

FRATERNAL LEADER



A Message from President and CEO Bill O'Toole and Senior Vice President John Borgen

Fall is a great time for reflection. We began the month of November by celebrating the Feasts of All Saints and All Souls, contemplating the path that each of us takes on our journey to the same Heavenly destination. We end the month by counting our many blessings and spending more time with those closest to us, while remembering those who are without the comforts we enjoy.

Giving back to the community is something our chapters do year-round. But in these next few months, many will also sponsor canned food drives or collections of hats, mittens, coats, and blankets for those in need. Others will put in extra volunteer time at a local homeless shelter or Society of St. Vincent de Paul (SVdP) meal program site to serve the poor and earn Match Fund dollars. Other chapters will support a local "Giving Tree," by purchasing and wrapping gifts for those less fortunate.

As you plan your final activities of 2019, we encourage you to review our funding model and the activity categories. We want every chapter to achieve maximum funding in 2020! If you're short an "educational" activity, consider partnering on a project with a local Catholic school. You might ask members of your chapter to bake and donate cookies or bars for a bake sale to benefit the school. Or perhaps you could arrange for a representative from SVdP to speak at a school assembly about the challenges facing the poor as winter approaches and how SVdP tries to meet those needs. If you require a "religious" activity, consider having a Mass offered for the living and deceased members of your chapter, with members of the chapter serving coffee and donuts to parishioners after Mass. These are just a few examples of simple activities that you can sponsor to qualify for greater funding next year.

Looking ahead to 2020, please note the dates of our chapter officer regional conferences as you plan your activities. The dates and locations are included in this issue of *Fraternal Leader*. We look forward to seeing many of you there as we seek your input helping to shape the future of our Society.

2020 definitely will be a busy year! But before 2019 comes to a close, we want to thank each of you for all that you do as a fraternal leader for Catholic Financial Life. This year we launched our "Angels Among Us" program, sending you two pins - one to keep and one to share with an "angel" in your community. We are thankful to have so many "angels" leading our chapters. We wish all of you peace and joy over the holidays. May God bless you as you continue to do good works helping others in the name of Catholic Financial Life.

Fraternally,

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Timothy Cardinal Dolan with President Bill O'Toole and Senior Vice President John Borgen at the 2018 Triennial Convention.

Simplify Reporting with the Fraternal Data System

In the coming months, many of our chapters will host fall dinners, member celebrations, and Christmas parties. This is also the year that all chapters should be holding officer elections. Not to mention all of the upcoming Match Fund activities. With all of these events comes the responsibility to submit forms: Match Fund applications, invitation requests, activity reports, and an updated officer list for the next two-year term. So how can you streamline your reporting to give yourself more time – time to enjoy the holidays? The easiest way is to use the Fraternal Data System (FDS).

The FDS eliminates the need to use paper forms to submit any of the items just mentioned. It all can be done online, by any primary officer (president, vice president, secretary/treasurer). Information entered into the FDS is also preserved for future reference, so the history of activities sponsored by your chapter can easily be referenced by yourself or a newly-elected primary officer.

Some of the other benefits of using the FDS include:

- Eliminating the need to enter redundant information on paper forms
- Receiving immediate confirmation when your Match Fund event is approved
- Creating your own chapter invitation and tracking the status of mailings on your “dashboard”
- Tabulating the amount of money spent and received for Chapter Activity Reports
- Updating your list of officers quickly, without the need to add contact information



Many of our chapter leaders already use the system, and have shared very positive feedback in regards to the amount of time it has saved them. One of the greatest benefits is the ease of completing the annual year-end financial report. If your chapter maintains its electronic checkbook in the FDS, and links entries to your activities for the year, you can generate your year-end financial report in a matter of minutes. The Detailed Chapter Activity Report can also be accessed at any time, to give your chapter a pulse on money spent/received per activity, and the number of activities conducted in the four required categories for funding.

So why not take advantage of this tool designed to improve your volunteer experience and increase your efficiency? As an added bonus, there is no need to send us duplicate paper forms if you submit your reports using the Fraternal Data System (just remember to click “Submit!”) And you’ll never have to worry about forms being lost in the mail on their way to us!

Jesus vs. Satan



Jesus and Satan were having an ongoing argument about who was better on his computer. God was tired of hearing all of the bickering and said, “I am going to set up a test that will run two hours and I will judge who does the better job.”

So Satan and Jesus sat down at the keyboards and typed away. They did spreadsheets. They wrote reports. They sent faxes. They sent e-mail. They did every known job.

But ten minutes before their time was up, lightning suddenly flashed across the sky and the electricity went off. Satan stared at his blank screen and screamed every known curse word. Jesus just sighed. The electricity finally flickered back on, and each of them restarted their computers.

Satan started searching frantically, screaming “It’s all gone! I lost everything when the power went out!”

Meanwhile, Jesus quietly started printing out all of his files from the past two hours. Satan observed this and became irate. “Wait! He cheated, how did he do it?”

God shrugged and said, “Jesus saves.”

Updates Made to Chapter Policies and Procedures Manual

In accordance with Chapter X, Section 35, of the Society's Bylaws, chapters are regulated, "through policies and procedures that the Board may from time to time adopt after soliciting and considering recommendations made by the Fraternal Leaders Advisory Group."

