

Touching lives. Securing futures.®

Fraternal Leader Handbook 2024



**MAKE AN
IMPACT!**

For Activities
Coordinators
and Club Leaders



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HIGHLIGHTS

Please review this handbook in its entirety as there are multiple changes throughout the document. Below is a list of the key changes:

- Further explanation of an activities coordinator fiduciary responsibility to manage the chapter and chapter finances.
- Basic information about chapter bank accounts and where to learn more.
- An explanation of the different activity invitation options.
- A summary of all chapter and youth club policies and links to the policies, which are available on the [Training & Resources site](#).
- High-level steps for using Fraternal Connect, the electronic attendance tracking tool, and how to use it at large-scale events.
- Generally, we expect chapters and youth clubs to host in-person events. However, virtual and limited-contact events are still allowed when it is necessary or more appropriate.
- The drive-thru and to-go type meals temporarily approved for social, educational and Hometown Hero events are no longer allowed.

Note: Effective, Jan. 1, 2024, fraternal leaders will begin REPORTING attendance using Fraternal Connect. You can continue to use sign-in sheets to capture attendance, but attendance numbers will only be reported using Fraternal Connect.



Remember to **check your email** on a regular basis. Be sure to look for monthly fraternal leader update emails to stay informed on upcoming changes and learn about helpful resources.

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 2022, Modern Woodmen provided \$17.8 million and 280,000 member volunteer hours for fraternal activities and programs nationwide.

What Makes Modern Woodmen Unique?

Modern Woodmen has more than 700,000 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 by reviewing the Member Involvement policy in the Key Policies section.

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.

ACTIVITIES COORDINATOR SECTION (Chapter and Summit Chapter)



What is a Chapter?

Modern Woodmen of America is organized according to a nationwide lodge system of local chapters. Each local chapter is registered with the Internal Revenue Service and has its own tax ID number. Each chapter is a part of Modern Woodmen's group exemption with the Internal Revenue Service.

Chapter activities are a fraternal program offered to Modern Woodmen members. Chapters allow members to come together to enjoy social activities and participate in meaningful volunteer opportunities that benefit local communities.

There is no age restriction for "traditional" chapters. A Summit chapter is a special type of chapter comprised of members age 55 and older."

Purpose of a Chapter

Chapters encourage and support quality family life through fraternal activities and education for members. Chapters provide 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. Summit chapter members are beneficial and social members of Modern Woodmen who are 55 years of age or older. 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 programs.

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.

Understanding Chapters, Summit Chapters and Youth Service Clubs

Type	Description	Age Restriction
Chapter	Chapter activities in communities across the nation provide opportunities for members of all ages to volunteer, socialize and learn. Chapters also raise funds for local causes.	None
Summit Chapter	Summit chapters offer fun and fulfilling experiences to fit the busy lifestyles of members ages 55 plus.	Age 55 and older
Youth Service Club	Guided by adult member leaders, youth club activities emphasize volunteerism, patriotism, education and fun.	Up to age 16

Activities Coordinator Role

Each chapter is 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 chapter board. 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.
- Acknowledge and adhere to Modern Woodmen's Code of Conduct.
- Being an ambassador for Modern Woodmen in your local community.

By maintaining successful chapters, you are also helping to fulfill a promise we make to every member of Modern Woodmen and that is the promise to be invited to a chapter activity on a monthly basis.

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

Leadership Team

Establishing a chapter board is a vital part of having a well-run, effective and relevant chapter. Comprised of members, a chapter board works together to make an impact in their local

Order the board recruitment brochure in the Supplies area of imakeanimpact.org and check the [Training & Resources site](#) for resources on hosting board meetings.

community. Some even think of them as an impact team! This team offers members an opportunity to share ideas and help create memorable experiences.

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.

Chapter board members are a resource to you as an activities coordinator. They should be involved with decision making and overall leadership of the chapter. It is good practice for the activities coordinator to consult with the chapter board before making major decisions that impact the chapter, members and chapter funds.

*Positions required for a chapter board.

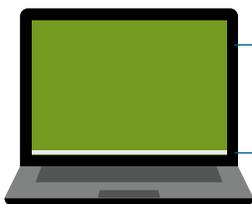
Board meetings provided a great opportunity for board members to interact on a regular basis and build community. Use the fillable Chapter Board Meeting Agenda, available on the Lead a Successful Chapter section of the Training and Resources Page, to help guide your discussion and take notes.

It is important to involve board members when:

- **Planning activities.** Board members can help with idea generation, planning, connecting with local organizations, and hosting activities.
- **Premier planning.** Involve the board in creating an action plan for achieving premier. (Use the premier planning worksheet on the [Training & Resources site](#).) The board should determine how premier funds are used.

- **Engaging members.** When attending events, board members should engage with other members. Board members can help increase event attendance by encouraging members to attend future activities.
- **Reviewing chapter finances.**
- **Making special or unusual purchases,** including chapter equipment.

One board meeting per year is required for a chapter to achieve premier status. The Fraternal Department will reimburse chapters \$7 per attendee up to the total cost of the meeting, and up to two times per year between Nov. 1 and Oct. 31.



Go to the Training & Resources page on imakeanimpact.org to access training modules on chapter boards.

Activities Coordinator Compensation

The activities coordinator will receive \$75 per activity for up to 12 activities per year. They will have the option of receiving payments monthly, quarterly, semiannually or annually. To pay yourself, write a check from the chapter bank account **only after** the leader compensation is deposited into the account.

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 & Resources page on imakeanimpact.org to access training module on leader compensation.

Requesting and Reporting Activities

Submitting a Request

- Submit a request for every activity by logging on to: www.imakeanimpact.org. All requests must be pre-approved by the Fraternal Department.

Note: Requests must be submitted seven (7) days prior to the activity date. If postcards are selected, submit the request 28 days in advance.

- Postcards are optional. (Postcards are not available for service projects.) E-invitations are required for all activities.
- Enter the necessary information on the request form and check for errors before submitting the form.
- Order supplies on the activity request form or using the Order Supplies form. Balances due for supply items will be deducted from the chapter bank account. Most supply items should not be included as expenses on the activity report.

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

Submitting a Report

- Log on to www.imakeanimpact.org.
 - Click on New Report in the left navigation bar and select the activity.

- Alternatively, 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 sign-in sheets, if used.

Hosting an activity with another chapter/club? Split the event expenses and attendance count for the event. The amount reported by each chapter/club should equal the total attendance and cost for the entire event.

Complete activity reports as soon as possible and no later than 30 days after the event. (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 & Resources page on imakeanimpact.org to access training modules on submitting requests and reports.

Invitations to Chapter Activities

E-invitations are required for all chapter activities. Members will receive the e-invitations upon approval of the activity request and based on the initial e-invitation date selected on the request form. E-invitations are automatically generated

by imakeanimpact.org and sent to members through voice calls, text messages, and/or email messages using a service called One Call Now.

Activities coordinators can select a specific age group to receive the e-invitations and whether a reminder is sent 10 days and/or 3 days in advance.

