

WFC/WFIC Annual Meeting “Survival in the Fraternal Jungle” —Strategies for Success in a Changing and Challenging Marketplace

“Survival in the Fraternal Jungle” was the theme of the joint annual convention of the Wisconsin Fraternal Congress (WFC) and the Wisconsin Fraternal Insurance Counsellors (WFIC) held Oct. 9-10 in Wisconsin Dells, Wis. More than 220 fraternal and insurance leaders from around the state participated in the convention.

The “survival” theme was chosen this year to reflect the remarkable changes and challenges facing fraternalists today. The program introduction read: “With competition for both our members’ volunteer time and insurance dollars growing dramatically, it is increasingly difficult not only to thrive but also to survive. The goal of this meeting was to focus on ways fraternal organizations can create effective volunteer programs and financial strategies to meet these volatile times.”

Highlights of the meeting included a visit by Wisconsin State Insurance Commissioner Jorge Gomez, who spoke about the great impact insurance companies have on the state. “Wisconsin is one of the top five states in the nation in which the insurance industry is an important part of the economy,” said Gomez. “This is reflected in the large number of insurers with national headquarters in the state. With six domiciled fraternal benefit societies based right here, the significant role played by fraternal benefit societies is unquestioned.”

Wisconsin State Sen. Dale Schultz (R-Richland Center) provided insights on how fraternal organizations can work more effectively at the local level with their state legislators. A panel discussion involving NFCA President and CEO Fred Grubbe, Thrivent Financial for Lutherans Divisional Fraternal Director Rick Stach,



NFCA President Fred Grubbe, Thrivent Financial for Lutherans Divisional Fraternal Director Rick Stach, and Catholic Family Life President and CEO Dan Lloyd.

and Catholic Family Life Insurance President and CEO Dan Lloyd addressed the issue of how to ensure that fraternal efforts and “the bottom line” can co-exist in today’s world.

Other insurance “survival” opportunities included continuing education programs that focused on long-term care, estate protection strategies and Title 19 updates. In addition, one of North America’s leading insurance and financial advisors, Wayne Cotton, CLU, presented tips on how to be more productive in that field.

For leaders of fraternal programs, there were sessions that dealt with creating valuable programs on a limited budget, developing effective partnerships with youth to increase volunteer efforts, developing effective employee volunteer programs, and building awareness of an organization’s “fraternal” brand.

It's Hard to Say No to Your Friends, Senator Tells Convention

By Legislative Counsel Bill McClenahan, Martin Schreiber & Associates

"It's hardest to say no to the people you are closest to," Senator Dale Schultz told Wisconsin Fraternal Congress members at the annual convention in October. "It's hard to say no to your friends." Sen. Schultz (R-Richland Center) said this fact makes it important for fraternalists to develop relationships and friendships with state legislators and other officials.

But the senator offered another explanation of why he authored a bill designed to boost fraternal volunteerism (see related story). "It's because of those bears," he said, pointing at teddy bears waiting to be given to people with needs due to poverty, illness or grief. Fraternal lodges and chapters distribute the bears, which are donated by Boyds Bears and Stuffed Animal Ministries.



The senator said that people in his district got him involved in the bear effort, which he said provides a sense of community to people when they need it most. He congratulated fraternalists for the growth in the program.

That experience, he said, made him appreciate what was at stake when lobbyists and members of the WFC Legislative Committee asked him to author Assembly Bill 329, designed to boost volunteer time by reducing the time spent at local lodge business meetings.

The senator said he was excited to help quickly pass the bill because he knew firsthand the kinds of services that fraternal volunteers provide. Statistics about fraternalists providing Wisconsin with 5 million volunteer hours worth \$76 million each year are impressive, he said. But lawmakers really understand those kinds of impacts when someone takes them by the hand to show them efforts like the bear program.

That's the reason, Senator Schultz said, that fraternal

lodges and chapters should invite legislators to come to and participate in their local volunteer activities. "Inviting people to share in your personal life is a powerful motivator," he said. Legislators are most likely to return the phone calls and work on behalf of people they know.

Governor Signs Lodge Meetings Bill into Law

By Legislative Counsel Marty Schreiber

Local lodges and chapters of Wisconsin-based fraternalists can reduce the number of business meetings under a new law signed by Governor Jim Doyle on October 16, 2003. (Fraternal bylaws may need to be changed to take advantage of the change, however.)

"Like most Wisconsin citizens, fraternal volunteers lead busy lives, and the current monthly business meeting requirement often acts as a deterrent to volunteerism," Governor Doyle said. "Volunteers have to juggle work, their children and other commitments to find time for often tedious business meetings. That's why I'm signing AB 329 today," the Governor added. "It will make it easier for Wisconsin's fraternal volunteers to spend less time in long meetings and more time out in their communities."

