

# POND / PUDDLE OPERATIONS GUIDE



**HONORABLE ORDER OF THE BLUE GOOSE, INTERNATIONAL**  
**(Founded in 1906 at Green Lake, Wisconsin)**

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**OFFICERS' GUIDE**

**AN EXPLANATION**

This guide is not designed to take the place of the Constitution, By-Laws or the Ritual, as these are the official rules of our Order. Instead, it is especially intended as a guide to the many Pond Officers who serve only one year in each officer chair and would like to receive some information about the culture of Blue Goose to serve well and provide mentorship to those that follow once his or her year is over.

This guide includes a section on the responsibilities of the Wielder, an important Pond Officer that usually serves in that role for several years. Yet, there is more information provided in the Wielder's Guide.

Many Ponds and Puddles have developed traditions, which should be continued, except when in direct conflict with Blue Goose rules and regulations. We hope that this manual will prove useful to you personally, to your Pond in general, and to the good of our Order collectively, as a tool in promoting the Cardinal Principles of our Order, which are ***Character, Charity and Fellowship***.

**BLUE GOOSE ... A FRATERNAL  
AND CHARITABLE ORGANIZATION**

The dictionary defines a fraternal organization as a type of social organization whose members freely associate for a mutually beneficial purpose such as for social, professional or honorary principles. In the case of the Blue Goose, we are bound together for the purpose of developing or fostering ***character, charity, and fellowship***. And, we are an organization made up of men and women associated with the insurance industry.

The Honorable Order of the Blue Goose, International's (HOBGI) website can be found at <http://www.bluegoose.org/> and we urge all Pond Officers to become familiar with the site's content. The site states that "HOBGI is a fraternal organization of individuals who work in the insurance related industry. As Ganders, we are members of Ponds located throughout the United States and Canada. There is fellowship, education, charity, and leadership in our organization. We invite you to learn more through our website. You will find ***character, charity, and fellowship*** in abundance among a welcoming group of friends. A place has been saved for you."

What separates the Blue Goose from other organizations is that our membership is drawn from many professions across the insurance industry. Our members include home office executives, field claims reps, auditors, underwriters, independent

adjusters, agents, brokers, investigators, repair and remediation contractors, regulators, accountants, appraisers, salvors, attorneys, engineers, as well as a host of others involved in support and consulting roles to the insurance industry. An official list of those in the insurance business who are eligible to join is outlined in our Constitution and By-Laws.

We meet socially to support charitable causes across the United States and Canada. The mutual connection between our members is the career experience we have in our chosen field. Being a Pond Officer, and promoting Blue Goose to your peers, co-workers, and colleagues will help us grow and strengthen the organization and offer leadership and career development opportunities to those involved. We have each found reasons to give our time to Blue Goose when we all have other demands on our time.

Please note that while we are an organization that charity as one of precepts, we are not recognized as a public charity by the Internal Revenue Service, but rather as a fraternal organization under section 501(c) (8).

The Blue Goose website continues with a comprehensive overview of the Blue Goose culture and may offer you essential talking points to explain the Order to those unfamiliar with it, and to hopefully recruit new members.

There is **fellowship**. We are a community of interest, experience, activity, and feeling. This community nature is something larger and yet more intimate than a business association or networking group. We are genuine friends.

There is **education**. Many of our Ponds have speakers on interesting and practical topics. Some have certified continuing education programs. Blue Goose promotes IIA, IIC, and CPCU programs. Blue Goose presents annual awards for academic excellence to individuals earning the highest grades in competitive IIA examinations. We continue to grow in our profession.

There is **charity**. The Ponds, each in its own way, provide needed support for a variety of charities. Some spread donations over several charities. We help those in need.

There is **leadership**. When we give of ourselves in the work of Blue Goose and when we are elected to office in Blue Goose, we gain experience in new areas. Poise and confidence is gained in the administration of activities and in the management of others and in the promotion of growth in our membership.

Leadership is also important to the advance of our mission of giving back ... to our community in Charity, to each other in friendship and fellowship and to ourselves in character and integrity in our work and dealings with each other.

## OFFICERS AND EXECUTIVE COMMITTEE MEETINGS

The Pond Executive Committee is composed of the MLG, SOF and WGQ, but other officers and PMLG'S can attend these meetings if asked to by the MLG. The members and/or chairmen of any interested committee(s) may also be invited. Much of the Pond business can be handled at these meetings and ratified at a Pond meeting, saving time and promoting efficiency.

Team effort is essential. ***Each officer should know his or her duties and attend all meetings.*** Committee chairmen and members should be prepared to discuss and make recommendations on matters related to their committee.

