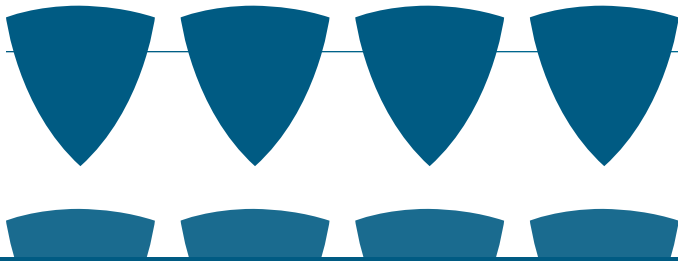




# FRATERNAL REINVENTION RESEARCH

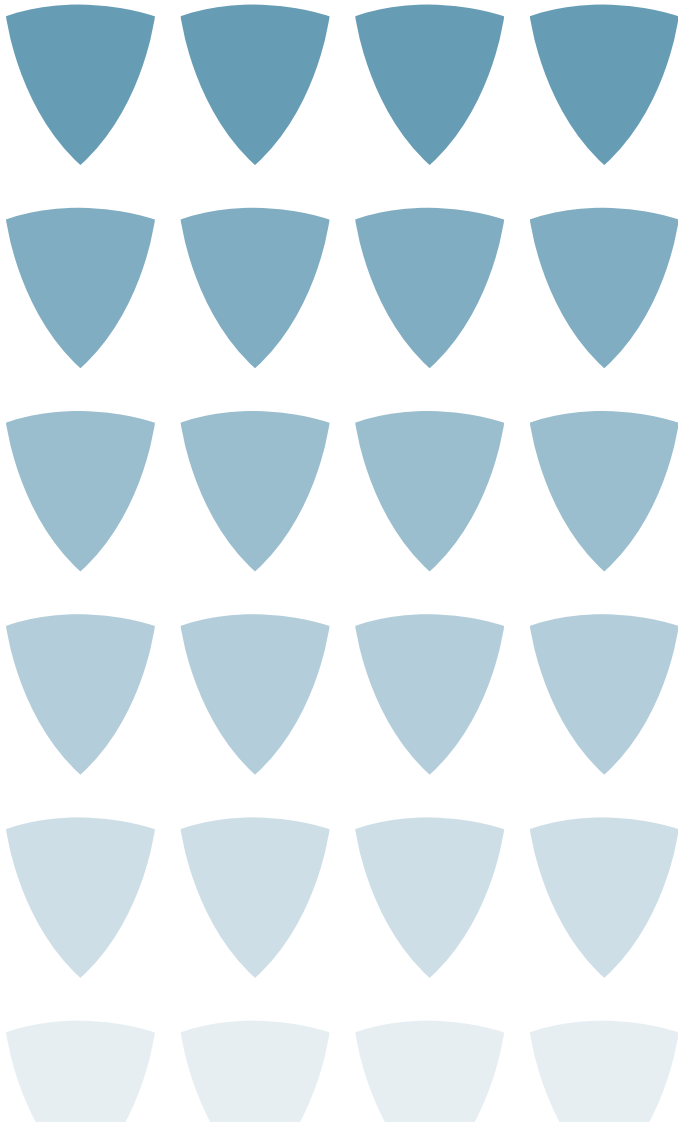


## BACKGROUND

Modern Woodmen of America's Fraternal Department conducted extensive qualitative and quantitative research from May to October 2023 to support key initiatives aimed at:

- Growing membership.
- Creating effective member touch points.
- Developing a new chapter model that better serves all stakeholders, particularly young member families.

This research is pivotal to ensure the Fraternal Department's strategies align with the needs and aspirations of field representatives, fraternal leaders and members.



## RESEARCH METHODOLOGY

**Primary data sources:** 40 in-depth interviews, five online bulletin boards with 143 participants, and extensive secondary research.