Have questions about e-invitations? Visit the [Training & Resources site](#) on *Make an Impact* to review the *E-invitation FAQs and best practices*.

Postcard invitations are available for all chapter activities except service projects, if the activity request is submitted at least 28 days prior to the event. Postcards are mailed to each member household within the mile radius selected on the activity request form. Activities Coordinators can request an RSVP via phone or email. A Modern Woodmen field representative's name may be added to the postcard invitation as an additional contact. Please review the postcard invitations best practices document available on the [Training & Resources site](#).

Note: The Fraternal Department will no longer send postcards directly to members at some point in 2024. Postcards will be available for activities coordinators to distribute, but the process has not been determined. Please keep an eye out for the monthly fraternal leader updated email, so that you are aware of any future changes.

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 right away but within 30 days of the activity date. More than two late reports could prevent the chapter/club from reaching premier status.

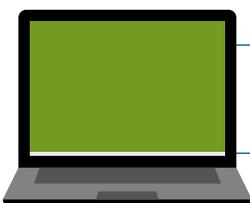
	Chapters	Summit Chapters
Educational event	1	1
Hometown Hero event	1	1
Matching Fund project	1	1
Service projects	3	1
Social activities / Community days	3	5
TOTAL	9	9

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

Premier funds are paid to the chapter. Use premier funds to supplement a future activity or host a special member celebratory event.



Go to the [Training & Resources page](#) on imakeanimpact.org to access training modules on the path to premier status.

CHAPTER FINANCES AND COMPENSATION



Activity Reimbursement

Generally, the activities coordinator will make purchases using the chapter bank account. Upon approval of the activity report, the Fraternal Department will electronically deposit the calculated reimbursement into the chapter bank account. (More details about chapter bank accounts is provided below and on the [Training & Resources site](#).) Below is a list of activity categories and the reimbursement levels for each.

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

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

Managing Chapter Finances

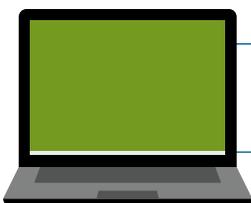
Fiduciary Responsibilities

As the chapter activities coordinator, you are responsible for managing the chapter's finances and records. The activities coordinator must account for all funds received and disbursed. The activities coordinator should share this information with the chapter board during board meetings throughout the year.

Receipts for purchases should be kept with the chapter records. Only receipts associated with chapter activities and used to support reimbursement from the Fraternal Department need to be uploaded to the activity report on imakeanimpact.org. (Keep these receipts until the activity report is approved.)

If chapter funds are used to purchase equipment, make donations to charities or other purchases not eligible for reimbursement by the Fraternal Department, the chapter board's approval must be obtained first and documented. Prior permission from the Fraternal Department is only required if the purchase is \$500 or more. Any equipment or assets owned by the chapter should be reported annually on the Chapter Equipment and Asset Report available in the forms area of the [Training & Resources site](#). For more guidance, review the Chapter Equipment and Assets Policy available on the [Training & Resources site](#).

The Fraternal Department has access to all chapter bank accounts and periodically conducts reviews of chapter transactions. It is very important to maintain documentation of all chapter transactions just in case they are requested.



Go to the Training & Resources page on imakeanimpact.org to access training module on chapter funding and finances..



Go to the Training & Resources page on imakeanimpact.org to access more information about managing chapter bank accounts.

Chapter Bank Accounts

The activities coordinator manages the chapter's bank account, which is held in the name of the chapter at Axos Bank. The activities coordinator is the signer on the checking account. You must be able to account for all transactions made with the chapter bank account.

The activities coordinator will receive a debit card and checks. Purchases should be made with the chapter debit card or checks, creating an electronic paper trail. Please avoid using electronic payment apps, such as Venmo, CashApp, etc. (For more details, visit the Key Policies area.) When necessary, the activities coordinator may purchase items with personal funds and then reimburse themselves once funds are available in the bank account. This is sometimes necessary when you are first assigned to a chapter, because it can take some time before you gain access to the chapter bank account.

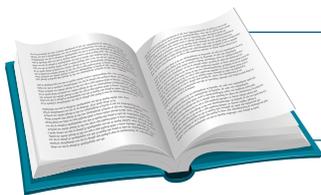
The account number is visible on the chapter dashboard on imakeanimpact.org. The dashboard displays the chapter's opening balance from the prior day. However, the best way to ensure you know the current balance is to access your account

through Axos Bank. We highly recommend you create an account using Axos Bank's online banking system or the bank's mobile app. Telephone banking is available as well. It's also a good practice to check your bank account regularly to guard against fraud. If you have questions about the chapter account, contact Axos Bank at CommercialBanking@axosbank.com or 866-747-4472. Email is the best option.

For a list of frequently asked questions, visit the [Training & Resources site](#).

Proper Use of Funds

Chapter funds are intended to be used for expenses necessary to host chapter activities. Chapter funds may not be used for business marketing purposes. They should not be used to purchase gifts for individual members. 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, thoroughly review the Activities Categories section and all policies provided in the Key Policies section and the [Training & Resources site](#).



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



YOUTH SERVICE CLUB LEADER SECTION



Purpose of a Youth Service Club

Youth club activities are a fraternal program offered to Modern Woodmen members. Youth 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 beneficial 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 programs.

Members may invite guests to attend youth 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 participate in youth club activities regularly. 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.
- Acknowledge and adhere to Modern Woodmen's Code of Conduct.

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

Understanding Chapters, Summit Chapters and Youth Service Clubs

Type	Description	Age Restriction
Chapter	Chapter activities in communities across the nation provide opportunities for members of all ages to volunteer, socialize and learn. Chapters also raise funds for local causes.	None
Summit Chapter	Summit chapters offer fun and fulfilling experiences to fit the busy lifestyles of members ages 55 plus.	Age 55 and older
Youth Service Club	Guided by adult member leaders, monthly youth club activities emphasize volunteerism, patriotism, education and fun.	Up to age 16

Finances and Compensation

Activity Reimbursement

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.

NEW! We recommend youth club leaders open a separate **personal** checking account to manage youth service club funds. This practice will allow leaders to maintain separation between personal funds and youth club funds. The account must be opened under the leader's name and social security number as a personal account not a business account. The youth club is not a separate entity and does not have its own tax ID number.



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 & Resources page on imakeanimpact.org to access training modules on youth club funding and finances, and leader compensation.

Requesting and Reporting Activities

Submitting a Request

- Submit a request for every activity by logging on to: www.imakeanimpact.org. All requests must be pre-approved by the Fraternal Department.
- Requests must be submitted seven days prior to the activity date.
- Postcards are available for Matching Fund projects. If selected, the request must be submitted at least 28 days in advance.
- E-vites are optional for youth club activities.
- Enter the necessary information on the request form and check for errors before submitting the form.
- Order supplies on the activity request form or using the Order Supplies form. The cost for supplies will be considered advances and reduced from the reimbursement amount when the report is approved.

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

Submitting a Report

- Log on to www.imakeanimpact.org.
 - Click on New Report in the left navigation bar and select the activity.
 - Alternatively, 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 sign-in sheets, if used.