### OFFICERS' DUTIES:

#### Most Loyal Gander (MLG)

- Preside at all business meetings; appoints all committee chairs.
- Maintain custody of the honker.
- Become familiar with Roberts Rules of Order for proper conduct of official meetings of the Pond or Puddle.
- Maintain his / her own copy of the most current edition of the official Blue Goose *Initiatory Ceremony and Ritual* and should be familiar with the parts he / she will be required to recite during Membership Initiations, Memorial Services, or Officer Installations.
- Supervision of the duties of all other officers and committees.
- Teach the Cardinal Principles of Character, Charity and Fellowship to the entire Pond or Puddle membership as well as demonstrate these principles in your own life.
- Maintain and enforce the duty of loyalty that all officers must display to the Pond or Puddle as well as to the Grand Nest.
- Use as your guide, the most currently updated Constitution and Bylaws of the Order of the Blue Goose International in all decisions of the Pond or Puddle in recognition of the Grand Nest, which is our governing body.
- Initiate and carry through to completion all annual programs for the education and entertainment of the membership and the good of the Order.
- Thoroughly familiarize yourself with the policies and traditions of the Puddle or Pond as well as the Order.
- Assure that the Pond (or Puddle) honker and banner are present at all meetings, either through personal possession or delegation of these responsibilities. [Should the honker become lost, replacement can be purchased at any outdoor / hunting & fishing goods store, such as Cabela's, Gander Mountain, Dick's Sporting Goods or Bass Pro Shop.]

#### Supervisor of the Flock (SOF)

- Preside at business meetings in the absence of the Most Loyal Gander.
- Become familiar with Roberts Rules of Order for proper conduct of official meetings of the Pond or Puddle when necessary.
- Maintain his / her own copy of the most current edition of the official Blue Goose *Initiatory Ceremony and Ritual* and should be familiar with the parts

he / she will be required to recite during Membership Initiations, Memorial Services, or Officer Installations.

- Responsible for coordinating meeting arrangements including:
    1. Assure officers are present, or that substitutes are provided.
    2. Collects report from applicable committees.
    3. Confirm meeting facilities are arranged and head count provided.
    4. Arrives early to make certain room is properly set up.
    5. May be assigned responsibility for arranging the meeting facility.
    6. Could be assigned as chair of any committee.
    7. Reports to MLG that meeting arrangements have been completed.
- Perform all other duties as appointed by the Most Loyal Gander.

### **Custodian of the Ganders or Goslings (COG)**

- Maintain his / her own copy of the most current edition of the official Blue Goose *Initiatory Ceremony and Ritual* and should be familiar with the parts he / she will be required to recite during Membership Initiations, Memorial Services, or Officer Installations.
- Responsible for making certain that there are Goslings present for initiation.
- Typically in charge of the Membership Committee and Rush for Goslings.
- Perform all other duties as appointed by the Most Loyal Gander.

### **Guardian of the Pond (GOP)**

- Maintain his / her own copy of the most current edition of the official Blue Goose *Initiatory Ceremony and Ritual* and should be familiar with the parts he / she will be required to recite during Membership Initiations, Memorial Services, or Officer Installations.
- Perform all other duties as appointed by the Most Loyal Gander.

### **Keeper of the Golden Goose Egg (KGGE)**

- Unless performed by the Wielder, the Keeper is the Pond's Treasurer and is responsible for depositing any checks, paying any invoices, and coordinating with those managing the Pond or Puddle's events and activities to accurately track and document electronically received funds, such as those collected in a PayPal account.
- Perform all other duties as appointed by the Most Loyal Gander.

### **Wielder of the Goose Quill (WGQ)**

- Please refer to the *Wielder's Guide*, attached to this Guide.
- An active, interested, permanent Wielder who has sufficient time to perform his or her duties, as outlined in the Wielder's Guide, is an invaluable asset for the Pond or Puddle. It is recommended that each Wielder and Officer become familiar with the duties of all other officers. It is important that the Most Loyal Gander and the Wielder always work closely together and keep each other informed of all activities and plans.
- May be appointed to perform the duties of the Treasurer (Keeper).
- Puddle Wielders must coordinate all activities with their Pond Wielder.

## TO THE NEW MOST LOYAL GANDER

You have been honored by election to the highest office in your Pond. You are the face of your Pond. You preside over the meetings and make sure the Pond follows our rituals and procedures and honors our Cardinal Precepts.

During the installation ceremony you listened to the rules by which you are to be guided. The basic duties of your office were outlined and you vowed to follow them. It would be very helpful if you thoughtfully re-read this ceremony in the ritual, and also to familiarize yourself with Section 5 of the Bylaws that pertains to Pond Government. The welfare of the Pond or Puddle is your responsibility, and as the Most Loyal Gander, it is ***your leadership that determines the level of its success.***

That leadership should include setting the proper direction for the program year that includes a focus on the concepts of ***character, charity and fellowship.*** We have found that those Ponds and Puddles that focus on our precepts as the foundation to their planning are the most successful and active ones in the Order.

## COMMITTEES

Nothing pays off like appointing excellent committees, headed by interested chairpersons. It is important that new Ganders be offered the opportunity to serve on committees to help them become involved in Pond or Puddle activities. Past Most Loyal Ganders (PMLGs) should be encouraged to assist and guide these new Ganders, as they can be very helpful and enthusiastic in their support of Blue Goose. A committee chair requires members who are available to accomplish the tasks appointed. ***Be sure to apprise those whose employment requires them to do extensive traveling to be honest about their ability to work on the committee before agreeing to serve.*** Some committees are active throughout the program year while others need only be active for short periods in the year to accomplish specified tasks. An example would be the Rush for Goslings committee that is active through to the Rush Event and follow up then inactive until another Rush Event is desired.