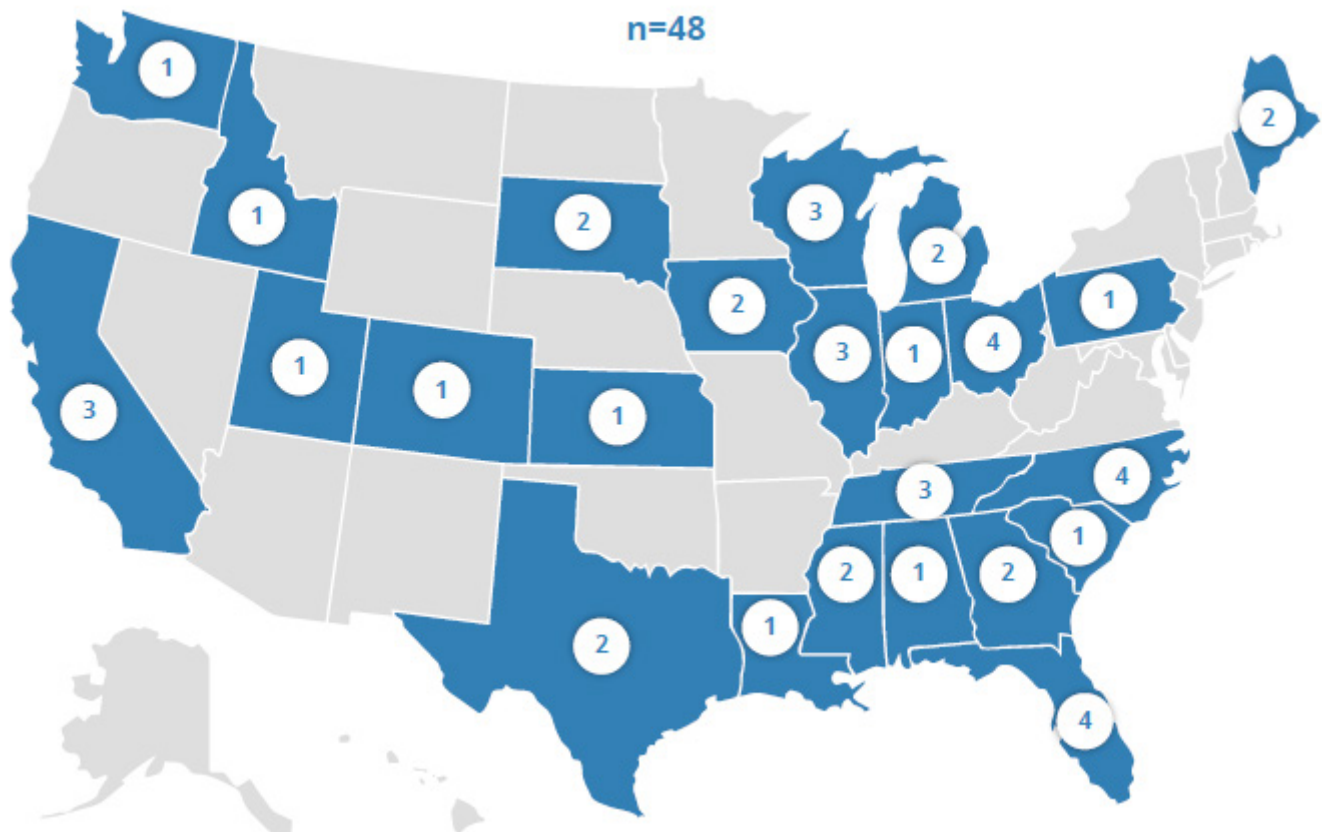
**Participants:** Selected from field representatives, fraternal leaders and members, with a focus on individuals under 50 living in nonrural communities throughout the U.S.