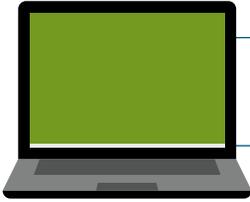
- If fee-based supply items were ordered for the activity, include the amount in the total cost of the event. Attach a screen shot of the supply order.

Hosting an activity with another chapter/club? Split the event expenses and attendance accordingly. The amount reported by each chapter/club should equal the total cost or attendance count for the event.

Complete activity reports as soon as possible and no later than 30 days after the event. (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 & Resources page on [imakeanimpact.org](https://www.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 right away but within 30 days of the activity date. More than two late reports could prevent the chapter/club from reaching premier status.

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.

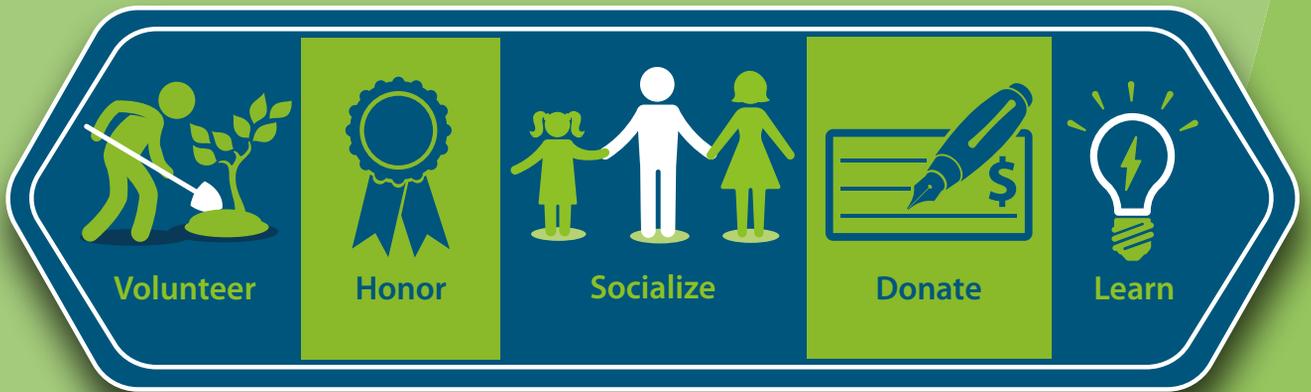
The leader and members should choose how these funds will be used by the club.

Premier funds are paid to the youth club. Use premier funds to supplement a future activity or host a special member celebratory event.



Go to the Training & Resources page on [imakeanimpact.org](https://www.imakeanimpact.org) to access training modules on the path to premier status.

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

Requests must be submitted at least seven (7) days prior to the event for pre-approval. Postcards are optional for chapters. E-vites are required for chapters. If postcards are needed, submit the request 28 days in advance. Educational events must include an educational component.

Note: The postcard invitation process will change in 2024. Please read your monthly fraternal leader update emails and monitor the fraternal leader closed Facebook group for future details.

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.

We expect most educational event funds to be used for materials and supplies directly related to hosting the event. A maximum of \$75 may be used to purchase door prizes.

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. Cash donations are not allowed. Read the Gift Cards and Fraternal Activities Policy in the Key Policies section.

Go to the Training & Resources area on imakeanimpact.org for event ideas and a training module on educational events.



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. See the Member Involvement policy in the Key Policies area for more information and tips.



Track attendance with Fraternal Connect, Modern Woodmen's first mobile app for fraternal leaders. Learn more in the Additional Resources section.

PREMIER STATUS REQUIRES ONE EDUCATIONAL EVENT PER YEAR.

HOMETOWN HERO

Maximum per year: One

Funding

- Chapters and Summit chapters: up to \$100 for 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. 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

Requests must be submitted at least seven (7) days prior to the event for pre-approval. Postcards are optional for chapters. E-vites are required for chapters. If postcards are needed, submit the request 28 days in advance. 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.

Note: The postcard invitation process will change in 2024. Please read your monthly fraternal leader update emails and monitor

the fraternal leader closed Facebook group for future details.

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. You can honor people of all ages and even animals.

Step 2: 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.) Invite the honoree's friends and family, in addition to members. The Fraternal Department offers an optional certificate and folder to present to the Hometown Hero.

Step 3: Hold the ceremony. Present the Hometown Hero certificate (optional) to the honoree. Track attendance with Fraternal Connect. Save your receipts.

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

Use of Funds

Hometown Hero funds may be used to cover the cost of the event expenses, such as refreshments, decorations or other supplies needed to host the event.



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.

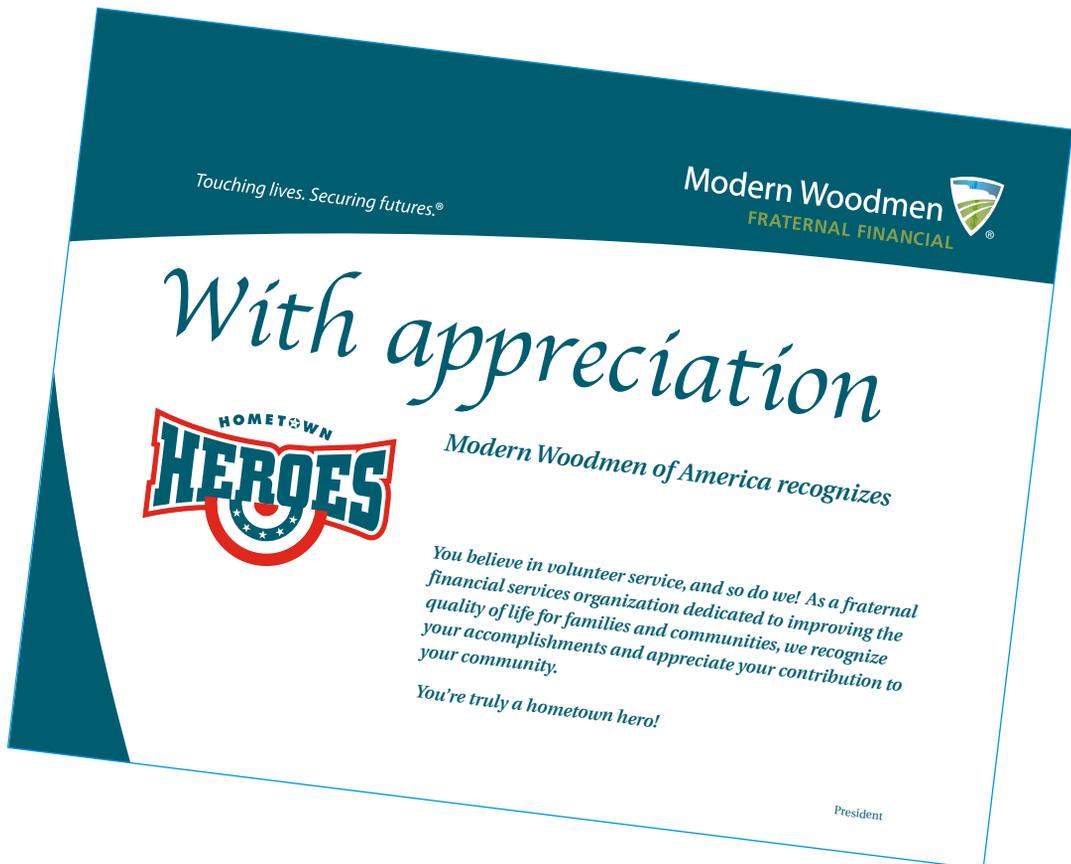
Create Awareness

Maximize community impact by getting members involved. See the Member Involvement policy in the Key Policies area for more information and tips.