***Remember one person cannot do it all,*** and there are many in the Pond or Puddle who would like to help you, and only need to be asked. Sharing the responsibilities of the organization helps the Pond or Puddle to operate more efficiently while getting more of the members involved in the success of its programs. More such involvement also encourages creativity on the part of the members of the Pond or Puddle which further promotes our mission of ***Character, Charity and Fellowship.***

Examples of Pond or Puddle Committees include the following:

Charity	Executive Initiation & Ritual
Delegate Selection / Expenses	Fellowship Fund
Flowers & Visitation	Golf
Jurisprudence	Historian
Membership	Rush for Goslings
Memorial	Nominating
Pond Publication & Communication	Activities, Program & Speakers
Publicity	Scholarships
Social Functions	Social Media
Special Events	Special Fundraising
Website / Web Master	

Descriptions of some of the committees that Ponds or Puddles have formed over the years are provided below and on the ensuing pages for your reference. You may not require all of those listed, but they provide you with ideas for your local planning and you may wish to add additional committees of your own for special activities or programs centered on the mission of the Order.

### **Charity Committee**

Charity is one of the Orders' three Cardinal Precepts, so the support of charitable causes should be one your Pond's primary objectives. Charitable causes can be supported in ways as simple as a food or personal care item collection for your local homeless shelter or a toy collection for needy children. Many Ponds hold collection drives to support the military. Don't overlook the value and personal enrichment your Pond members will receive from volunteering their time- the possibilities are endless - Habitat for Humanity, Special Olympics, cooking and serving meals at your local shelter. If your Pond is financially healthy, some sort of a Scholarship Program for the dependent children of your members is also a popular choice.

### **Executive Initiation & Ritual Committee**

Officers should conduct initiations and ritual ceremonies, or an initiation team should be formed. All officers and team members should become proficient in his or her part so that the initiation will be conducted impressively with the utmost decorum. Some Ponds provide special identifications for the Goslings, and the installing officers are uniformly dressed, which makes the ceremony more impressive. Every effort should be made to have a large turnout from the membership, and that the new Ganders are extended the hospitality and fellowship of the Pond. Remember this is their first impression as a member of the Blue Goose, so it is important that it is a favorable one. Some Ponds and Puddles give new members an Initiation kit or folder, consisting of a history of the Order, a history of the Pond, contact information for the officers, a Pond roster, a summary of the Pond's chartable work, etc.

## **Convention Delegate Selection and Expenses**

It is critically important for each Pond to plan, budget and send two delegates to the international convention. The delegates to the convention, as duly authorized representative of their respective Ponds, are the Grand Nest. It has been said many times over the years, that no one really understands Blue Goose until they attend a Grand Nest Convention. Most Ponds send the incoming Most Loyal Gander as one of its delegates, so that he or she can become familiar with how the Grand Nest functions, what is expected from the Pond, and how they can assist during his or her term as Most Loyal Gander. If a second delegate is to be sent, he or she may be the permanent Wielder, or the outgoing MLG, a candidate for Grand Nest Office, a Past Most Loyal Grand Gander, or a member who by his or her dedication and service to the Pond is deserving of this privilege.

A committee to determine how many delegates will go can nominate such prospects and recommend what financial help the Pond will provide as to registration, meals, hotel and transportation. Refer to Section 3- (G) of the Bylaws regarding transportation reimbursement to the Pond, the Grand Wielder has forms for this purpose. It is important that the Delegate(s) attend all of the meetings and respond to roll calls at the convention if the Pond is to be reimbursed for the Delegate's traveling expenses.

Delegates should also be familiar with the Pond's position on any constitutional amendments to the international Constitution and Bylaws that are coming up for vote at the international convention. In cooperation with the Most Loyal Gander, the Pond should provide for an appropriate to debate and discuss any such proposed amendments to assure that proper voting instructions are provided to the Delegates.

## **Flowers and Visitation (Sunshine) Committee**

To be remembered by your fellow Ganders when there is sickness or death is most appreciated. A good alert committee, properly informed when they are needed, can do much by calling personally and perhaps sending a gift, or at least a card. A phone call or e-mail from time to time will help, too. When possible, a get well card or sympathy card should be passed around to the Ganders for signature at the monthly meeting and delivered personally by a member or members. This is truly Blue Goose as it demonstrates the Fellowship of our Order.

## **Membership Committee Including "Rush for Goslings" Committee**

New members are the lifeblood of our fraternity, for without them, this Order would become extinct, so recruiting new members should be a year-round task. Be familiar with the Grand Nest's "***Rush for Goslings***" initiative - a membership drive scheduled every fall that is modeled after fraternity and sorority rush events.

All Ponds and Puddles are encouraged to come up with a fun rush event designed to get existing members involved and active in recruiting new members.

The Membership Committee should provide every member with membership applications and links to the Grand Nest and applicable Pond or Puddle websites. Check with the Grand Nest to see if any brochures or recruiting materials are available. Encourage the members to seek out new membership prospects among their everyday contacts with co-workers and business associates in the insurance industry. It is important to note that the Blue Goose is not a marketing organization or business club or civic group, but rather a fraternal group of men and women that seek a common objective in the insurance community, to promote ***character, charity and fellowship***.