## STAKEHOLDER GROUPS AND RESEARCH TOPICS

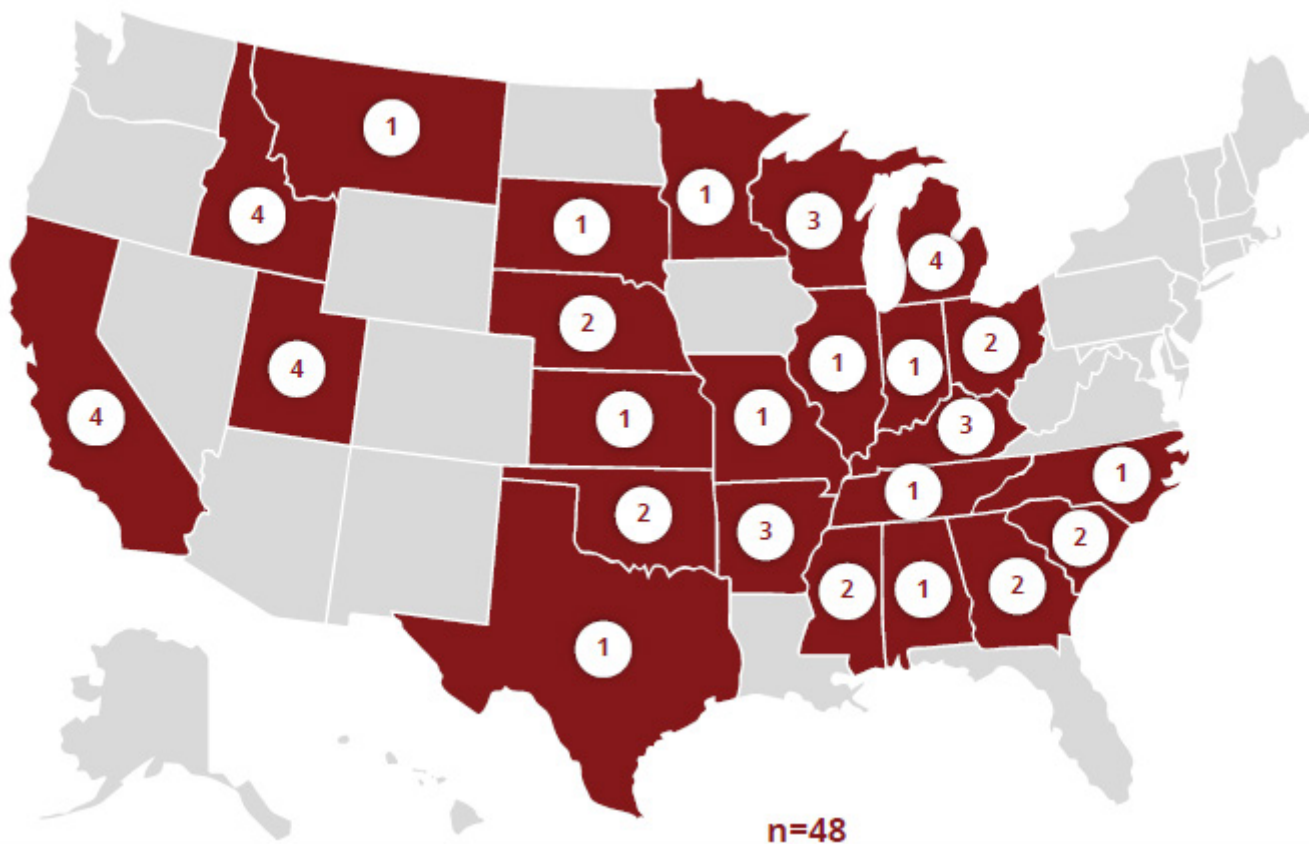
### 1. Field representatives

- **Participants:** 12 regional directors via Zoom interviews. 36 managing partners and financial representatives via online bulletin boards.
- **Key topics:**
  - Importance of fraternalism in business benefits and support.
  - Need for improvement in current fraternal offerings.
  - Future involvement in the lodge (chapter) structure.



