead of the Washington D.C. office.

2. Prioritize events –

The more hands-on an event is, or the greater its impact on

the community, the more attractive it will be to elected officials. Service projects, Hometown Hero events or Matching Fund projects in which your members play a significant role are good opportunities to invite elected officials.

3. Send invitations –

Before you send your first invitation, make a courtesy call to the official's office to let the staff members know you will be extending invitations from time to time.

- Ask who in the office manages the schedule and how they prefer to receive an invitation. Note this information for future use. After the initial call, send the invitations this preferred way.
- Include the basics in the invitation (date, time, location and your contact information). Also try to include facts that will get the elected official's attention. This includes how many people will attend, and who or what the activity benefits, if you plan to invite the media, etc.

4. Follow up –

If you do not hear back, call to see if the official will attend. The staff may have questions about the event that you can answer at this time.

5. Send a thank-you note –

A timely and sincere note thanking an official for his or her attendance at an activity can seal a relationship. Include any photos you took or newspaper articles you clipped.

Most elected officials appreciate opportunities to join their constituents in efforts to help build a better community. So, an elected official's attendance at an activity is important recognition for the chapter or youth service club and its members.

Fraternal Talking Points

A Key Message

At Modern Woodmen, we sell life insurance, annuity and investment products not to benefit stockholders but to improve the quality of life of our stakeholders – our members, their families and their communities. How? Through social, charitable and volunteer activities. Each year we provide more than \$19 million and nearly half a million volunteer hours for local community projects.

What Makes Modern Woodmen Unique?

Modern Woodmen has more than 750,000 members in the United States. The individual actions of members make an important impact in communities nationwide. Examples of community programs and volunteer projects organized by chapters and youth service clubs include:

- Coordinating fundraising projects and matching the funds raised.
- Facilitating volunteer projects at the local level.
- Donating to food pantries, shelters and other local organizations serving those in need.
- Supporting local schools by donating free youth educational programs and coordinating local service projects and fundraisers.

Members of Modern Woodmen are joined by the common bonds of:

- Financial security for families.
- Quality family life.
- Community impact.

What Type of Organization Is Modern Woodmen?

As a fraternal benefit society, Modern Woodmen is a 501(c)8 tax-exempt organization that sells financial products and gives back to communities nationwide. Members are united by our common bonds and organized into chapters across the country. This provides members a way to connect with one another and give back to causes they believe in.

Why Is Modern Woodmen Tax Exempt?

Funding for the Modern Woodmen fraternal system and programs is assisted by tax exemptions given to fraternal benefit societies by the U.S. Congress and all 50 state legislatures.

Why Is It Important for Modern Woodmen to Keep Its Tax Exemption?

Modern Woodmen's tax exemption allows the organization to mobilize volunteers and provide funds to support community causes. Modern Woodmen is organized into nearly 2,800 chapters and over 800 youth service clubs nationwide, which provide a framework to communicate with and assemble fraternalists. Annually we provide more than \$19 million and nearly half a million volunteer hours for local community projects.

Liability Coverage

Modern Woodmen's corporate liability and property damage insurance covers groups in club- and chapter-sponsored events.

Modern Woodmen has liability insurance coverage designed to protect leaders and the organization in case of claims of negligence by members who may be injured during a club or chapter activity.

Our insurance is not an "accident policy." Its purpose is to protect a club or chapter in the event it is found liable for a negligent act that results in injury. In most instances, minor personal injuries that occur are not the result of negligence by the club or chapter.

If a member is injured at a club activity, he/she should file a claim with his/her personal medical insurer.

If an accident occurs on personal property, the homeowner's liability insurance will provide coverage.

If a member is injured in a public place, such as a restaurant or roller skating rink, the facility's liability insurance would cover the accident.

In most cases, when an accident happens, it is not the result of any negligence on the part of the club, chapter or its leaders. If a member makes an allegation of negligence, contact the Fraternal Department immediately. We will refer you to our legal advisors.

Fraternal Leader Job Description*

Overview

If you like to plan social activities or roll up your sleeves to help a neighbor or community organization, this opportunity is for you. Modern Woodmen of America is looking for individuals who enjoy helping others and bringing people together for social, educational and hands-on volunteer activities. As a fraternal leader of a chapter, Summit chapter or youth service club; you'll be the driving force behind planning, organizing and executing activities and events.

Impact

You'll make a positive impact on your community and Modern Woodmen members who live in your community. In 2016, our 3,500 chapters and youth clubs provided \$21.7 million and 562,388 member volunteer hours for fraternal activities and programs nationwide. Imagine what you and local Modern Woodmen members can accomplish in your community!

Responsibilities

- Plan, promote and lead the activities and community service projects for a chapter (members of all ages), Summit chapter (members age 55 and up) or youth service club (members under age 16).
- Engage local members in activities and events.
- Pay bills and account for all transactions.
- Develop a board of trustees (for chapters/Summit chapters). Enlist their help in planning and conducting activities.
- Be an ambassador for Modern Woodmen in your local community.
- Report on your activities to Modern Woodmen.

Time Commitment

Three to five hours per month, depending on the activity. The majority of our fraternal leaders work full time in addition to leading a chapter or club.

Qualifications

- Passion for helping others and your community.
- Understanding of your local community needs with a desire to make an impact.
- Love of bringing people together for fun and/or to benefit the greater good.
- Hands-on planning and organizational skills.
- Access to a computer and internet connection.

Support

Receive monetary support and tools from Modern Woodmen. Work with your local Modern Woodmen representative to make your chapter or club successful. Count on the operations team in Modern Woodmen's Fraternal Department to answer your questions and assist you.

Benefits

- Make an impact on your community and in causes you care about.
- Gain new friendships, experiences and skills.
- Be a part of a tradition of serving others since 1883.

* Modern Woodmen fraternal leaders are referred to as activities coordinators for chapters and Summit chapters and as youth club leaders for youth service clubs.

MAKE AN IMPACT!

Contact Us

Have questions? Visit **www.imakeanimpact.org** for more details and creative activity ideas.

You may contact the Fraternal Operations team:

- By email: fraternal@modern-woodmen.org
- By phone: (800) 322-9805