All members should be encouraged to invite prospective new members to join, and the recruitment and initiation of new members should be occurring on a regular basis throughout the program year.

The initiation process is important to the growth in membership. Each Pond should be willing to have regular initiations in order to provide for regular membership growth. Too many Ponds and Puddles have just one annual initiation night and that may result in many prospective new members not joining because of the time lag in becoming an active member. Unless the Pond or Puddle is within a month or so of a formal initiation ceremony, then new Goslings should be initiated prior to the next regular meeting.

Once a new member has been accepted, be sure that their names are placed on the e-mail list and invite them to attend meetings even if their initiation will be scheduled at a later time. Be sure that members are informed about the Membership Cup, Fellowship Cup and No Drop-out Cup and ask for their support in competing for these awards. The more members we have, the more friends we have in Blue Goose to share in the responsibilities of the local Pond or Puddle, and the more value Blue Goose is to every Gander.

### **Memorial Service Committee**

This ceremony can be very impressive. Consider adding features like having acquaintances of any Gander that has taken his or her last long flight to speak, or add appropriate music, or have 'taps' played.

Since the Memorial Service is for all departed Ganders in both of our countries during all of our history, the ceremony should be held even if no Gander has passed away during the year. It is also recommended that the widows or widowers of the departed Ganders be invited to attend this ceremony.

Be sure to consult the ritual for the proper words to say during the memorial service.

## **Nominating Committee**

Selection of good Pond Officers is essential, as one poor or inactive officer can hurt a Pond for several years, while good officers can make the difference between the success or failure of the Pond. A well-functioning Nominating Committee should evaluate prospects, and take into consideration the following qualifications:

1. Candidate must have a real interest in Blue Goose.
2. Must have ability and enthusiasm.
3. Committee should avoid a candidate with limited interest, such as entertainment alone.
4. Does he or she have a reputation for "following through"?
5. Consider his or her length of membership in your Pond and elsewhere.
6. Does he or she regularly attend Pond meetings?
7. Is he or she willing to help with Pond activities, either volunteering or when requested?
8. Would the prospective officer be out of town too much?
9. Is he or she willing to spend the time required to perform the duties of the office?
10. Are they willing to attend the Grand Nest Convention as incoming Most Loyal Gander?

## **Pond Publication and Communication Committee**

Communication between the Pond and its membership is a most vital part of any Pond. Through the use of Pond publications, website content, e-mail announcements, and a consistent social media campaign, there are tremendous opportunities to keep your members informed on the monthly meetings, Grand Nest activities, social affairs, promotions, transfers, illness, last long flights, and any other information that would be of interest to the members.

If your Pond has a newsletter or website, all Ganders should be encouraged to submit articles or photos of Ganders and Pond functions to the editor or webmaster for publication that would be of interest to the Pond members. Pictures of Pond members and their activities are also recommended. The cost of the Pond publication can be held to a minimum by making it an electronic publication that is posted or linked to your website, with only hardcopies mailed to those members who don't have email. The newsletter can also help raise contributions to charity and funds for Pond operations by selling space to advertisers.

Please bear in mind that the Grand Nest email blast system offers your Pond the capability of sending everyone in your Pond an email. Local Ponds and Puddles can use this system to send out notifications to their members as well as invite others in nearby Ponds or Puddles. Note, however, that the email blast system is only available to send email messages to registered Ganders on the Blue Goose database. As such, Goslings or prospective new members and other guests would need to be emailed separately. It is important to keep the emails up to date as well.

A copy of the Pond publication should be sent to the Grand Nest Publication Committee to compete for the annual Link of the Year award. Grand Nest Officers (especially the officer for your particular region) should be on the mailing list. Also, consider posting the newsletter on social media sites that your Pond participates in such as Facebook, Linked In, Twitter, Instagram, etc.

### **Program Committee and Monthly Meetings**

There should be a planning session for the Pond during the summer to lay out the agenda, theme and program for the upcoming year. How often will your Pond meet? Will you have the same or a varied location? Planning should include a strategy for membership growth and retention, as well as deciding on charitable programs, volunteer opportunities, and plans to promote activities centered around the promotion of ethics and integrity in the insurance business; in other words, the development of character.

Every Pond has a different approach to their meetings. We encourage you to be creative in the design and planning of Pond or Puddle activities. The focus should be to have fun and help the local community through charity centered activities. We have found that the *Ponds or Puddles that often participate together in charitable activities are the strongest most active chapters in our Order.* In other words, this is the **key to Pond success**. Encourage the Ponds and Puddles to have an annual theme such as “Building Together and Having Fun” (centered around Habitat for Humanity as a primary charity) or “Making New Friends and Helping Children” (centered around raising money for children’s charities or volunteering to feed families whose children are in the hospital) or “Blue Goose on Mission to Support our Veterans” (centered on visiting veteran’s hospitals, raising money for veteran’s causes and volunteering to work or visit our veterans at veteran’s homes).