## 2. Fraternal leaders

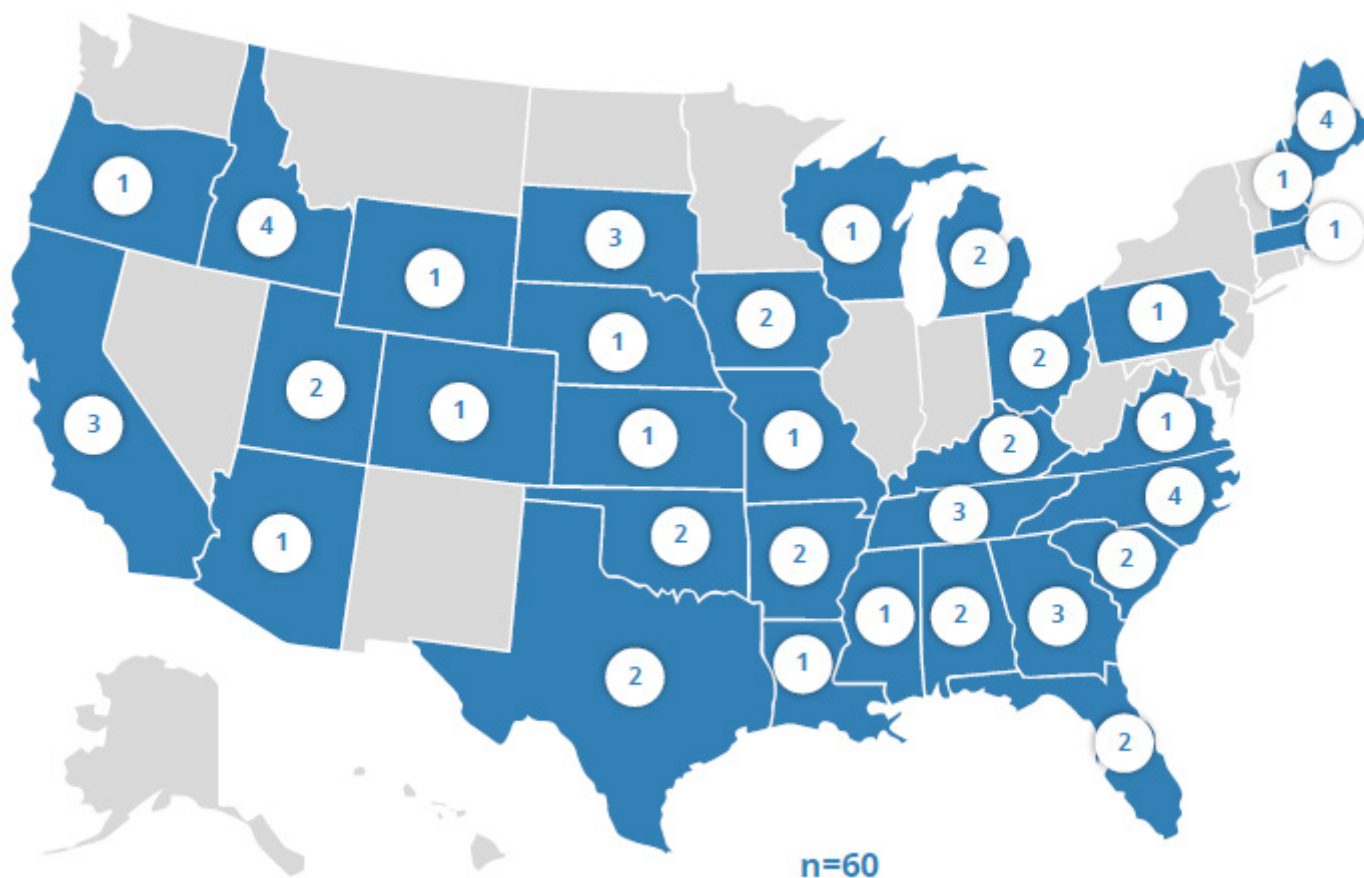
- **Participants:** Eight chapter activities coordinators and seven youth service club leaders via phone interviews. 48 leaders via online bulletin boards.
- **Key topics:**
  - Motivations and views on chapters/clubs.
  - Desired support and improvements.
  - Strategies to attract families and engage other members.





