

FRATERNAL LEADER



A Message from Senior Vice President John Borgen

Dear Chapter Leader:

Maybe it's the warmer temperatures, the bright green lawns and trees, the fragrant flowers, or the sound of birds that have finally returned home. In spring, the world seems fully alive and new once again!

Growth, transformation, renewal . . . these are words which characterize that same sense of newness and which signal positive change. Looking back over the last few years at Catholic Financial Life, I get the same feeling as I think of just some of the advancements we've made:

- Our Fraternal Data System to simplify chapter reporting and expedite the process to apply for member benefits
- Colorful postcards to announce chapter events
- A new funding model that rewards chapters for activity
- Expanded forms of member recognition at milestone years
- New member benefits for those with special needs, as well as our new Member Rewards Program
- More activities to engage young adult members and families
- Officer certification to ensure that our youngest members are protected

As our Society has initiated these changes, we have remained steadfast in our faith and fraternal mission. But we are also constant in our desire to provide things of value and meaning to our members in a contemporary manner. So over the next few years we will be working closely with you, our chapter leaders, as we evolve our fraternal expression.

Could we create affinity-based chapters around the country, comprised of members with like interests, or chapters for members of similar ages? Should we focus more on Action Teams, which allow small groups of members to sponsor a project? How would these groups be funded, and how would this affect representation at our Triennial Convention? These are just some of the questions we will be asking you for your input.

Scripture tells us, "Behold, I make all things new" (Rev. 21:5).

We are on the verge of an exciting time of renewal in our fraternal system, and you will have the opportunity to help us shape that future. May the Spirit bless us with wisdom and courage as we begin this endeavor together.

Fraternally,

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“All workshops and no play make for dull chapter leaders!”

True, it's not the most famous of quotes, but it does sum up the approach taken this year for the chapter leadership workshops. Though each workshop closed with a game called “Cash Value Cab” to reinforce the new material, serious topics were covered.

The workshops focused on new and updated information found in the *Chapter Policies and Procedures Manual*; unveiled enhanced membership recognition milestones; discussed the chapter of the future; and covered some dos and don'ts in managing a chapter Facebook site.



An additional goal of the workshops was to share the excitement of the Extraordinary Jubilee of Mercy, as proclaimed by Pope Francis. Held at designated pilgrimage sites for the Jubilee, each workshop contained a spiritual exercise which included the recitation of the Holy Rosary, passing through a Holy Door, and learning about the unique history of the wonderful religious sites found in Wisconsin and elsewhere in the country. Workshops were held in Milwaukee, Madison, Fond du Lac, Eau Claire, Green Bay, and La Crosse, as well as in Massachusetts.



To provide training to as many chapter officers as possible, a 90-minute webinar will be offered in mid-June for those living long distances from the workshop sites or unable to attend a session due to scheduling conflicts. Watch for an email with more details on the webinar. Contact Sally Krochalk, at sally.krochalk@catholicfinanciallife.org, if you wish to receive an invitation to the webinar and want to be sure we have your most current email address.

A fraternal benefit society is like a duck-billed platypus!



You've heard the expression, if it walks like a duck, looks like a duck, and lays eggs like a duck, it has to be a duck! Well, not always. The platypus, native to Australia, has a duck's bill, fur, web-feet, and strangely enough, lays eggs. It's officially a mammal because it feeds it's young with milk, like all mammals.

Fraternal benefit societies, like Catholic Financial Life, are a little like a platypus. Hard to classify. Hard to pigeonhole. First, we're different than commercial life insurance companies. Sure, we have great financial plans. Sure, we have professional agents, our advisors. Certainly we follow all the regulations that govern other life insurers. However, we are different. We are not-for-profit; support all-volunteer, member-led units, called chapters; share a common bond, our Catholic faith; and are governed by the democratic process.

The American Fraternal Alliance, our national trade association representing fraternal benefit societies like Catholic Financial Life, has created a brief but informative video explaining what fraternal are. To view the video, visit our website, www.catholicfinanciallife.org. It's a great way to introduce prospective members to Catholic Financial Life and to reinforce what makes us so special.

A little bit of this. A little bit of that. Combined together makes something truly unique. In the animal kingdom, it's the platypus. In the world of financial security, it's a fraternal benefit society. It's Catholic Financial Life.

Share Those Member Moments

“Member Moments” is a new program designed to showcase our members’ exceptional community involvement. Have you or another Catholic Financial Life member gone above and beyond the call of duty to support your community? If so, please share your story! We want to learn about how you give back, why you give back, what motivates you, and what impact your efforts have made.

Any submitted Member Moment may be shared via our *Member Magazine*, corporate website, and social media platforms. Moments can be submitted by logging on to: Join.catholicfinanciallife.org/membermoments
If possible, please include a digital image of yourself, or the member you are nominating, in action serving the community.

Please direct any questions you might have to: MemberMoments@CatholicFinancialLife.org
or call Vicki Vlach at (414) 278-6573.

Survey Questions:

- Please share, in detail, the exceptional community engagement you or another member has recently performed.
- Why do you give back to your community?
- What motivates you?
- What goals were you trying to achieve? Did you achieve them?
- Contact information: Name, Address, City, State, Zip Code, Email Address, Phone Number, Chapter Number

Help Us Make a “Hole in One” for Education!