Some Ponds meet on a monthly basis, some meet a few times a year, some have dinners, while others meet at lunch, breakfast or a social hour. Some Ponds feature guest speakers, while some feature social meetings at fun venues. Other Ponds partner with other local insurance organizations for an “All Industry” event. Some Ponds volunteer for charitable events such as serving a meal at a shelter, or sponsoring a Relay for Life team, or volunteering for Habitat for Humanity, or singing Christmas carols at a local hospice or nursing home. The choice is yours; be creative as long as it is centered on the precepts of our Order.

Most Ponds will have a meeting every month, except during summer vacation times, which is when the annual international convention takes place. The Program Chairman is responsible for obtaining a guest speaker if the Pond wants a speaker, or deciding on the characteristics of a program that would be of interest to the members. As the *attendance at these meetings is dependent upon the quality of the program;* it is important to have a Program Chairman that will spend whatever time and effort is required to be selective in planning this program.

The meeting should start on time and not be excessive in length, as this discourages members who have business appointments from returning. Conducting necessary business during the meals will help to avoid lengthy meetings. Be creative, have fun and focus on the precepts of our Order and the members will want to be involved.

### **Publicity Committee**

Take every opportunity to draw attention to the good work of our Order in the local press and insurance publications. You can download a good number of Press Release templates and submit articles to your local papers and website calendars. New officers and Pond or Puddle sponsorship or involvement in seminars or election to office should not be overlooked. Charitable endeavors involving members or Pond / Puddle donations, collections, or volunteer hours are all newsworthy events that should be publicized with a link to the local or Grand Nest website.

Press releases are a great way to promote upcoming events and possibly gain press coverage. Most television and radio stations, plus newspapers and magazines offer you the ability to upload releases and photographs. When you write a press release, remember the five W's: WHO, WHERE, WHEN, WHAT and WHY.

### **Social Functions**

In addition to your regular meetings, holiday parties and golf outings, consider adding family events like picnics, trips to sporting events, amusement parks, etc. Again, we would like to emphasize the importance of being creative, having fun and focus on the precepts of our Order and the members will want to be involved.

### **SOCIAL MEDIA**

There is a Facebook and Linked-In page for the entire Order, and we urge all members across the US and Canada to join. We further encourage each Pond and Puddle to create and publicize their own Facebook and Linked-In pages and become active on Twitter and Instagram as well as other social media sites. This is where many of our members and prospective members surf and as such is a great way to communicate with our constituency.

### **ANNUAL MEETINGS**

Each Pond is required to have an Annual Business Meeting, usually in May or June but prior to July 1st, which is the start of the Pond's fiscal year. At this meeting, a number of very important things should be completed. These may include planning for the annual program, new member recruitment and initiation, memorial service and new officer installations for the coming year. Many Ponds announce their charity awards and Pond Scholarships at this meeting as well.

Some Ponds and Puddles use this opportunity to recognize the accomplishments of its members including the awarding of special year pins and life pins.

In years in which a constitutional amendment is being proposed for vote at the upcoming convention, the Annual Meeting is a good opportunity to have the proposal read and debated for Pond consensus as to how to instruct the Delegates to vote.

## DUES

The collection of dues is a very important and seemingly never ending job yet every effort should be made to collect them promptly to help your Pond or Puddle's financial operation and support the Grand Nest's cash flow requirements to meet international expenses and obligations. ***Each Pond's Wielder is responsible for sending an accurate membership list to the Grand Wielder before September 1st of each year, along with remittance in full for the Grand Nest dues of twenty-seven dollars (\$27.00) U.S. for each Gander.*** Grand Nest dues provide the financial support for the Grand Nest Bulletin, advertising budget, Officer Travel expenses, computer and data expenses, and other Grand Nest operating costs. The Grand Nest returns to each Pond a percentage of these dues by reimbursing a portion of the delegate(s) transportation expenses to the Grand Nest Convention.

We strongly encourage your Pond or Puddle to utilize an electronic system for billing and collecting dues. The Pay Pal system has worked out very well for many Ponds that use it for their meeting registration payments, golf outings, and dues. It works very well and is easy to set up. We have a network of Ganders that can act as an internal resource willing to assist Ponds interested in getting the system up and running. Contact the Grand Wielder or your regional Grand Nest Officer regarding these resources in your area.

The Pond or Puddle's Wielder should send dues notices to all of the members. Historically, we have found that the majority of the members will pay their dues upon receipt of the initial notice. However, for those Ganders who do not respond on the initial dues mailing, a reminder notice should be sent, and where necessary a personal contact may be required.

Members may have changed jobs and / or email addresses during the course of the year, so it is a good idea to follow up in a variety of manners. Many Ponds and Puddles provide a team of Ganders to help the Wielder make phone calls to follow up with those who haven't paid dues. This is also a great opportunity to encourage your members to get involved by updating them on upcoming activities and events.

Remember that "once a Blue Goose always a Blue Goose," as long as you pay your dues". In other words, where members may have left the insurance industry they are welcome to continue their membership in our Order.

## POND ROSTER AND CONTACTS

Email is the most common way that Pond and Puddles communicate with their membership, but sometimes a phone call is the best way of contacting someone. Email addresses change with jobs, and sometimes our email distribution lists are not current. Every effort should be made to work with your Pond's Wielder to maintain a current and updated telephone list and Pond / Puddle roster.