Track attendance with Fraternal Connect, Modern Woodmen's first mobile app for fraternal leaders. Learn more in the Additional Resources section.

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.

Go to the Training & Resources area on imakeanimpact.org for event ideas and a training module on Matching Fund projects.

Guidelines

Requests must be submitted at least seven (7) days prior to the event for pre-approval. Postcards are optional for chapters and youth clubs. E-vites are required for chapters. If postcards are needed, submit the request 28 days in advance. Indicate whether flyers are needed on the request form.

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 in the Key Policies section.

Note: The postcard invitation process will change in 2024. Please read your monthly fraternal leader update emails and monitor the fraternal leader closed Facebook group for future details.

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 & Resources 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.
- Track attendance electronically using Fraternal Connect. (For more information about Fraternal Connect, visit the Additional Resources section.)
- Once the required documentation 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.

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.

The Match

Modern Woodmen matches the net amount raised up to \$500 (youth clubs) or \$2,500 (chapters and Summit chapters).



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. See the Member Involvement policy in the Key Policies area for more information and tips.



Track attendance with Fraternal Connect, Modern Woodmen's first mobile app for fraternal leaders. Learn more in the Additional Resources section.

PREMIER STATUS REQUIRES ONE MATCHING FUND EVENT PER YEAR.



SERVICE PROJECTS

Maximum per Year: Unlimited

Funding

- Chapters: Up to \$1,000 per year.
- Summit Chapters: Up to \$200 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.

Go to the Training & Resources area on imakeanimpact.org for event ideas and a training module on service projects.

Guidelines

Submit service project activity requests at least seven (7) days prior to the activity. Projects must be pre-approved. E-vites are required for chapters. 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 benefitting 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. Track attendance using Fraternal Connect. Retain receipts for any expenses.
- Submit an activity report. Attach receipts.
- Once the report is approved, the final cost (expenses) of the project will be deducted from the available pool of funds. See the illustration for an example.

Use of Funds

We do not determine the amount of funding needed for the project. You tell us. Funds should be used to purchase the materials and supplies necessary to complete the project. You may set aside a small amount to cover the cost of water, coffee or light snacks (i.e. granola bars) for volunteers.

Typically, funds may not be used for meals, alcohol, firearms, door prizes, gift cards or unrelated expenses. Cash donations are not allowed. Youth clubs only may use service project funds for low-cost meals. For additional guidance, thoroughly review the policies provided in the Key Policies section of this handbook.

If you are uncertain about how to use service project funds, 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

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Create Awareness

Maximize community impact by getting members involved. See the Member Involvement policy in the Key Policies area for more information and tips.



Track attendance with Fraternal Connect, Modern Woodmen's first mobile app for fraternal leaders. Learn more in the Additional Resources section.

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

Requests must be submitted at least seven (7) days prior to the event for pre-approval. Postcards are optional for chapters. E-vites are required for chapters. If postcards are needed, submit the request 28 days in advance. Additionally, each social activity must follow these basic guidelines:

- 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.

Note: The postcard invitation process will change in 2024. Please read your monthly fraternal leader update emails and monitor

the fraternal leader closed Facebook group for future details.

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 activity ideas and past issues of Impact magazine in the Training & Resources 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. See the Member Involvement policy in the Key Policies area for more information and tips.



Track attendance with Fraternal Connect, Modern Woodmen's first mobile app for fraternal leaders. Learn more in the Additional Resources section.

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

Requests must be submitted at least seven (7) days prior to the event for pre-approval. Postcards are optional for chapters. E-vites are required for chapters. If postcards are needed, submit the request 28 days in advance. Additionally, each activity must follow these basic guidelines:

- Include a service component such as donation of a canned good. *Due to COVID-19, the service component remains optional.*

- 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 activity ideas and past issues of Impact magazine in the Training & Resources 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. See the Member Involvement policy in the Key Policies area for more information and tips.



Track attendance with Fraternal Connect, Modern Woodmen's first mobile app for fraternal leaders. Learn more in the Additional Resources section.

PREMIER STATUS REQUIREMENTS: 5 (SUMMIT CHAPTERS ONLY).

KEY POLICIES

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SUMMARIES OF KEY POLICIES

Below is a list of policies for chapters, youth service clubs and fraternal activities. You can find the full policies on the [Training & Resources site](#).

Alcohol Consumption at Chapter Functions

Policy – 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. *(Included in this section.)*

Equipment and Asset Policy – 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 Policy – The recipient eligibility policy applies to both service and Matching Fund project recipients. It describes both eligible and ineligible recipient categories. *(Included in this section.)*

Fraternal Ritual – We encourage chapters and youth clubs to use this Modern Woodmen of America ritual during social, educational and charitable events. *(Included in this section.)*

Fraternal Digital Media Policy – This policy explains which social media can be used 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 that may be spent on gift cards. *(Included in this section.)*

Governance and usage of artificial intelligence at Modern Woodmen

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

Joint Activities Policy – Chapters and youth service clubs may come together to co-host fraternal activities throughout the year. Generally, a majority of the chapter or youth club activities should be held independently of other chapters/youth clubs. Review the policy for more details.

Media Response Policy – 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 the media contacts at Modern Woodmen's home office.

Member Involvement – Chapters and youth clubs are comprised of Modern Woodmen members. The funds provided to chapters and youth clubs are intended to support activities that bring members together for a shared purpose. This policy defines member involvement, which is one of the main guidelines for hosting activities.

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 Axos Bank website and mobile app may 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.

FRATERNAL RITUAL

Rev. Nov. 17, 2021

We encourage chapters and youth clubs to use the Modern Woodmen of America Ritual during social, educational and charitable events.

Welcome

"Welcome to this Modern Woodmen member (event, dinner, etc.) hosted by (Chapter XXX in Town or Town chapter).

Unifying Activity

[Unite members in the moment by saying the Pledge of Allegiance, singing the National Anthem or reciting the last two lines of the Modern Woodmen Creed. Choose one or more of these three options for the event.]

A. Pledge of Allegiance

Prior to the meeting, determine if there is a United States flag at the venue. You may need to bring a flag or project a flag on a screen/wall. At the meeting, ask the group to rise and say the Pledge of Allegiance.

B. National Anthem

Prior to the meeting, determine if there is a United States flag at the venue. You may need to bring a flag or project a flag on a screen/wall. If there is a flag or flag image in the venue, invite members to stand and face the flag. Bring a recording of the National Anthem to play at the event.