### 3. Members

- **Participants:** 14 diverse members via phone interviews. 60 members via online bulletin boards.
- **Key topics:**
  - Lifestyles, spending habits and interests.
  - Values, hopes, dreams and challenges.
  - Preferred social, service and educational events.



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#### 4. Additional research

- **Legal regulations:**
  - Illinois state code.
  - Modern Woodmen's bylaws.
- **Competitors:**
  - Fraternal benefit societies.
  - Nonprofit competitors.
  - For-profit competitors.
- **Current trends:**
  - Parents and children today.
  - People today.
  - Corporate social responsibility.
  - Social trends.
  - Service trends.
  - Generational differences.
  - Membership organizations.
  - Schools.

### RESEARCH GOALS AND FUTURE IMPACT

The Fraternal Department's research will influence strategic decisions to support its cornerstones for fraternal impact:

- Grow membership, particularly among younger demographics.
- Enhance member touch points and engagement.
- Develop a fraternal career agency channel.
- Improve fraternal operations and governance.

For additional details, please contact the Fraternal Department.



## KEY FINDINGS AND INSIGHTS OVERVIEW

### Membership growth and market expansion

- **Rural and urban balance:** Modern Woodmen traditionally has had a strong presence in rural areas. The research highlights the need to maintain this base while simultaneously tapping into urban markets. This dual approach requires tailored strategies to meet the unique needs of both demographics.
- **Young member families:** There's a growing interest among young families in community-based activities that offer flexible, affordable and convenient social, educational and philanthropic engagement. The research indicates targeted initiatives focusing on this demographic could significantly enhance membership growth.

### Member touch points and engagement

- **Technology integration:** Field representatives and fraternal leaders have emphasized the importance of technology to create meaningful member touch points. This includes using social media, webinars and mobile applications to facilitate communication and engagement.
- **Community activities:** Members highly value social, educational and community activities. Field representatives suggest increasing the funding and diversity of these events to attract and retain members, particularly in new markets.

### Partnership with field representatives

- **Support and resources:** The research underscores the need to provide field representatives with robust support and resources that meet their individual needs. This includes training programs, marketing materials and hands-on support that empower them to better serve their communities.
- **Feedback mechanisms:** Implementing structured feedback mechanisms will ensure field representatives' insights and experiences directly inform strategic decisions. This collaborative approach is essential for fostering a sense of partnership and mutual success.

### New chapter model development

- **Flexible and inclusive structure:** Field representatives and fraternal leaders advocate for a chapter model that's flexible and inclusive, catering to diverse member needs. This involves creating chapters that can adapt to local conditions and member preferences, whether in rural or urban settings.
- **Enhanced leadership roles:** Empowering fraternal leaders with more significant roles and responsibilities within the new chapter model is critical. This includes providing attractive compensation and incentives and offering robust leadership training and development opportunities to ensure they can effectively guide their chapters and support field representatives.
- **Young member engagement:** Specific initiatives targeting young member families should be integrated into the new chapter model. Convenient and affordable activities that combine fun, learning and community service for the whole family are particularly appealing to this demographic.

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## KEY INSIGHTS FROM FIELD REPRESENTATIVES

The research with field representatives revealed opportunities to enhance alignment, support and operational effectiveness.