A current Pond Roster should be provided to each member, listing their names, email addresses, home and office telephone numbers and addresses and business connection. The roster also should include the officers of the Pond and Past Most Loyal Ganders. Life members and 25 year members can be identified by a symbol following the name. The roster might show the membership of each committee with their telephone numbers. Consider posting some of this information on your Pond website.

If you'd like to create a paper roster, you can create one from the Grand Nest Membership Database, using the "Labels and Mail Merge" function of "View Reports" to produce a Pond Roster using the "Mail Merge Wizard" of Microsoft Word. Keep in mind that some jurisdictions have privacy laws prohibiting publication of certain data. Never publish a member or person's birthdate! If you recognize birthdays at your meetings, never broadcast the year.

## POND / PUDDLE SURVEYS

Occasionally, your Pond or Puddle might receive a survey from Grand Nest regarding such things as dues, how often the Ponds or Puddles meet, where they gathered, what sort of programs are presented, whether they meet for dinners or luncheons, when did a Grand Nest Officer last visit, whether they have a roster or publish a Pond publication, have a permanent Wielder or other information regarding Pond activities that is developed from these surveys. If your Pond or Puddle receives a survey, please complete and return them promptly.

Should your Pond wish to create its own survey to gather information from your members, there are many websites you can use for a customized questionnaire, such as <https://www.surveymonkey.com>.

## GRAND NEST OFFICER VISITS

If you wish to have the Most Loyal Grand Gander (MLGG) visit your Pond or Puddle, invite him or her early in the program year. If accepted, be sure to offer him or her assistance in arranging for travel and hotel reservations as well financial reimbursement for some of these if approved by the Pond or Puddle's Board of Directors. The Most Loyal Gander, or in his or her absence, an officer or PMLG so appointed should arrange to meet the MLGG upon arrival. And, someone should be appointed to assure that the hospitality of the Pond is available during the visit.

If the MLGG is unable to visit your Pond or Puddle, another Grand Nest Officer may attend in his or her place and should be extended the same courtesy and fellowship that would be given to the MLGG. It is important that the members of your Pond or Puddle are given advance notice of a pending visit from the MLGG, or Grand Nest Officer, and they should be encouraged to attend this meeting. A large turnout of attendance from the Pond or Puddle is the best way to honor the office of the MLGG and to show the Pond or puddle's appreciation for the official visit.

## **GRAND NEST CONVENTION**

It is extremely important that every Pond plan on sending preferably two, but no less than one delegate to every Grand Nest Convention. This should be a regular component cost to the budget planning for each Pond to assure that they have sufficient funds to support their delegates to the convention. Attendance and participation at the Grand Nest Conventions is a critically important component to the health and vitality and connection of the Ponds and Puddles to the Blue Goose as a whole. It is there that we make new friends from around Canada and the United States and forge important bonds of fellowship that bridge the Order to the future. It is also a great way to garner new ideas for local Pond operations and activities. Remember (subject to limits based on the number of dues paying members of your Pond) that the travel costs for your Pond's delegates to attend the convention is paid by the Grand Nest. It is also customary for Ponds (depending on their financial health) to subsidize their Delegates registration and hotel costs with a stipend. These costs should also be included in your budget planning.

Additionally, please encourage your members, their spouses and families to attend the Grand Nest Conventions, as it helps to develop fellowship and provides for a better understanding of Blue Goose. Consult with the Pond in your region that is hosting the Grand Nest Convention to determine if you can offer them any assistance, such as a cash contribution, or sponsorship of a special event.

Performing the Model Initiation or conducting the Memorial Service also can be helpful to the host Pond. Don't overlook the possibilities of hosting a Grand Nest Convention and nominating a candidate for a Grand Nest office.

## **CONVENTION DELEGATES**

Many Ponds select their Convention delegates at their Annual Meeting in May, and the delegates' names are submitted by the Pond's Wielder to the Grand Nest prior to the Convention.

Delegates must be present at the Convention's business meeting roll calls. The reimbursement of delegate travel costs is conditional upon the delegates being present at these meetings as well as the Regional break-out meetings.

## REGIONAL ORGANIZATION

Blue Goose is organized into geographic regions. The current organization includes five regions, Eastern, Canadian, Central, Southern, and Western. Each region is represented by a Grand Nest officer. The regions have Mid-Year meetings where Ganders from all of the Ponds within each region are invited to share ideas and discuss Blue Goose issues over a weekend of fellowship. There are also regional break-out meetings at the Grand Nest Conventions for a similar purpose. Typical agenda items for these meetings might include a discussion of future convention host Ponds, regional concerns, what is and is not working for the Ponds, sharing Pond calendars and participation in events of other Ponds, sharing of ideas for programs, charities and activities and assistance with new Ponds or Puddles.

