

# Working Together For Change

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## Report Back

NFCA Fraternal & Communications Section  
Mid-Year Meeting  
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## Workshop goals

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As a diverse group of fraternalists, we are very good at acknowledging our differences. Given our changing times, we are also very good at articulating our challenges. This session reversed all of that.

The workshop conducted by Daphne Woolf, Managing Partner of The Collin Baer Group focused on what we, as fraternalists, have in common and where our opportunities lie. Break-out groups brainstormed to come up with ideas on how we can work better together so that we can grow and be vibrant sustainable benevolent associations. They also identified needs and potential obstacles to making their ideas happen.

## Our similarities

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- We have similar product offerings.
- We all have the same 3 basic mandates:
  1. Grow and retain your members.
  2. Sell insurance to remain financially viable.
  3. Engage members in your fraternal activities.
- We all have a common interest:

***Sincere care and concern for the growth, vibrancy and sustainability of your own and other fraternalists.***

- We all want to:
  - ignite the volunteer spirit
  - reach out to youth
  - engage your current members into action
  - make your branding visible and effective

## Our opportunities

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<i>Business environment</i>	Corporate Social Responsibility (CSR) is the “in” thing.	* Joint sponsorship
<i>Educational trends</i>	Community involvement and outreach is being incorporated into most school curriculums.	* Youth
<i>Personal needs</i>	People (young people in particular) enjoy having a purpose: volunteerism is “cool.”	* Action
<i>Social networking</i>	With increasing technology such as Facebook, MySpace and Twitter, people are looking for venues to secure social connections.	* Engagement
<i>Your offerings</i>	Your products have an appeal (particularly in tough economic times) because of low face amounts.	* Revenue

We have a choice...

- We can focus on the challenges facing our organizations.
- OR
- We can look at our opportunities and collectively say: “The time is right for us to shake things up. Let’s do things differently.”

It doesn’t matter which fraternal you are with.

It doesn’t matter what specific role you have.

It doesn’t matter whether your fraternal is big or small.

We can...

- Put all of our differences behind us.
- View ourselves as having one common mission:

***How can we collaborate to create for each other, growing, vibrant and sustainable fraternal associations?***

- Remember our similarities.
- Focus on our opportunities.
- Take a real “can-do” attitude.
- Stretch beyond our limits.

## Examples of working better together

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### 1. *OUTSOURCING (different lodges)*

Fraternal A outsourced their insurance underwriting and administration to Fraternal B.  
*OUTCOME:* For Fraternal A, reduced expenses. For Fraternal B, increased revenue.

### 2. *JOINT SPONSORSHIP (multiple ethnic)*

Three fraternal teams teamed up to co-sponsor a national charitable event. This created critical mass. They organized the event together and had large attendance at the event, which attracted the press.

*OUTCOME:* The increased profile led to successful membership drives for all 3 fraternal teams.

### 3. *SHARED SALES FORCE (religious and ethnic)*

Two fraternal teams merged their sales distribution networks. They modified products to reduce duplication. The merged sales force promoted the products of both fraternal teams simultaneously.

*OUTCOME:* Only one sales force (instead of two) required support, and this support was provided from two (instead of one) fraternal teams, reducing expenses while resources expanded. Both fraternal teams also sold more memberships and insurance.

### 4. *SHARED ADVERTISING CAMPAIGN (open)*

Four fraternal teams collaborated to place joint ads in newspapers and magazines.

*OUTCOME:* Depending on the advertisement, greater impact and publicity at a reduced cost.

# Your ideas for working better together

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## 1. Business environment

### *Structured Use Of Technology for Fraternal Outreach*

- Have designated times when the blog is up and running so that, when people ask a question, someone is at the other end to provide a response.
- Set up electronic meetings, webinars.
- Create a site to share ideas with each other on how to promote insurance to members, engage them in activities, run successful events, etc.
- Include structure to the interaction to facilitate internal networking.
- Ensure our networking site (chat line) is audited regularly to ensure people get a response when they post a question on the site.

### *Structured Use Of Technology for Member Outreach*

- Conduct webinars for members to to share valuable and useful information with them.
- Some of that information could target youth interests.
- Offer information on how to write a resumé or do a job interview.

### *Team-Up To Capitalize On Each Other's Strengths (e.g., IT capability)*

- Learn from each other, and build on each others' success.
- Identify who is really good at what, and then outsource to each other appropriately.

### *Joint Training*

- Have lodges/fraternals come together to jointly sponsor speakers and training.
- This would allow us to not only share speaker costs, but also get broader access to training. Members would learn together to enrich the experience.

## 2. Educational trends

### *Joint Public Relations Campaign*

- Get the message out about fraternalism: a united message presented in a united front.
- This could be run nationally or locally.
- Develop a strategy on how it would work.