- 1. Mutual understanding and clarity:** A strong need exists for deeper mutual understanding between field representatives and the Fraternal Department, with clear expectations, policies and rules.
- 2. Flexibility and technology integration:** Representatives seek greater flexibility and unity in decision-making processes, alongside technology that mirrors their personal experiences.
- 3. Omnichannel communication:** Enhancing omnichannel communication strategies, informed by representative input, can expand engagement and outreach effectively.
- 4. Recognition and training:** Recognizing fraternal success and providing customized, accessible training are crucial for motivating and equipping representatives.
- 5. Member-centric programs and engagement:** Programs should cater to diverse member demographics and lifestyles, emphasizing community engagement and creating meaningful touch points.
- 6. Transparency and brand awareness:** Improving transparency in decision making and increasing brand awareness is essential for building trust and credibility.
- 7. Future adaptability:** Future chapter models and programs need to be flexible to accommodate varying demographics and geographic needs effectively.

These insights highlight opportunities to strengthen the partnership between field representatives and Modern Woodmen, fostering greater engagement, satisfaction and strategic alignment.

## KEY INSIGHTS FROM FRATERNAL LEADERS, COMPETITORS AND CURRENT TRENDS

The insights gathered from current trends and Modern Woodmen's fraternal leaders and competitors highlight critical areas for enhancing chapter effectiveness and member engagement.

- 1. Chapter structure and flexibility:** Balancing regulatory requirements with flexibility is crucial for adapting events to meet local community needs and member preferences.
- 2. Leadership investment:** Greater investment in leadership support through clear expectations, personalized training and ongoing communication can significantly enhance chapter success and member satisfaction.
- 3. Motivation and incentives:** While motivated by making a meaningful impact, fraternal leaders benefit from personal recognition and incentives, which can boost engagement and effectiveness.
- 4. Member leadership:** Member leaders who are well-connected in their communities can foster stronger chapter growth, though ensuring alignment with Modern Woodmen's goals remains essential.





- 5. Technology and engagement:** Embracing technology to facilitate member engagement through online donations, event communication and networking tools aligns with industry trends and enhances member connectivity.
- 6. Community impact and alignment:** Highlighting Modern Woodmen's fraternal focus on finances, families and local communities helps differentiate offerings amidst competitive landscapes emphasizing similar values.
- 7. Volunteer engagement:** Flexible and customizable volunteer opportunities, supported by personal outreach and social media engagement, resonate well with members and drive participation.
- 8. Family-friendly events:** Popular events combine fun, safety, education and affordability, catering to diverse family needs and enhancing member retention.
- 9. Activity planning and support:** Simplifying funding, communication and activity guidelines while encouraging idea sharing can streamline event planning and increase participation.
- 10. Competitive landscape:** Recognizing and responding to competitive strategies involving partnerships with nonprofits and innovative member activities ensures Modern Woodmen remains competitive in the fraternal benefit society sector.

These insights provide a strategic framework for enhancing chapter effectiveness, member engagement and community impact within Modern Woodmen's chapter structure.

## KEY INSIGHTS FROM MEMBERS AND PROSPECTIVE MEMBERS

The insights gathered from current trends and Modern Woodmen members highlight key values, challenges and expectations across various demographics and life stages.

- 1. Family and faith:** Members universally prioritize family and faith, dedicating significant time and effort to nurturing these aspects of life.
- 2. Parental priorities:** Raising children and maintaining household stability are paramount for parents, influencing their time, energy and financial commitments.
- 3. Digital age challenges:** Managing children's digital accessibility poses ongoing challenges for parents amidst the constantly evolving digital landscape.
- 4. Health and wellness:** Health and wellness are vital values, particularly for older adults, though balancing these priorities with other responsibilities can be demanding.
- 5. Financial concerns:** Financial stability is a common stressor across generations, exacerbated by child care costs, student loans and the desire to provide enriching experiences for families.
- 6. Community engagement:** Members value local community engagement and seek convenient, family-friendly activities that align with their schedules and values.