C. Modern Woodmen Creed

Prior to the meeting, determine how you will share the last two lines of the creed with members so they can stand and recite it together. You could order Modern Woodmen Creed cards (F-1206) in the supplies section of imakeanimpact.org and hand them out. Another option is to project the Modern Woodmen creed on a screen/wall.

"Let's begin our event by [saying the Pledge of Allegiance/singing the National Anthem/reciting the last two lines of the Modern Woodmen Creed]."

The last two lines of the Modern Woodmen creed are:

All that we send into the lives of others;
Comes back into our own."

Icebreaker Activity

[Conduct ice breaker activities to encourage attendees to get to know each other. Use online resources to find ideas for groups of all sizes.]

Simple icebreaker activities:

- Ask: "Is anyone a new member of Modern Woodmen? [Recognize individuals who raise their hands] Welcome to the Modern Woodmen family."
- Ask: "Is anyone joining us for the first time? [Recognize individuals who raise their hands] Thank you for coming. We're glad you're here."
- Ask: "Is anyone here celebrating a birthday or anniversary this month?" [Ask the individuals to stand up.]

Announcements

1. Tell attendees when and where the next activity(ies) will take place.
2. Update attendees on recently held or upcoming service projects or Matching Fund events.
3. Share news from the Fraternal Department (e.g., new member program available)
4. Provide housekeeping information for the event (where restrooms are located, the time the meal will be served, etc.)
5. Introduce guests.
 - a. Use the Fraternal Connect attendance tool to identify:
 - I. Modern Woodmen members from other chapters who are in attendance.
 - II. Guests of members at the event.
6. Introduce the guest speaker if you're having one at your event.

Proceed with Main Event

Modern Woodmen of America Ritual for chapter board meetings

Welcome and Introductions

1. Welcome and introduce new attendees.
2. Recognize successes the chapter has accomplished since the last meeting.
3. Discuss the agenda for the meeting.

Review

1. Share details from the chapter's financial accounts.
 - a. Funds that have been used since the last meeting.
 - b. Funds that are available and how to use them for members' best interest.
2. Discuss what went well and what could have gone better at past events and activities.
3. Discuss activity suggestions from members that have been brought to the board's attention.

Planning

1. Brainstorm ideas for events that will create an experience for members.
2. Plan and schedule future events.
3. Divide tasks between board members for each event.
4. Set goals you would like your chapter to accomplish by the next meeting.

Closing Remarks

1. Discuss any topics that have not been addressed yet.
2. Address questions about anything that was discussed during the meeting or in general.
3. Review upcoming events that were decided on.
4. Thank everyone who attended for their time.

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 program. 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 & Resources 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. Plan activities your members will enjoy.** Use the roster resources available in the Engage Members area of the [Training & Resources site](#) to get to know your members.
- 2. Communicate with members.** Take advantage of existing and future communication tools, including fillable postcards, closed Facebook groups and new member welcome resources.
- 3. Gather input.** Use the member interest survey to ask for event ideas, project recipient suggestions and event feedback.
- 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](#).

FRATERNAL RECIPIENT ELIGIBILITY POLICY

Effective September 1, 2018

Revised October 1, 2021

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, should 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

- Local nonprofit organizations addressing specific community needs. Generally, the organization should have a 501(c)(3) or similar designation from the Internal Revenue Service and provide programs for the public good. Leaders could be required to provide the organization's tax ID for verification purposes.
- Local 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.

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.

GIFT CARDS FOR FRATERNAL ACTIVITIES

Purpose: To provide fraternal leaders with guidance on appropriate use of funds as it relates to gift card purchases.

Fraternal activity funds and chapter bank account funds can be used to purchase gift cards in specific instances, which are described below. Purchasing gift cards for any other purpose is not allowed.

Virtual events (Educational, Hometown Hero or social)

Generally, chapters and youth clubs should host in-person activities. However, virtual and limited-contact events are still allowed. There could be specific circumstances that warrant hosting an activity virtually or with limited-contact due to a community crisis or the type of project (e.g. supply/food drive).

If a chapter or youth club is hosting a virtual event, the chapter or youth club can provide members with gift cards to use toward snacks, meals, event materials or other items related to the virtual event. The amount of the gift card should be equivalent to the amount the chapter or youth club would have paid toward the member's or member household's purchase if the event were held in person. For example, if the chapter usually pays \$5 toward the attendee's purchase, it can provide attendees with a \$5 gift card. The gift card should be used on the date of the event.

Drive-thru meals (Educational, Hometown Hero and Social/Community Days)

The drive-thru and to-go type meals temporarily approved for social, educational and Hometown Hero events are no longer allowed.

Service projects

Generally, service project funds should not be used to purchase gift cards.

There is one exception: Chapters and youth clubs can purchase gift cards in small denominations to be included in care packages, hygiene kits, goodie bags/baskets, etc. to donate to people in need. The gift card amount may not exceed \$10 per person. The chapter/youth club is allowed to use a maximum of \$100 in service project funds toward gift cards during a year. A Summit chapter is allowed to use up to \$50 per year.

Service project funds may not be used to purchase gift cards for "pay it forward" or "acts of kindness" projects where members randomly perform acts of kindness in the community. The projects should encourage hands-on service activities performed by members.

Door prizes

Gift cards may be purchased as door prizes for social and educational activities. The total amount spent on door prize gift cards cannot exceed \$75 for an educational event. There is no maximum door prize amount for social activities.

Contact the Fraternal Department at fraternal@modern-woodmen.org or 800-322-9805 for questions about specific situations.

ADDITIONAL RESOURCES

**MAKE AN
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MAKE AN IMPACT WEBSITE

The screenshot shows the 'Activity Management' dashboard for Chapter 26, Rock Island, IL. The user is logged in as Kristen Roberts. The dashboard features a navigation menu on the left with options like 'Dashboard', '26 Rock Island, IL', 'Activity Request', 'New Report', 'Training Materials', 'Order Supplies', 'New Board Report', and 'Compensation'. The main content area displays a warning about overdue activity reports, an 'ACHIEVEMENT STATUS PROGRESS' section with a 100% progress bar, and a table of activity reports.

Activity Category	Title	Status	Event Date	Location
Matching Fund	Trivia Night MidCoast Fine Arts	Report Approved	9/27/2019	Holiday Inn Rock Island
Service Project	Homeless Meal St. Joe's Meal Site	Report Approved	9/11/2019	St. Joe's Meal site
Social Activity	Golf Outing	Report Approved	8/9/2019	Hidden Hills golf course

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.
2. Draft, edit and submit activity reports and associated documentation such as receipts, and photos.
3. Navigate among chapters, Summit chapters and youth service clubs if you are the leader for more than one.
4. View the chapter roster.
5. View the number of members in your chapter or club and average attendance.
6. Track progress toward premier status.
7. Access Fraternal Connect, the electronic attendance tracking tool.
8. View available educational event, service project and matching funds.
9. Order supplies. (View a list of available year-round supplies on the [Training & Resources site.](#))
10. Access reports showing your chapter or youth club's activities, reimbursements and attendance in the Reporting area.

