



2023-2024 Local Lodge Report Definitions

Part One: Traditional Lodge Data by State

Lodges

A lodge system is defined as the local unit of a fraternal benefit society into which members are elected, initiated or admitted in accordance with the society's constitution, laws or rules and ritual. Lodges are required to hold regular meetings directed toward the achievement of the purposes of the society. These subordinate local units may be known as lodges camps, courts, councils, branches, nests, or other designation.

Certificate Holders (Benefit Members) and Social Members

Certificate Holders are society members who retain life, accident or health insurance certificates, or annuity contracts, with their society.

Social members are society members who do not retain such policies but are active in the lodge system.

Community Service Events

A Community Service Event is any function, project or gathering of two or more members designed to assist needy individuals or the community at large. The event must be organized or sponsored by the society or one of its local lodges to qualify.

Community Service Hours measure the total hours contributed to Community Service Events by lodge members or others who work on projects directly sponsored by the local lodge.

Community Service Financial Disbursements are the total dollars spent by the lodge to assist needy individuals or to improve the community at large. This total includes all monies disbursed by the local lodge toward community service events and projects, including funds disbursed as a result of local lodge fund-raising activities.

Fraternal Social/Fellowship Activities

Fraternal Social/Fellowship Activities - tabulate the number of functions or gatherings that local lodge members conducted to carry out the business of the local lodge, promote fellowship among members, advance the purposes of the society or assist in the personal development of its members.

Fraternal Social/Fellowship Activities – Hours are the personnel hours devoted by local lodge members to lodge functions and activities other than community service functions. Hours include time attending, organizing, planning or working at fraternal events. Hours of home office or field personnel who are paid for their work are not included.

Fraternal Social/Fellowship Activities – Financial Disbursements are the total dollars spent to maintain and operate the lodge, carry out lodge activities or conduct fraternal events and can include hall rent, postage, utilities, insurance, office supplies, advertising, entertainment, refreshments, etc.

Home Office Contributions

Examples include:

- Home Office contributions or grants to unrelated 501c organizations
- Home Office contributions to a society's 501c3 organization
- Home Office contributions via employee gift-matching programs.

Part Two: Scholarships and Employment Data

Total **dollar amount** of all scholarships awarded per State.

Total **number of scholarships** awarded per State.

Number of employees by state (only count staff who are eligible to receive society health insurance)

Part Three: Fraternal Impact Data

This section allows you to provide society and business information, including narrative responses to questions about specific categories of fraternal activity/giving. Please use your best judgment when answering.

* Denotes required question

1. Are any scholarships awarded to non-members? (yes/no)
2. Does your society have an affiliated **501(c)(3) foundation**? * (yes/no)
3. Describe your society's **TWO most impactful community service events**.
(Please note the location – city and state if possible, total contribution amount if available, and other details that quantify impact. Sample 1: Our society collected 1,000 cans of food in August for the ABC shelter in Pittsburgh, PA. Sample 2: Our society donated \$50,000 to purchase laptops for at-risk students at schools in Charleston, SC. Sample 3: Our society recruited 100 volunteers to conduct a beach cleanup on Earth Day in Wilmington, NC. Sample 4: Our society delivered 100 boxes of clothes and home supplies on August 12 for victims of wildfires outside Denver, CO. Sample 4: Our society raised \$10,000 for supplies and coordinated a stuffing and sending event for military personnel stationed in xxx.)
4. Did your society participate in any initiative focused on **improving the environment**?
(for example, beach clean-up, recycling event, tree planting...) * – Yes/No/Unknown
5. Did your society participate in any initiative focused on **disaster relief**? (for example, clothing donation to impacted communities, distribution of gift cards or food, helping to clean-up following a disaster, rebuilding homes, etc.) * – Yes/No/Unknown
6. Did your society participate in any initiative focused on **ending hunger and food insecurity**? (for example, collecting food donations, contributing funds to a community food bank or the like, stuffing and/or distributing bags of food.) * – Yes/No/Unknown
7. Did your society participate in any initiative focused on **military and veteran outreach or support**? (for example, contributing to local veteran's groups, funding honor flights, securing housing for veterans, etc.)
* – Yes/No/Unknown

8. Did your society participate in any initiative focused on **underprivileged children**? (for example, contribution to schools, providing warm clothing, providing school supplies, supporting groups like Big Brothers Big Sisters, etc.) * – Yes/No/Unknown
9. Does your society home office or any chapter have established **partnerships with any of the non-profits** listed below?
Select all that apply.
- a. American Red Cross
 - b. Boys and Girls Clubs
 - c. Feeding America
 - d. Habitat for Humanity
 - e. Salvation Army
 - f. Toys for Tots
 - g. Veterans Foundation
10. Number of **captive agents** representing/selling only your society's products:
11. Number of **non-captive agents** who are contracted with your society:
(include any agents who are not considered captive per the previous question – i.e. independents, connected to agencies, IMOs, brokers, etc.)