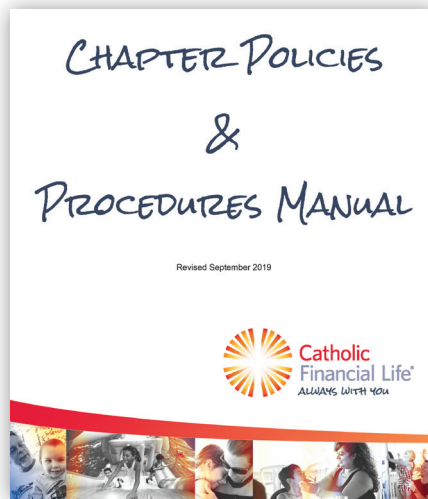
To that end, and as part of a periodic review of the Chapter Policies and Procedures Manual, the Fraternal Leaders Advisory Group (FLAG) recently reviewed proposed updates to the Manual. The following updates were recommended by FLAG and approved by the Board of Directors in September.

Section 3, Chapter Leadership, page 15 – Additional Information Concerning Chapter Officers:

Added: Former associates, advisors or brokers who were terminated by the Society, are not eligible to hold the position of chapter officer or to be elected a delegate or alternate to the Triennial Council.

Section 4, Chapter Operations, page 17 – Chapter Bank Accounts:

Current: All chapters must register basic account information with



the home office. This information must be kept current. The following information should be provided:

- Chapter Number and Location
- Checking Account Number
- Bank Name
- Address / City, State, Zip
- Phone Number
- Information on any other accounts

Added: Failure to provide the above information may result in a delay of chapter funding.

Section 4, Chapter Operations, page 17 – Chapter Spending.

Section 5, Chapter Activities, page 22 – Chapter in Good Standing and pages 24 & 25 – Outreach Programs: Deleted sections and references to Join Hands Day & Make a Difference Day.

The American Fraternal Alliance no longer promotes JOIN HANDS DAY and the Points of Light Foundation no longer promotes Make a Difference Day. Both appear to have ended their support of these programs after 2017.

Section 5, Chapter Activities, page 29 – Special Needs Chapter Program:

Added: Up to \$100 of the \$500 in Match Funds available to the chapter may be utilized to make a donation to an individual with special needs or a caregiver of someone with special needs.

The complete, updated version of the Chapter Policies and Procedures Manual is posted here:

<https://fds.catholicfinanciallife.org/Resources/ChapterResources/Policies-Procedures.htm>

Year-End Reminders

- Don't forget to submit your updated Officer Report for 2020-2021 either online, using the Fraternal Data System, or on paper. When using the Fraternal Data System, please do not change the start date for officers who are continuing on in their current position. Just update the date of their latest "re-election" to that position. Start dates are always January 1 and end dates are always December 31.
- Also be sure to monitor your Match Fund dollars as year-end approaches. Your chapter has the following Match Fund dollars available:
 - \$2,000 in "regular" Match Fund dollars – Up to \$1,000 may be matched on any one fundraiser or raised for a single organization in the calendar year.
 - \$500 in Match Fund dollars for an activity which raised funds for the Society of St. Vincent de Paul (SVdP) – or in service hours worked during the calendar year by chapter volunteers for SVdP.
 - \$500 in Match Fund dollars through our Special Needs Chapter Program to benefit an organization that serves those with special needs, an individual with special needs, or caregivers.
- And remember that events sponsored by your chapter should be reported in just one category. For instance, if you include a Mass before a member celebration brunch, the event may be classified as either "Religious," because the Mass is a significant part of the event, or as a "Social" activity. You should not report each as a separate event.

Honoring 25-, 50-, and 75-year Members at Chapter Events

Many of our chapters honor those achieving milestone membership anniversaries at a special "Member Celebration" event. Some chapters invite honorees to attend the event at no cost, and encourage them to bring a guest – sometimes also at no cost. It's really up to each chapter to decide how much it can afford to cover per honoree. If possible, a personal phone call should be made or a separate invitation sent to the honorees inviting them to attend the celebration in order to receive their milestone anniversary gift.

25-year members receive a specially-designed Catholic Financial Life ornament, 50-year members are honored with a gold rosary, and 75-year members are presented with a statue of the Blessed Virgin Mary. If an honoree wishes to receive the gift but is unable to attend the event, or another upcoming event, you have three options:

- Contact a Catholic Financial Life advisor and ask him/her to deliver the gift
- Arrange for a chapter leader (perhaps yourself) to deliver the gift
- Mail the gift to the honoree. Postage should be paid by the chapter.

If someone is due to be honored, but has expressed no interest in attending your event or receiving the gift, there is no need for you to automatically send the gift.

On a side note, a few years ago we received from our supplier a batch of rosaries that tarnished within a very short time. Over the last couple of years, the majority of those have been returned to us. All were sent back to the supplier and replaced at no cost to Catholic Financial Life. We'd like to put out one more call for all chapters to inspect any rosaries they may still have on hand, and return to us any that were part of the batch that tarnished so quickly. Our supplier has secured a different manufacturer, and we should no longer have this issue. We apologize for any inconvenience this has caused.



Stay in Touch

The quickest way to communicate information to our chapter leaders is electronically – particularly via email. We often share time-sensitive updates that require a quick response. And the monthly Member Engagement Blog is only available in electronic format. So that we may keep you in the loop and communicate more regularly with our chapter leaders, we need your current email address.

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

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2020 Regional Chapter Leader Conferences

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| March 28-29 | New England (Marlborough, Mass.) |
| April 18-19 | Green Bay, Wis. |
| May 2-3 | Wisconsin Dells, Wis. |
| June 13-14 | Milwaukee, Wis. |



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