STAY CONNECTED ...

DID YOU KNOW the Fraternal Department shares news and information in many ways almost weekly? Stay connected by doing these six things:

1. Keep your **EMAIL** updated within [imakeanimpact.org](https://www.imakeanimpact.org).

We use email to send approval activity confirmations; request additional information about chapter and youth club activities; and share time-sensitive or critical announcement. It's important that we have your correct email address, to keep you informed as quickly as possible. Please log on to [imakeanimpact.org](https://www.imakeanimpact.org) now to ensure your contact information is up to date. If it's not, just click on your name in the upper right corner. Select Account and then update your information, as necessary.

2. Read the **FRATERNAL LEADER UPDATE EMAIL** sent monthly.

These monthly emails are designed for you. They contain important news, information, and reminders about managing your chapter or youth club. Don't see it? Check your junk or spam folder.

3. Join the **FRATERNAL LEADER CLOSED FACEBOOK GROUP**.

Collaborate and share ideas with other fraternal leaders throughout the country. Keep up to date on news, announcements, and new training for leaders. Ask general questions related to managing a chapter or youth club. When logged into Facebook, search for "Modern Woodmen Fraternal Leaders" in Groups or go straight to the group [page](#).

4. Look for **IMPACT MAGAZINE** in your mailbox every quarter.

Ideas, ideas, and more ideas. Each issue includes activity ideas from across the country. We include need-to-know news, FAQs, helpful tools, and motivation. Find past issues of Impact magazine and other activity ideas on the Activity Ideas page on the [Training & Resources site](#).

5. Take a moment to view the **ANNOUNCEMENTS AREA** on the log-in screen.

When viewing the log-in screen (with the sunflowers) of [imakeanimpact.org](https://www.imakeanimpact.org), pause for a few minutes to see what announcements appear just above the log-in options. We share time-sensitive information, link to helpful resources on the [Training & Resources site](#) and highlight recent communications.

6. Contact our **SERVICE AND PROGRAMS TEAM**.

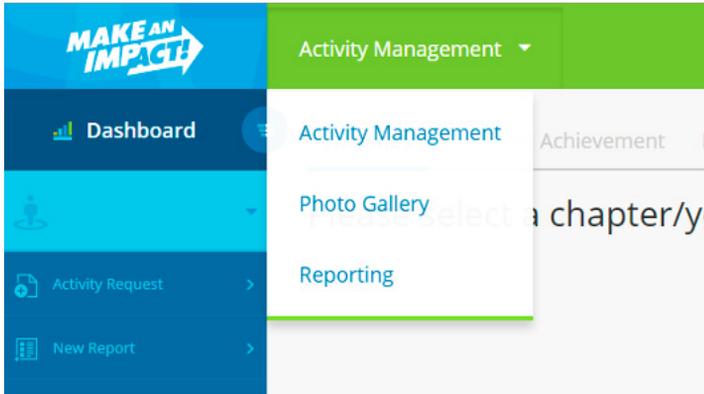
We're here to help you! If you have questions, contact us at fraternal@modern-woodmen.org or 800-322-9805 Monday-Friday, 8:00 a.m. – 4:30 p.m. CT.



MAKE AN IMPACT REPORTS

How to access the reports

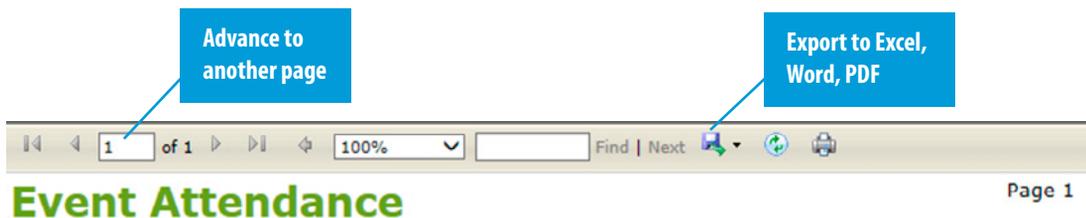
1. Log into imakeanimpact.org.
2. Select "Reporting" from the dropdown at the top.



3. Select from the list of reports. (See the next page for a summary of each report.)



4. Select the desired filters for your report. The filters are defaulted to include all chapters, Summit chapters and youth service clubs. Your region(s) should be selected by default. You can narrow down the selection further using the date, district and other custom options in the report.
5. Click "Run Report."
6. You may view the report in the browser, or export it to Excel, Word, PDF, etc.



MAKE AN IMPACT REPORTS (CONT.)

Summary of available reports

Many, but not all, reports include the chapter/club number, chapter/club type, leader name, city, state, county, region, territory, controlling region (if applicable) and district.

Event Count

Description: Displays the number of pending and completed activities by activity category and chapter/youth club number within a specified date range.

Filters: Date range (activity date); chapter/youth club number, chapter/club type, district, region, activity category or pending/completed status.

Accessible by: RDs, AAs and MPs

Event Attendance

Description: Displays the total members, guests and average attendance at activities by chapter/club number and activity category, based on activities that have been reported.

Filters: Start/end date (date of activity); chapter/youth club number, chapter/club type, district or region.

Accessible by: RDs, AAs, MPs, membership coordinators (reps only), sponsoring agents and fraternal leaders

Fraternal Reimbursement

Description: Shows the reimbursements that were provided to chapters/youth clubs by activity category within a given timeframe. Also includes a separate chart of leader compensation paid during that time.

Filters: Start/end dates (payment date); chapter/youth club number, chapter/club type, district and region. Choose whether to include the amount raised for Matching Fund events.

Accessible by: RDs, AAs, MPs, membership coordinators (reps only), sponsoring agents and fraternal leaders

Service Hours

Description: Displays the number of service hours reported by activity category and chapter/youth club number.

Filter by: Start/end date (activity date); chapter/club number, chapter/club type, district and region.

Accessible by: RDs, AAs, MPs, membership coordinators (reps only), sponsoring agents and fraternal leaders

Fraternal Impact Report

Description: Displays the chapter, Summit chapter and youth club reimbursements for each region.

Filter by: Date range and whether to include Matching Fund amount raised.

Accessible by: RDs, AAs, MPs and fraternal leaders

Activities

Description: Shows past and future activities that have been approved, including activity titles, dates, times and locations.

Filter by: Date range (activity date), activity category, chapter/youth club number, chapter/club type, district or region.

Accessible by: RDs, AAs, MPs, membership coordinators (reps only), sponsoring agents and fraternal leaders

Premier Status Reporting

Description: Displays how each chapter/youth club in the region is progressing toward premier status. Includes a count of completed and pending activities (within the rating period) by activity category and late reports.

Filter by: Year, district, region, sponsoring agent or premier status (yes/no)

Accessible by: RDs, AAs, and MPs

Chapter/Club Location

Description: Provides location details about the chapters and clubs in a region. Also includes a count of total members, adult members and youth members.