### DEPUTY MOST LOYAL GRAND GANDERS (DMLGGs)

The Deputy Most Loyal Grand Ganders or DMLGGs are appointed by the Grand Nest Officer of each Region in order to provide a communication and commissioner role to each Pond or Puddle. Every region should have several Deputy Most Loyal Grand Ganders (DMLGGs) who serve at the pleasure of the Grand Nest officer representing that region. The DMLGGs are a liaison between the Ponds and Puddles and the Grand Nest.

The number of DMLGGs in each region will vary with the number of Ponds in that region. Each DMLGG is aligned with specific Ponds and Puddles and should assist them and the Grand Nest with such issues as organization, convention participation, regional functions such as Mid-Year meetings as well as dues, membership, charity etc. Visitation of the Ponds and Puddles within the DMLGG's jurisdiction is highly encouraged and greatly appreciated.

### PUDDLES

The organization of a Puddle is most efficient in areas with insufficient numbers of members to constitute a Pond, as required in Article II of the Constitution. Puddles should be geographically located so that regular contact with their home Pond is feasible. Before attempting to form a Puddle, it is well to contact the Grand Nest Officer or DMLGG in your region for suggestions, advice and assistance. Puddle meetings and social events may well be combined with the Pond's affairs. Ganders are at liberty to join any Pond or Puddle they wish, including where they may cross State or Provincial boundaries, if its membership will be more valuable, and some may wish to maintain dual membership.

Puddles may petition for a Charter to become a Pond and are encouraged to do so where the volume of membership supports and the local members desire. The conversion of the Puddle to a Pond brings independent organization and the new Pond's right to have its own delegates to the Grand Nest Convention. All members who sign the original Charter Petition will be known as '**Charter Members**' of the new Pond.

## CONSTITUTION AND BYLAWS CHANGES

Proposed amendments to the Constitution and Bylaws will be sent to the Wielder of each Pond (who should distribute to each Puddle within their Pond) from the Grand Wielder's office. All proposals are to be presented at your annual meeting and voted upon with instructions for the delegates attending the upcoming convention. These instructions may include to vote: Yea, Nay, or the Pond may allow for the Delegates to be 'uninstructed,' which allows for them to listen further to the debate of the proposal at the convention and vote accordingly. Roberts Rules of Order must be observed.

### ANNIVERSARY PINS

An "Anniversary Report" can be generated from the Blue Goose database, providing the Wielder with a list of those eligible to receive 10, 25, 30, 40 and 50 year pins. These pins, as well as the new Gander membership pins, can be ordered from Grand Nest to recognize and reward our long-tenured members and thank them for their loyalty. Please use this report and order the pins needed well in advance of the actual awarding of the pin. The annual meeting in April or May, or a high profile charitable event are excellent opportunities to award anniversary pins.

### LIFE MEMBERSHIPS

Any Gander who has been an active member and paid dues for twenty-five (25) years, qualifies for Life Membership and is no longer obligated to pay annual dues if he or she meets at least **one** of the three following qualifications, remember that 25 years of membership must be attained first.

1. They have retired from the mainstream of their business and are not gainfully employed, and their age plus years of membership equals or exceeds 90 years. Since some retirees continue to work part-time, a helpful guideline to determine retirement would be if the Gander qualifies for full Social Security benefits.
2. They have attained the age of seventy (70) years and have twenty-five (25) or more years of paid membership. They may still be employed and still become a Life member.
3. A Gander who has retired because of ill health or dismemberment, with the consent of their employer, may apply to the Grand Nest Executive Committee (top three Grand Nest Officers) for Life Membership. The decision of the Grand Nest Executive Committee is final and not eligible for appeal. The local Pond or Puddle has no authority in this decision.

This is why the membership application asks for date of birth and the membership data shows the years of membership and date of birth.

## ORDERING ANNIVERSARY PINS AND PLAQUES

Refer to the Wielders Corner on the Blue Goose website at <http://www.bluegoose.org> to see a list of the anniversary pins, membership plaques and camera ready Blue Goose logos. Pins and plaques **must be ordered** through the Grand Wielder's office.

Please project your Pond's pin needs in advance, and place your Pond's orders early, and keep an adequate supply of pins on hand to ensure that you have the pins your Pond will require for the current program year and beyond. You will quickly learn which pins are used the most and the approximate quantity to keep in stock. *ACCOUNTS ARE PAYABLE WITHIN 30 DAYS OF RECEIPT OF YOUR ORDER.*

The Most Loyal Gander and Life Membership plaques are professionally crafted and inexpensive. They must be ordered through the Grand Wielder, however, you will be billed by the supplier. The Grand Wielder needs the type of plaque, name of Gander, Pond or Puddle name, date and where to send it. You cannot use a P.O. Box for this address. Most Ponds and Puddles award PMLG pins, Life pins, and the related plaques at a special meeting or the Annual Meeting.

## INTERNAL REVENUE SERVICE (IRS)

If your gross receipts exceed \$50,000 in any one year, then a completed informational return (IRS form 990 or 990EZ) must be filed on an annual basis. The designation number effective for years beginning after June 30, 1981, is Section 501(c)(10). This is the fraternal organization designation and should be used in any correspondence with the IRS.

If your gross receipts do not exceed \$50,000, the IRS requires you to file an e-Postcard (990-N) annually within four and a half months after the close of your fiscal year.