#### *Joint Venture in Education*

- Create lesson plans for youth and parents that would tie-in fraternal activity.
- Connect with other school initiatives: Black History, Earth Day, etc.
- Create resources for teachers.

#### *Campus Partnerships*

- Close the gap between youth and adults by capturing the university contingent.
- Conduct a pilot at one university, and then roll it out to others.

#### *Educate Students on Volunteerism*

- Create a school curriculum — “Youth-in-Action” — and distribute it to all schools.
- Design as a 2-part turn-key curriculum:
  1. Classroom component to learn about volunteerism.
  2. Volunteerism in action, through which students earn required volunteer hours.

### 3. Personal needs

#### *Harness the Volunteer Power and Dollars of Baby Boomers*

- Target a specific demographic: baby boomers.
- Consider what is required to recruit and engage this particular group.
- Many of them are now empty nesters and have the time, money and will to volunteer.

### 4. Social networking

#### *National Volunteer Partnership*

- Fraternal would pick 3 national causes or charities to focus on each year, to make a bigger impact.

#### *Own A Joint Cause*

- When fraternal come together, the outcome is always greater.
- Identify a brand new cause that fraternal would collectively own. We could undertake a competition to choose a joint cause.
- All fraternal would tie in to this joint cause/charity.
- Make sure fraternal get profile and recognition.
- Implement the cause regionally/geographically (e.g., youth-related).
- Advocacy projects could now be large scale, involving State Congress, etc.

### *Create a NEW Fraternal*

- Come together under a new banner, *Family First Fraternal*, to embrace the family on a nationwide basis.
- Have national partnerships with other organizations that connect with our focus on family.
- Offer a unique range of products to our members to support our financial strength.
- Ask our members what partnerships/charities they would like us to support.
- Have the sales force be knowledgeable about both our products and fraternal activities, and bring their own families to our events.

## 5. Your offerings

### *Joint Fraternal Benefits*

- Develop a consolidated package of benefits that all fraternal could sell to their respective members, to avoid the current product overlap.
- This package would accommodate the different members and target markets to whom it would be offered. It would also reflect what we provide versus what we sell.

### *Fraternal Benefit Reciprocity*

- Offer members of ANY society, the benefits of their own society PLUS the benefits or perks of the collective fraternal community; specific benefits to be determined.
- Example: members' children could be eligible for additional education/tuition support.

## What we need to make these ideas happen

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- NFCA needs to prioritize and action these ideas to keep things moving between now and next year's meeting — the NFCA is needed to move some of these ideas forward.
- NFCA needs to serve as an aggregator and a champion of joint initiatives so that individual fraternal don't go back to "same old, same old."
- NFCA support, co-ordination and communication.
- NFCA as a resource.
- A clean slate.
- "Break the mold" of old fraternalism.
- Stop viewing each other as competitors.
- Learn to share our strengths and ask for help.
- Working together to solve our problems. Looking at our combined synergies and strengths will certainly make a difference.
- Remembering to think "outside the box".
- Keep our common goals and mutual benefit in mind, as well as the concept of becoming stronger, more powerful through synergy.
- Mutual agreement on what would work collectively and how it would work collectively.
- How to share the cost of implementation.
- How to administer joint benefits.
- How to give visibility/their share of their profile to all participating fraternal in a joint event/activity.
- Get school boards on board to our ideas for students (not likely a problem; they have historically been very receptive).
- Revisit previous collaboration methods through standing committees of NFCA Societies, to plan initiatives that were distributed to all Societies to use in annual programming.
- There's value in brainstorming — there is power in numbers with all of us discussing new ideas. Always a good idea to have fraternal share ideas with one another.

## Potential obstacles

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- Lack of follow-up on ideas.
- Never get to implementation.
- Fraternal buy-in.
- Buy-in from Senior Management. Senior/C-suite support is critical or it will go nowhere.
- Alignment between our current goals and targets with this new direction.
- Calculating the return on investment.
- Managing the complexity of implementation, given different business rules among the fraternal.
- Logistics and scheduling such as: Who owns the event? Who would run it? Who would organize it? How do we engage busy members and their families in events?
- Political/control battles — people used to doing things their own way.
- How to differentiate individual fraternal offerings/activities from the collective offering.
- The perception that there is competition among the fraternal.
- How to get agreement.
- How to jointly agree on a charity to partner with/support.
- How to bring lodges together for joint events.
- Databanks and information sharing is only as good as the contributors.
- It will be difficult to make any of this actionable. More focus was given to being nice and doing things nationwide, versus making this a viable business model for individual societies.

## Next steps

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- Each participant to share the information in this report with fraternal colleagues and management.
- Leaders of the NFCA Fraternal & Communications Section to embark on further discussion with the NFCA on how to prioritize and then champion some of these ideas into action. Possibly convene a task team to take this on.