Filters by: Chapter/youth club type, district, region or active/inactive status.

Accessible by: RDs, AAs and MPs

Chapter/Club Leadership

Description: Provides contact details for fraternal leaders and chapter board members.

Filters by: Chapter/youth club type, district, region or active/inactive status.

Accessible by: RDs, AAs and MPs

Chapter/Club Management

Description: Lists all chapter/club requests (new chapter/club, leadership change, consolidation, location change) approved within the system.

Filter by: Change type, date range (request approval date), district, sponsoring agent, region or chapter/club type.

Accessible by: RDs and AAs

Fraternal Activity Recipients

Description: Lists the Matching Fund, Service Project and Hometown hero recipients.

Filter by: Start/end date (activity date), chapter/club number, chapter/club type, district, region, sponsoring agent number or activity category.

Accessible by: RDs, AAs and MPs

Fraternal Aid Provided Report

Description: Provides a list of all fraternal aid recipients within a region. Includes information such as the premium amount, mode, fraternal aid reason and approval date.

Filter by: Start/end date (approval date); region, servicing agent number, managing partner number, reason for aid and new/extension.

Accessible by: RDs, AAs and MPs

Youth Service Club Rosters

Description: Obtain a list of the junior members in your area to invite to upcoming activities. Junior members can be searched by a particular chapter or by zip code.

Filter by: Chapter or zip code

Accessible by: RDs, AAs, MPs and fraternal leaders

Attendance App Report

Description: Provides a list of event attendees captured through the electronic attendance tracking tool.

Filter by: Date, chapter/club, member name and district.

Accessible by: RDs, AAs, MPs, membership coordinators (reps only), sponsoring agents and fraternal leaders

TRAINING & RESOURCES SITE

The Training & Resources site at imakeanimpact.org has training and resources to help you become more confident as a fraternal leader. The site is organized by chapters, Summit chapters and youth service clubs that have sections dedicated to:

- Training modules & quizzes.
- Materials & resources.
- Discussion points & scripts.

The training modules and quizzes are a fun and interactive way that can help you:

- Learn the basics.
- Gain more in-depth training on the fraternal leader role.
- Be reminded of important things to know after you understand the basics.
- Test your knowledge and boost your confidence.

The materials and resources on the site will help you:

- Lead a successful chapter/club.
- Engage members.
- Impact your local community.
- Find forms and policies.

The discussion points and scripts available will help you introduce Modern Woodmen, explain your role, introduce guest speakers, greet a guest, and keep members up to date about activities.

If you can't find what you're looking for or have questions, reach out to the Fraternal Department at (800)322-9805 or fraternal@modern-woodmen.org.

Make An Impact Search this site

2023 National Campaign
2022 National Campaign
Fraternal Connect
Chapters
Summit Chapters
Youth Service Clubs
Impact Magazine
Project Guides
Facebook
Site Contents

Youth Service Club

In this section you will find resources on how to run a successful youth service club.

Training Modules & Quizzes

Follow along with the learning path that will help guide you to running a successful youth service club.

Resources & Materials

Templates and documents that can help you engage members and run a successful youth service club.

Discussion Points & Scripts

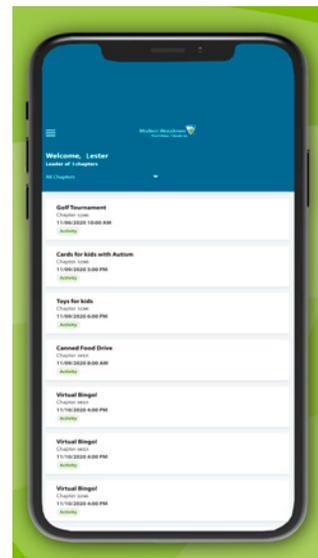
View discussion points and scripts to use when talking about Modern Woodmen, club activities, and more.

FRATERNAL CONNECT

Fraternal Connect is a mobile application available on the Apple App and Google Play store and is designed specifically for fraternal leaders to take attendance. It is also available as a web browser version through imakeanimpact.org. Fraternal Connect is the required way for leaders to REPORT attendance to allow for more accurate reporting of attendees. A user guide, which includes installation instructions, and training modules are available on the [Training & Resources site](#).

Here are some of the many benefits of using Fraternal Connect:

- Is accessible through a convenient mobile app on a phone, tablet or other device, or by using the web version on imakeanimpact.org.
- Makes tracking attendance easy and straightforward.
- Offers increased knowledge of your attendees/ members. Filter your roster and know which attendees are guests vs. members and how many times guests have attended.
- Leads to more accurate tracking of attendees.
- Automatically adds attendance counts to the activity report.



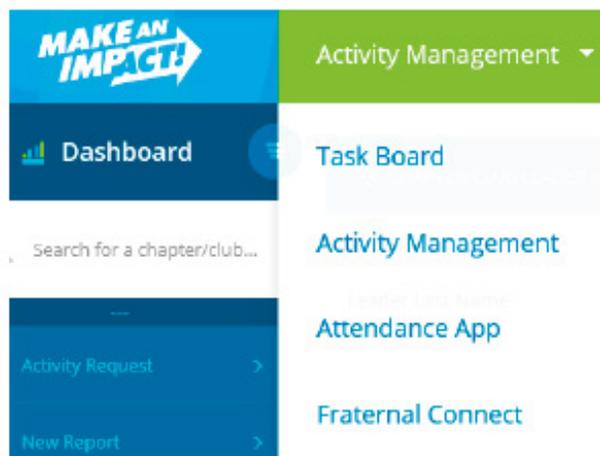
To access Fraternal Connect

On your browser:

1. Go to imakeanimpact.org and select Fraternal Connect from the drop-down menu.
2. Follow the prompts to log in for the first time. (see the web version instructions on the [Training and Resources site](#) for further instructions).

On the app:

1. Search for Fraternal Connect on the Apple App or Google Play stores to install the mobile application.
2. Follow the prompts to install and log in for the first time. (see the App Instructions on the [Training and Resources site](#) for further instructions).



Search Fraternal Connect on the Apple App or Google Play stores to install the mobile application (see the User Guide on the [Training & Resources site](#) for further instructions).



FRATERNAL CONNECT (CONT.)

Taking attendance at fraternal activities is easy!

1. Log into Fraternal Connect.
2. Select your upcoming activity.
3. Check in member attendees.
 - a. Check in guests and additional household members who come with them.
4. Check in other member attendees.
5. Complete the check in.

See the User Guide on the [Training and Resources site](#) for details.

To submit attendance.

1. Use Fraternal Connect to capture attendance information.
2. The attendance list is automatically uploaded to the Make An Impact report with the number of attendees automatically listed and the list attached within the report.

To track attendance at large events.

There are several ways to make tracking attendance at larger fraternal activities easier. See the next two pages for more information.

Check out the Fraternal Connect sections on the [Training and Resources Site](#)!

There you will find helpful resources such as the Fraternal Connect User Guide which includes sign in and how to instructions, FAQs, and more as well as training modules and practice courses!

