

FRATERNAL LEADER



A Message from our Convention Co-Chairs, President & CEO Bill O'Toole and Sr. Vice President John Borgen

Dear Chapter Leader,

It is inspiring and exciting bringing together a group of close to 700 dedicated members, and sharing with them the good news of our Society and our plans for the future. With sincere gratitude we want to thank all of the delegates and guests who joined us for our 2015 Catholic Financial Life Triennial Convention here in Milwaukee.

At the Convention, we elected those who will serve on our Board of Directors for the next three years, updated our bylaws, shared our faith at Mass, "broke bread" together at multiple meals, celebrated "All-American Night," and were educated, inspired, and entertained by the speakers and performers who joined us on Friday and Saturday. We also helped raise more than \$25,000 for the Society of St. Vincent de Paul at the Friends of the Poor Walk/Run on the campus of Marquette University, which was the kick-off to our Convention weekend. The comments we've received verbally, and those written in the Convention surveys, show that our delegates found the Convention to be both fun and informative. (Please see page 2 for some of the survey results — and don't miss our Convention photo collage on pages 3 and 4!)

Catholic Financial Life members were well represented by the individuals elected to serve as delegates to the Convention. Those of you who may not have had the opportunity to serve as a delegate still played an important role in this process by participating in the election of delegates and alternates conducted by your local chapter. Great job! And special thanks to those who served on any of the committees which provided oversight and input to many aspects of the Convention — ranging from the certification of delegates to reviewing the qualifications of candidates to the Board of Directors.

Over the next several months, we'll share more about our Convention and the plans announced there in our *Member Magazine* and here in *Fraternal Leader*. In addition to Convention news, this issue of the newsletter also contains the latest from our Fraternal Leaders Advisory Group (FLAG), an announcement about recognition we've recently received for one of our member benefits, and some helpful tips for planning successful events.

At this time of year, we celebrate the harvest and gather together to thank the Lord for the many blessings we have received. All of us at Catholic Financial Life are very grateful for the many dedicated volunteers who lead our chapters — all of you! May the Lord bless each of you and your families abundantly in the coming months!

Fraternally,

William R. O'Toole
President and CEO
(414) 278-6700
bill.otoole@catholicfinanciallife.org

John T. Borgen
Senior Vice President
(414) 278-6608
john.borgen@catholicfinanciallife.org

Survey Says...

Delegates to the Triennial Convention were asked to complete a survey providing us with valuable feedback on various aspects of their overall Convention experience. They rated such things as ease of travel, quality of food and lodging, speakers and entertainers, and activities and programs such as the Friends of the Poor Walk/Run, All-American Night, and the business session. More than 225 surveys were returned and tabulated, and we're happy to report that the feedback has been overwhelmingly positive! In all areas, the Convention received between 95% and 99% positive ratings.

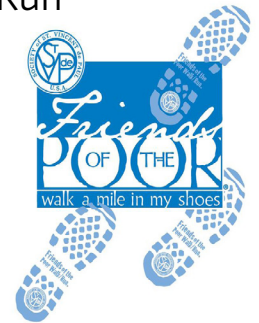
Two of the weekend's highlights for our delegates were Friday's Society of St. Vincent de Paul Friends of the Poor Walk/Run and the Servant of the Poor Awards presented later that evening. The ease of registration, the content and coordination of the business session, the speakers and entertainers, the transportation provided (shuttles/wheelchairs), overnight accommodations, and meals all received high marks from delegates. It takes months of planning and a crew of people to arrange all of the details involved with the Convention. We're happy that our delegates and guests had such a positive experience!

**Overall Convention
Experience Rated
97.24 Positive!**



SVdP Friends of the Poor Walk/Run
Milwaukee, Wisconsin
September 25, 2015

- Nearly 400 Participants
- More than \$25,000 Raised



Summary of Fraternal Leaders Advisory Group (FLAG) Meeting

On Friday, September 25, members of FLAG met briefly prior to the Triennial Convention. Joe Gadbois welcomed the committee members and their guests and highlighted the key activities being held over the weekend. Sally Krochalk, Mary Opgenorth, and Jim Love, normally present at FLAG meetings, were elsewhere, tending to other convention duties.

Several members completed their term on FLAG at this meeting.

Pictured with their award for years of service on FLAG are:

Rita Brey, Chapter 253, Plain, Wis.; Jo Cook, Chapter 137, La Crosse, Wis.; Heidi Lenski, Chapter 216, Milwaukee NW, Wis.; Bruce Bultman, Chapter WI152, Milwaukee, Wis.; and Debra Van Bogaert, Chapter WI15, Glen Haven, Wis. Not pictured is Ann Wallander, Chapter 225, Mishicot, Wis.



