



# Working together for change

**National Fraternal Congress of America**

NFCA Fraternal & Communications Section  
MID-YEAR MEETING  
18 April 2009



THE COLLIN BAER GROUP

# Today's goals

---

1. **Share some facts.**
2. Identify our synergies.
3. Capitalize on our opportunities.
4. Discuss how we can work better together.

## Some facts

---

- 83 fraternal organizations across the US
- some large, some small
- underwrite life insurance and annuities
- only members can access insurance
- tax exemption intact

## Fraternal affiliation:

- religious (such as Roman Catholic)
- ethnic (like Czech-Slavic, Norwegian, Polish)
- open (like patriotic lines or family values)

1. Share some facts.
2. **Identify our synergies.**
3. Capitalize on our opportunities.
4. Discuss how we can work better together.

# Our synergies

---

Similar product offerings

Same 3 mandates:

1. Grow and retain your members.
2. Sell insurance to remain financially viable.
3. Engage members in your fraternal activities.

And in this room...

...each of you has a distinct role:

- public relations and promotion
- marketing and advertising
- membership
- business-related
- fraternal-related

But what all of you have in common is...

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

Because of this...

All of you want to:

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

1. Share some facts.
2. Identify our synergies.
- 3. Capitalize on our opportunities.**
4. Discuss how we can work better together.

# Our opportunities

---

business environment

educational trends

personal needs

social networking

your offerings

**BUSINESS  
ENVIRONMENT**

Corporate Social Responsibility (CSR) is the “in” thing.

**JOINT  
SPONSORSHIP**

**EDUCATIONAL  
TRENDS**

Community involvement and outreach is being incorporated into most school curriculums.

**YOUTH**

**PERSONAL  
NEEDS**

People (young people in particular) enjoy having a purpose: volunteerism is “cool.”

**ACTION**

**SOCIAL  
NETWORKING**

With increasing technology such as Facebook, Myspace and Twitter, people are looking for venues to secure social connections.

**ENGAGEMENT**

**YOUR  
OFFERINGS**

Your products have an appeal (particularly in tough economic times) because of low face amounts.

**REVENUE**

You have a choice.

You can focus on the challenges  
facing your organizations...

**OR**

You can look at your opportunities  
and collectively say: the time is  
right for us to shake things up.  
Let's do things differently.

1. Share some facts.
2. Identify our synergies.
3. Capitalize on our opportunities.
4. **Discuss how we can work better together.**

# Working together

---

For the next hour:

Put all of our differences behind us.

View ourselves as having one common mission:

**OUR COMMON MISSION TODAY IS:**

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

It doesn't matter which fraternal you are with.  
It doesn't matter what specific role you have.  
It doesn't matter whether you are big or small.  
Remember your synergies.  
Focus on your opportunities.

Here are 4 examples of how other fraternalists have collaborated.

**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.

**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.

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

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

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

**SHARED ADVERTISING CAMPAIGN (open)**

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

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

Let's have some fun!

1. Select a colored strip from the centre of your table.
2. Move to the table where your strip of paper matches the color of the balloon.
3. This is your break-out group.

Together, come up with 3 ideas on how you can help each other create growing, vibrant, and sustainable fraternal associations.

For each idea, ask yourself:

- what do we need to make this happen?
- What are the potential obstacles to overcome?

### **REMINDER**

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

You have **30 minutes** to come up with **3 ideas**.

***GO!***

## Next steps

---

**AFTER TODAY**

Share with your colleagues and your leadership group what you learned today!

**MAY**

Your feedback will be documented and sent to you.

**SEPTEMBER**

At the annual meeting in Texas, *potentially* this topic will be discussed further.

Thank you for participating!

Any questions?

Please complete the evaluation form.



*Thank you!*