The Catholic Financial Life Foundation provides funding for our high school and college scholarship program. This year, the Foundation is hosting a charity golf outing in September to raise funds for more scholarships. You can help us award more scholarships by making a monetary donation to the Foundation on behalf of your chapter. All chapters making a donation will be recognized on the back of this year’s Golf Outing Program. Please send your checks, payable to the “Catholic Financial Life Foundation,” to: Mary Opgenorth, Catholic Financial Life, 1100 West Wells Street, Milwaukee, WI 53233.



FLAG Members Begin New Term

2016 launched a new two-year term for members of the Fraternal Leaders Advisory Group (FLAG). The group met for the first time via teleconference in March, to discuss many of the topics presented in this issue of *Fraternal Leader*. Welcome to the 2016-17 members of FLAG!

Krystle Ballweg – Chapter 261, Cross Plains, Wis.
Tammy Gaszak – Chapter 40, Waukesha, Wis.
Phyllis John – Chapter 307, Eaton, Wis.
Jennifer Kaebisch – Chapter WI43, West Bend, Wis.
Michelle Mach – Chapter WI-04, Antigo, Wis.
Colleen McCormick – Chapter 88, Madison, Wis.
Yumari Ortiz – Chapter 110, Milwaukee Central, Wis.
Cheryl Parks – Chapter 887, San Antonio, Texas

Jeff Pedretti – Chapter 723, Southeastern Minnesota
Paul Plante – Chapter N042, North Attleboro, Mass.
Laura Shepard – Chapter 197, Seymour, Wis.
Tom Smagalski – Chapter 306, Milwaukee SE, Wis.
Jeanne Smoczyk – Chapter 160, Eau Claire, Wis.
Ken Tushaus, Chapter 318 – Mequon/Cedarburg, Wis.
April Vosters – Chap 271, Darboy, Wis.

Chapters Achieve Top Level



Under our new Chapter Funding Model, chapters have the ability to earn maximum funding in a given year by sponsoring a mix of at least 12 Educational, Civic, Religious, and Social activities in the previous year. Congratulations to these chapters that qualified for maximum funding in 2016!

<u>Chapter</u>	<u>Location</u>	<u>Chapter</u>	<u>Location</u>	<u>Chapter</u>	<u>Location</u>
6	Appleton, WI	200	LeRoy/Mayville, WI	MI-02	Bay City, MI
11	WI Rapids/Stevens Point, WI	212	Medford, WI	N042	No Attleboro, MA
19	Fond du Lac, WI	216	Milwaukee NW, WI	N091	Manchester, NH
33	Wausau, WI	223	St. Anna, WI	N149	Waterbury, CT
40	Waukesha, WI	261	Cross Plains, WI	N304	Waterbury, CT
80	Reedsville, WI	265	Auburndale, WI	N373	New Britain, CT
88	Madison, WI	266	New Holstein, WI	N413	Lewiston, ME
103	Hollandtown, WI	274	Rubicon, WI	N441	Westport, MA
110	Milwaukee Central, WI	299	Pulaski, WI	N442	Somerset, MA
113	St. Kilian, WI	306	Milwaukee SE, WI	N443	Hardwick, VT
118	Charlesburg, WI	307	Eaton, WI	WI-04	Antigo, WI
120	Watertown, WI	309	Marshfield, WI	WI-09	Chilton, WI
141	Jefferson, WI	310	Muscoda, WI	WI-18	Indian Creek/Tomah, WI
150	Neillsville, WI	317	Crivitz/Coleman, WI	WI-19	Rock River/Jefferson, WI
179	St. Cloud, WI	318	Mequon/Cedarburg, WI	WI-33	Plum City/Arkansaw, WI
180	Maplewood, WI	994	Conway, AR	WI-37	Stratford/Rozellville, WI
188	Shiocton/Greenville, WI	1010	Subiaco, AR	WI-48	Chippewa Falls, WI
194	Charlestown, WI	1038	Saint Louis, MO	WI-52	Milwaukee, WI
		1181	Jefferson City, MO		

Latest Updates to the Fraternal Data System



We're happy to announce that two updates have recently been made to the Fraternal Data System. The first update gives officers the ability to print a Detailed Chapter Activity Report upon demand. This report itemizes dollars spent and received on chapter activities, and helps facilitate the year-end financial audit conducted by chapter trustees. The second update, which came about due to a change in our accounting practices, is the requirement to enter an address for the recipient of a Match Fund check. Match Fund checks, however, will still be mailed to the secretary/treasurer of a chapter for presentation purposes. More updates are planned later this year, so watch for more information in future issues of *Fraternal Leader*.

Don't Lose Your Match Fund Dollars!

Chapters are required to submit their year-end financial reports in order to earn funding for the following year. This includes matching funds. Be sure to keep your activity reporting up to date, and submit your year-end reports on time, so that your chapter won't run the risk of being denied Match Fund dollars in the next year!

If you have any questions regarding topics in this newsletter, please contact:

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