2015 Catholic Financial Life Triennial Convention

Memories



9 million
fraternal volunteers
engaged in
community service



Chapter Reporting Gets Easier!

We're always looking for ways to provide our volunteers with easier, quicker, and more efficient ways to complete the required "paperwork" for their chapter. One of the most popular features of the Fraternal Data System has been the ability to generate the Year-end Financial Report at the touch of a button. And the enhancement that was added last year to the online check register has reduced the need to calculate expenses and receipts for individual chapter activities.

Our next enhancement to the Fraternal Data System will be the option to print a Detailed Chapter Activity Report upon demand. This report is typically sent to chapters at mid-year and year-end, providing financial figures that are utilized in the Year-end Financial Report. It also offers chapters a breakdown of activities by category. So your chapter will now be able to easily determine what categories you have satisfied and those in which you may want to plan an activity to achieve a higher level of funding. Watch for more information on this latest enhancement when it goes live at the end of this year!

Recent Changes Made to Match Fund Checks

Our chapter secretary/treasurers may have noticed a change in the way Match Fund checks are now generated by the home office. In the past, checks were allowed to be issued simply with the name of the organization for which you raised funds, such as "St. Anthony's Parish." Some changes have been made to our Accounting software, which now requires us to provide an address for every check requested. Currently, there is no spot to include the address on any of our paper/electronic forms. That will be changing in the future, and will be one of the upcoming modifications to the Fraternal Data System. In the meantime, we have been issuing checks using the Catholic Financial Life home office address as a default. **Since we would prefer to use the actual address of the organization for which you raised funds, please include this information in the event details on all Activity Reports for Match Fund events,** until we can update the forms to include a specific spot to enter that information. Thanks for your cooperation.

Tips for Planning More Successful Chapter Events

One of the most frequently asked questions of the Fraternal Department is, "How do we attract more members to our events?" Though there is no secret formula to success, and there are more demands on family time than ever before, here are a few helpful hints that could boost your attendance:

1. Be sure not to schedule anything opposite a major sporting event (e.g. Packers or Patriots football games)
2. Start your weekday event after working people have had a chance to leave work and check home first (6:30 p.m.)
3. Include Saturday evening or Sunday Mass before your event — helps it count as a religious activity towards chapter funding
4. Hold joint events with other area chapters, especially Member Celebrations
5. Alternate activities every other year to keep it fresh
6. Keep the price of family events and dinners affordable
7. Ask your children and grandchildren what might interest them
8. Tie in your event with another group such as the Scouts, or with a major local event.

Third Step in Officer Certification Process Implemented

Our children and grandchildren are our future and we should do all we can to protect them. With that in mind and in keeping with the guidelines set forth by the United States Conference of Catholic Bishops, the Society embarked on a multi-year, three-step program to bring our chapter leaders into compliance with the program "Protecting God's Children", also known as VIRTUS.

Step One was The Fraternal Leader Code of Conduct, developed in 2013 with input from our Fraternal Leaders Advisory Group. Step Two was the onsite VIRTUS training provided at our 2014 regional meetings, as well as online training for individuals not in attendance. The third and final step in the certification process will conclude this year with official criminal background checks of all chapter leaders.

The Home Office will follow the same guidelines as those mandated for all dioceses, in that background checks are required from an outside source. The purpose of this is not to question the integrity of our leaders. It is required by parishes, schools, youth groups, and many other volunteer organizations.

All chapter officers will receive background check authorization forms in the mail. **These must be completed and returned to the Home Office by December 1, 2015.** There is no charge to chapters to complete this. Catholic Financial Life will cover the entire cost of the background checks.

Orphan's Scholarship Makes National Top 50 List

Catholic Financial Life was honored to have our Orphan's College Scholarship chosen as #47 on the "50 Top College Scholarships" list sponsored by College Choice, an independent online publication dedicated to helping students and their families find the right college. To learn more about our Orphan Income and Scholarship program, visit our website and click the link to Financial Member Benefits:

<http://www.catholicfinanciallife.org/Membership/FinancialMembership.htm>

Scholarship applications for the 2016-17 school year are now being accepted for Catholic Grade School, Catholic High School, and College. Log in to Account Access at the top of our home page to apply, or look for the application under Financial Member Benefits/Scholarship Programs. **Deadline to apply is March 31, 2016.**

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

Sally Krochalk, Editor, *Fraternal Leader*
sally.krochalk@catholicfinanciallife.org



1100 West Wells Street
Milwaukee, WI 53233
(800) 927-2547 | (414) 273-6266

catholicfinanciallife.org