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- 7. Tech-savvy generations:** Younger generations are deeply integrated with technology, influencing how they engage socially and consume information.
  - 8. Value and personalization:** Members appreciate personalized products and services that align with their values and enhance their lifestyle experiences.
  - 9. Fraternal awareness and participation:** While awareness of Modern Woodmen’s fraternal programs is high, members primarily engage with chapter events. Increasing awareness and relevance of fraternal offerings could drive greater participation.
  - 10. Brand loyalty and impact:** People are loyal to brands and causes that align with their values and make a tangible difference in their communities.
  - 11. Social and political engagement:** Younger generations are socially and politically active, expecting businesses to reflect their beliefs about social, environmental and cultural issues.
  - 12. Community impact:** Members engage in community support through informal and formal volunteering, with preferences for flexible and meaningful opportunities.
  - 13. Desire for convenience and modernity:** People prefer modern, efficient and accessible processes that simplify their interactions with brands and organizations.
  - 14. Program expectations:** Expanded fraternal programs that offer unique experiences, health and wellness initiatives, and enhanced financial guidance are desired.

These insights provide a foundational understanding of member values and preferences. This will guide Modern Woodmen to enhance fraternal offerings and community engagement strategies to better serve and connect with their diverse membership base.

## ATTRACTING NEW MEMBERS: TRENDS AND STRATEGIES

Modern Woodmen’s research has identified several key trends and strategies essential for attracting new members. This includes secondary research on current trends that resonate with potential members and align with Modern Woodmen’s mission and values.

### 1. Digital engagement

- **Online presence:** A robust online presence is crucial. This includes an active and engaging social media strategy, a user-friendly website, and mobile applications that offer easy access to information and services.
- **Virtual events:** Hosting webinars, virtual workshops and online community events can attract tech-savvy individuals and provide flexible participation options.



## 2. Community involvement

- **Local impact:** Members are increasingly interested in organizations that make a tangible difference in their local communities. Highlighting Modern Woodmen's community projects and encouraging member participation can enhance attraction.
- **Volunteer opportunities:** Offering a variety of volunteer opportunities that align with members' interests and schedules can increase engagement and retention.

## 3. Personal development

- **Educational programs:** Providing educational resources and programs, such as financial literacy workshops, can appeal to potential members seeking personal development.
- **Career support:** Initiatives that support career growth, such as networking events and professional development workshops, can attract young professionals.

## 4. Family-oriented activities

- **Family events:** Organizing events that cater to families, particularly young member families, can create a welcoming and inclusive environment.
- **Youth programs:** Developing programs specifically for children and teenagers can help engage the entire family and foster long-term membership.

## STRATEGIC RECOMMENDATIONS

Some considerations for future enhancements based on the research include:

1. **Expand urban outreach:** Develop tailored marketing and community engagement strategies to penetrate urban markets while maintaining a strong rural presence.
2. **Leverage technology:** Enhance digital platforms to create seamless and engaging member experiences, facilitating better communication and involvement.
3. **Support field representatives:** Invest in comprehensive training and resources to empower field representatives in their roles.
4. **Implement flexible chapter models:** Design adaptable chapter structures that can cater to diverse member needs and preferences, with a focus on inclusivity and flexibility.
5. **Engage young families:** Develop specific programs and activities that attract and retain young member families, fostering long-term membership growth.
7. **Adopt best practices from competitors:** Learn from the successful strategies of competitors, like Thrivent, Gleaner and BetterLife, to enhance Modern Woodmen's offerings.



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## CONCLUSION

The Fraternal Department's research provides valuable insights for attracting new and current members and supporting field representatives and fraternal leaders. Modern Woodmen can better serve its diverse member base and ensure sustained growth and success by focusing on:

- Technology integration.
- Urban market expansion.
- Targeted support for young families.

Additionally, understanding competitor strategies, adhering to legal requirements, and staying abreast of current trends in social, educational and service activities will enable field representatives and fraternal leaders to effectively lead and support their communities.

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## QUESTIONS ABOUT THIS RESEARCH?

Contact Modern Woodmen's Fraternal Department for more information.

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Interviews and discussion boards conducted with the help of Ferguson Insights, an independent marketing research firm. Learn more about them at [fergusoninsights.com](https://www.fergusoninsights.com).