It is important that each Pond apply and use its own Employer Identification Number (EIN). This can be applied for online through the IRS website or the application form (Form SS-4) can be downloaded and submitted by fax or regular mail.

The Grand Nest through its Grand Wielder reports to the IRS every year all authorized subordinates to the Blue Goose International. Each such subordinate is appointed a Group Exemption Number, which should be used in filing your local informational tax returns as well as any correspondence with the IRS. This information is also useful in opening bank accounts. Puddles should use the Pond's information to open bank accounts, but should set up their own independent bank accounts upon becoming a Pond and transfer all funds from the Puddle account to the Pond Account and close the previous account accordingly.

You may contact the Grand Wielder for additional assistance, if necessary. And, CPAs who are members of your local Pond or Puddle may also be valuable resources in these matters.

## **AWARDS PRESENTED BY GRAND NEST**

The following awards are presented at the Grand Nest's annual convention with the intent to recognize Ponds with outstanding achievements and inspire other Ponds:

1. **MEMBERSHIP AWARD:** The winner is the Pond which, by June 30, has reported fully to Grand Nest and has garnered the HIGHEST percentage (%) increase in membership for the preceding fiscal year.
2. **COMMUNICATION AWARD:** This is awarded to a Pond which has an outstanding communication strategy.
3. **FIRST TIMERS (PEACE GARDEN AWARD):** Awarded to the Pond with the most first time convention attendees, other than the host Pond.
4. **REGIONAL CHALLENGE AWARD:** Awarded to the Region with the best score in the combined membership criteria.
5. **REGIONAL GROWTH AWARDS:** Grand Nest awards amounts annually as follows:
  - a. \$125 for that Pond within a region that secures the most new and reinstated members for the preceding fiscal year.
  - b. \$125 for that Pond within a region securing the best percent (%) increase in membership.

Some years, the same Pond wins both awards

### ***ALL CHECKS WILL BE ISSUED IN THE NAME OF THE WINNER'S FAVORITE CHARITIES.***

6. **GANDER OF THE YEAR AWARD:** This award is bestowed upon a Gander that has demonstrated strong CHARACTER, great FELLOWSHIP and given in CHARITY for all Blue Goose.
7. **COMMUNITY SERVICE AWARD:** Awarded to the Pond that volunteers their time and services to a local charity. This award is considered an Honorable Mention Award to the Gordon Crowther Charity Award of Excellence.

8. **CHARITY FUND RAISING AWARD:** Awarded to the Pond that has raised funds for local charities. This award is not necessarily on the greatest amount of funds, but what has the Pond done to include all their membership in the fund-raising effort. This award is considered an Honorable Mention Award to the Gordon Crowther Charity Award of Excellence.
9. **SCHOLARSHIP AWARD:** Awarded to the Pond that provided one or more scholarships to deserving individual or individuals. This award is not based on the greatest amount of scholarship dollars but on the effort displayed in raising these funds. This award is considered an Honorable Mention Award to the Gordon Crowther Charity Award of Excellence.
10. **GORDON CROWTHER CHARITY AWARD OF EXCELLENCE:** Awarded to a Pond for outstanding charity activities, as judged by the previous recipient Pond. This award is judged on subjective criteria (not strictly on the amount donated). Financial donations and other important criteria such as food/toy/clothing donations and volunteering of time and service is considered. The previous recipient Pond is not eligible for the award.

Additional Awards/Grants include:

11. **HOBGI EDUCATIONAL AWARDS:** HOBGI will make donation to the IIA/CPCU Institutes and to the Canadian Institute of Insurance, if these entities request a donation.
12. **HOBGI POND MATCHING AWARDS:** Grand Nest will match up to \$100 for any Pond's Awards to both an educational and charitable recipient annually (\$200 maximum per Pond).

You must provide the GWGQ with the name of the recipient organization and a copy of the Pond's check, at which time the Grand Nest will issue a matching check in the same amount, up to \$100, to the recipient. Checks will be mailed to the Pond for presentation.

13. **HOBGI INTERNATIONAL CHARITY AWARD:** The Special Olympics has been established to be the HOBGI's designated charity. Each year HOBGI submits to this charity \$500. The allocation of designated \$500 is by establishing what the percentage of active dues paying members are in the USA; and what percentage of active dues paying members are in Canada. This percentage then is applied to \$500 to be appropriately allocated between the USA and Canada Special Olympics organizations.

## **ADDITIONAL RESOURCES**

There are other resources available to you, which provide additional valuable information. As available and or updated, these resources will be uploaded to the Wielder's Corner on the website and include the following:

**Wielder's Guide** This guide provides additional information regarding the responsibilities of the Wielder including insight into available resources.

**Database User Manual** This manual provides guidance into the use of the Blue Goose database.

**Insurance Coverage** This resource provides a summary of the insurance products that are provided by the Grand Nest for the benefit of all Ponds in the Order. In that these coverages are modified on occasion, this information is being provided separately to facilitate providing our Ponds and Puddles with up to date information.

**Credit Card Analysis** This memorandum provides an in-depth overview on the use of Credit/Debit card payments for Blue Goose. This document should be read thoroughly by the Pond prior to implementing such activity.