Assembly Bill 329 (now Act 60) reduces the number of required business meetings for local lodges to one every three months instead of one per month for 2,500 local lodges in Wisconsin. Fewer meetings will help recruit more volunteers and commit more hours to volunteer action in their communities. A number of lawmakers deserve thanks for quickly shepherding this bill through the Legislature this session. The bill passed on voice votes in both the Assembly and Senate. Rep. Phil Montgomery (R-Ashwaubenon) authored the bill

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Fraternalists help those who help families

Teddy bears, books and cleaning supplies. What do they have in common? Well, they were all part of two service projects conducted during the WFC/WFIC joint annual convention. While the attendees—fraternal and insurance leaders—were at the Kalahari Resort and Conference Center to conduct association business, attend educational workshops and network, they also liked to “walk the talk” by extending their practice of fraternal outreach and volunteerism to benefit a not-for-profit organization in the community hosting the convention.

The two recipients of this year’s fraternal service projects were:

- Kids’ Ranch, a grassroots organization in the Wisconsin Dells area created to help children develop respect for themselves, for others and for the environment. The program focuses on literacy and helping children face life challenges without the use of violence or drugs.
- Hope House, a Baraboo area program that provides shelter, advocacy and education to people affected by domestic violence and sexual assault.

More than 220 WFC/WFIC annual meeting attendees supported Hope House by bringing donated household cleaning and personal care items to the meeting. In

addition, the organization received \$350 raised from a book fair conducted during the two-day meeting. The WFC later voted to increase the total gift to \$500.



The Kid’s Ranch received a total of \$1,000 (including funds matched by the WFIC coffers) during a raffle conducted at the annual meeting. In addition, meeting attendees packaged more than 750 teddy bears for children at the ranch. The teddy bear project is the result of a cooperative effort involving the Wisconsin Fraternal Congress, Boyds Bears of Pennsylvania, Stuffed Animal Ministry of Minnesota, and Corp Care Distributions, Inc., which is based in Milwaukee. “As leaders in our fraternal societies, we work every day with the members of our own organizations to find ways to help people and organizations in their local communities,” said Joe Gadbois, outgoing WFC President. “We appreciate the opportunity to extend that same spirit of fraternal commitment and volunteerism to our convention’s host community.”

Lodge Meetings - Continued

with Sen. Dale Schultz (R-Richland Center). Rep. Bonnie Ladwig and Sen. Schultz held this session’s hearings and committee votes.

Cosponsors included Representatives Karl Van Roy (R-Green Bay), Steve Wieckert (R-Appleton), Scott Jensen (R-Waukesha), Garey Bies (R-Sister Bay), Jeffrey Wood (R-Chippewa Falls), Michael Lehman (R-Hartford), Becky Weber (R-Green Bay), Debi Towns (R-Janesville), Dan Schooff (D-Beloit), Glenn Grothman (R-West Bend), David Cullen (D-Milwaukee), Carol Owens (R-Oshkosh), J.A. Hines (R-Oxford), Terri McCormick (R-Appleton), Joe Plouff (D-Menomonie), Jennifer Shilling (D-La

Crosse), Curt Gielow (R-Mequon), Jeff Stone (R-Greendale) and Lorraine Seratti (R-Florence), along with Senator Dave Hansen (D-Green Bay).

Rep. Gregg Underheim (R-Oshkosh) drafted the bill last session and held a hearing on it. Rep. Phil Montgomery authored the bill last session. Sen. Roger Breske (D-Eland) was the Senate author of the bill and held a hearing. And Rep. Dean Kaufert (R-Neenah) offered the provision as an amendment to last session’s budget repair bill.

Please thank these legislators and the governor for their help and support.

2003-2004 WFC Slate of Officers

The Wisconsin Fraternal Congress (WFC) has announced the installation of its 2003-2004 officers. The following WFC officers were elected and installed:

- President: Barbara Wolf,
Thrivent Financial for Lutherans
- Vice President: Joseph Kuzma,
Western Fraternal Life Association
- Secretary-Treasury: Gene Schindler,
Catholic Order of Foresters
- Immediate Past President,
Joseph Gadbois,
Catholic Family Life Insurance
- Past President: George Reckin,
Equitable Reserve Association
- Corresponding Secretary: Marsha
Mahan,
Thrivent Financial for Lutherans
- Directors: Lee Berg, Catholic Knights;
Karen Coonen, Thrivent Financial for Lutherans;
Kim Ingram, Catholic Family Life Insurance;
Elaine Nap, Employees' Mutual Benefit Association;
Anne Rogers, National Mutual Benefit

All terms are one-year terms. New officers will be elected and installed at the WFC/WFIC joint annual convention in fall of 2004.

The Wisconsin Fraternal Congress is the trade association representing 31 fraternal benefit societies operating in the state. More than 350,000 state residents belong to these societies. Six of the societies (Catholic Family Life Insurance, Catholic Knights, Employees' Mutual Benefit Association, Equitable Reserve Association, National Mutual Benefit and Thrivent Financial for Lutherans) are domiciled in the state of Wisconsin.



Back Row (left to right): Joe Gadbois, Marsha Mahan, Anne Rogers, Joe Kuzma, Lee Berg, Karen Coonen, Legislative Chair Brian Casey. Front Row (left to right): Elaine Nap, Kim Ingram, Barb Wolf, Gene Schindler.

Wisconsin Fraternal **Connection**

is a quarterly publication. We welcome all submissions including successful lodge and branch projects.

Photos will also be considered for publication. Society news and FIC news can be submitted.

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