TRACKING ATTENDANCE

General Attendance Tracking

Tracking attendance or participation in fraternal activities is a requirement for all chapter, Summit chapter and youth service club activities.

Using Fraternal Connect, the mobile application designed specifically for tracking attendance, is required to ensure tracking of individual member attendance. (Please see the Fraternal Connect section for more information.)

Physical sign-in sheets may be used during the event, particularly if you don't have an Internet or data connection, you're hosting a large event, or you don't feel comfortable using Fraternal Connect live. However, the attendee information must be transferred to Fraternal Connect later.

Generally, every attendee should sign or check in on their own. This provides attendees the opportunity to review and accept the photo release policy and update their information. Each attendee should sign in and be counted one time.

For joint chapter/youth club activities, count each attendee, including you and your family members, under one chapter/club only. This ensures counts will not be duplicated across partnering chapters/clubs.

Large Matching Fund and Large-Scale Public Events

We recognize that the nature of Matching Fund events and large-scale, public events can make tracking attendance a challenge. Therefore, we've developed some examples of how your chapter or your club might approach documenting participation.

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

- Sign in each attendee using Fraternal Connect. All attendees – members and guests can be signed in for the most accurate tracking and reporting. It provides contact information about members and guests and includes the photo release policy. A photo release 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.)
- Have everyone attending the event – members and guests – sign in on the Modern Woodmen attendance sheet. This method also includes the photo release policy needed to use attendee photographs. Transfer the information from the physical sign in sheet to Fraternal Connect after the activity takes place.
- Take attendance for members only at the Matching Funds event.
- Use other documentation like a spreadsheet of the chapter roster or simple list to track the members attending the Matching Fund event. You do not have to use the attendance sheets supplied by the Fraternal Department.
- Capture the members who volunteered at the Matching Fund event.
- Capture the members whom you know attended the event.

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

Sign in each attendee using Fraternal Connect. All attendees – members and guests – can be signed in for the most accurate tracking and reporting. It provides contact information about members and guests and includes the photo release policy. A photo release 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.)

Have everyone attending the event sign in on the Modern Woodmen attendance sheet. This method also includes the photo release policy needed to use attendee photographs. Transfer the information from the physical sign-in sheet to Fraternal Connect after the activity takes place.

Ask members to RSVP prior to the event and keep a list of members who are coming. Add them to Fraternal Connect before the event. Remove them from the attendee list, if they do not show up.

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.

3. Take attendance at contactless activities using one of these methods.

Ask members to RSVP prior to the event and keep a list of members who are coming using the physical sign-in sheet or other spreadsheet or list. You do not have to use the attendance sheets supplied by the Fraternal Department. Transfer this information to Fraternal Connect.

Sign in each attendee using Fraternal Connect. All attendees – members and guests – can be signed in for the most accurate tracking and reporting. If pictures are taken during the event, all members must have read and agreed to the photo release policy. If members are not asked to read and confirm the photo release, mark “no” for the consent and do not take photos.

4. Selling discounted tickets for a large public event.

We understand that reporting accurate attendance using Fraternal Connect will work differently when selling tickets for a large public event. Often times the chapter member can order a certain number of discounted tickets on behalf of family and friends. Use a spreadsheet or other list to track which members purchase tickets and how many tickets are purchased. Add the members to Fraternal Connect. Contact the Fraternal Department via email for further instruction.

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 2022, Modern Woodmen provided \$17.8 million and 280,000 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.

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.

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.

INVITING ELECTED OFFICIALS (cont.)

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 \$17.8 million and 280,000 volunteer hours for local community projects.

What Makes Modern Woodmen Unique?

Modern Woodmen has more than 720,000 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 2,500 chapters and over 500 youth service clubs nationwide, which provide a framework to communicate with and assemble fraternalists. Annually we provide more than \$17.8 million and 280,000 volunteer hours for local community projects.

MEMBER PROGRAMS

Spread the word about member programs!

Modern Woodmen offers a variety of fraternal programs and member programs to help improve the lives of members of all ages. Unfortunately, many members don't realize all the programs available to them. Here's how you can help members learn about available programs.

- Encourage members to create an account on the member website at member.modern-woodmen.org. Now available as a mobile app! Search for "Modern Woodmen" in your favorite mobile app store.
- Partner with a Modern Woodmen financial representative to deliver the fraternal programs presentation at an educational event. The presentation is available on Training & Resources page of imakeanimpact.org to financial representatives on The Resource Center.
- Refer members who experience a life event to a local Modern Woodmen representative.

Member Programs

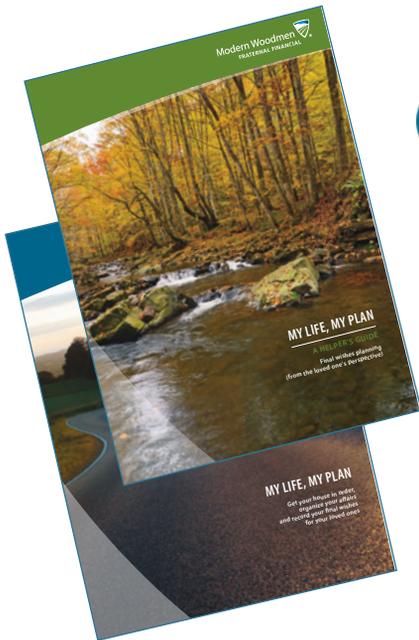
- Birthday Book Club
- Chapters
- Do-Good Grant®
- Final Wishes Resources
- Fraternal Aid Fund
- Make An Impact® Scholarships
- Modern Woodmen Travels
- National Parks Pass
- Newborn Program
- Orphan Program
- PerkSpot
- Summit Chapters
- Terminal Illness Interest Relief
- What's in the Box?SM
- Youth Service Clubs

Community support

- MoneyMasters K-12 Financial Literacy Program
- MoneyMasters Workshops for Adults

Subject to change, fraternal programs are not part of the insurance contract and may have specific eligibility requirements.

Visit the member website at member.modern-woodmen.org.



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

FRATERNAL LEADER HANDBOOK ACKNOWLEDGMENT FORM

PROGRAM YEAR 2024

I acknowledge that I received a copy of the Modern Woodmen Fraternal Leader Handbook ("**Handbook**") that I read it, understand it and agree to comply with it.

I understand that Modern Woodmen has the maximum discretion permitted by law to interpret, administer, change, modify or delete the policies, procedures and benefits contained in the Handbook at any time with or without notice. I agree to comply with any and all future changes to the Handbook. I also understand that any delay or failure by Modern Woodmen to enforce any policy or procedure in the Handbook does not waive Modern Woodmen's right to fully enforce the Handbook in the future.

I understand that nothing in the Handbook is intended to infringe on any of my available legal rights.

Print Name _____ **Date** _____

Signature _____

Your Chapter(s) and/or Youth Club(s) _____

Fraternal leaders are required to acknowledge receipt of the fraternal leader handbook and their agreement with it, annually. Please complete the acknowledgment form after reviewing the handbook. Upload the completed form to this [electronic form](#).