

FAITH & FINANCE

Fraternal Benefit Event Planning Workbook

An 8 to 10-week process
toward maximum success

A Fraternal Benefit Event is not only a great way to remind members of the fraternal benefits available to them, it's also a great way to introduce prospective members to the Knights of Columbus. Use this planning workbook to help your council organize successful events.



Phase 1 / Event Planning: 8 - 10 weeks in advance

Begin planning your event a full 8 to 10 weeks in advance. Employ a collaborative approach between your council, your agent, and a small group of engaged volunteers.

Key Tasks

1. **Grand Knight contacts local agent to discuss support of the idea, determine feasibility and options on timing.**

2. **Grand Knight appoints an event coordinator to act as the official liaison with your local agent.**

- If you're not sure who your local agent is, visit our [Find an Agent](http://kofc.org/faa) page (kofc.org/faa) and enter your council's zip code (or postal code).
- If your council does not currently have an assigned field agent, please contact your general agent to coordinate a fraternal benefit event.

3. **Event coordinator books a first planning meeting with agent and any engaged volunteers. Be sure to book it at least 6 to 8 weeks prior to general event date/timing.**

4. **Propose a working agenda for your first meeting. Agenda to include:**

EVENT DETAILS:

- In person, virtual or hybrid¹
- Date and time options
- Venue options
- Set up needs (AV support, podium, tables, etc.)
- Determine your RSVP process²

EVENT PROGRAMMING:

- Consider offering a children's program or activity in a nearby space to make it clear that both parents and family members are welcome.³

PRESENTATION:

- Your agent will have several approved presentations he can deliver based on the audience and interests of your council.
- Discuss your role in the presentation with your local Agent – and be sure to focus on the life and work of your council.

* Considerations:

1. *If a hybrid event is absolutely required (i.e.: the agent has asked to deliver his presentation from home, office or other offsite location), it is still advantageous to secure a common facility where participants and fraternal leaders can watch the presentation.*
2. *Speak to your local agent about the merits of using an RSVP system to track participants, which will allow for you and your agent to plan for the appropriate number of tables, chairs, supplies, and handouts.*
3. *If and when children are present, be sure to have at least one Knight who has received training and certification from our Safe Environment Program to supervise the children's room/activities.*



5. Once event details are confirmed, capture key information and book location.

Date: _____

Agent name: _____

Time: _____

Agent contact info: _____

Location: _____

RSVP contact: _____

RSVP by date: _____

6. Share event details with your local pastor/council chaplain and any other key guests to ensure attendance.

Planning notes (Use these boxes to track any questions or to do items as you work through the checklist.)



A typical Fraternal Benefit Event program flow

Use this sample program flow to help you determine the right sequence of events for a successful event.

1. Opening prayer (by priest if he is present)
2. Grand Knight (or other appointed fraternal leader) welcomes participants and introduces the agent
3. Agent delivers approved presentation
4. Questions & Answers period
5. Final words from agent
6. Final words from Grand Knight, event coordinator/liaison or other appointed fraternal leader
7. Closing prayer



Online events (virtual)

At times, your field agent may have access to a larger regional virtual presentation in which your council can participate. While your council may not have the flexibility to choose certain details, you can still attend this event, promote it among your local community and receive Star Council credits.



Phase 2 / Promotion: 3 - 4 weeks in advance

Build out your promotional materials, which can be found through the Online Supply Store. Generate maximum interest in your event by allowing for at least 3 to 4 weeks of active promotion, using multiple channels and embracing the power of repetition and reminders. Remember promotion of this event is not just for members – it's for all Catholics looking to learn about financial solutions offered by the Knights of Columbus.

Key Tasks

1. Confirm your promotional efforts. Options to consider:

PROMOTIONAL EFFORT	PLANNED DATE
<p>Emails to:</p> <ul style="list-style-type: none"><input type="checkbox"/> Members (council email blast)<input type="checkbox"/> Prospects<input type="checkbox"/> Clients and prospects of agent	
<ul style="list-style-type: none"><input type="checkbox"/> Make plans to send out at least 2 promotional emails PLUS a reminder email the day before	
<ul style="list-style-type: none"><input type="checkbox"/> Posters in relevant public spaces (e.g.: parish hall and entrance, Catholic school etc.)	
<ul style="list-style-type: none"><input type="checkbox"/> Social media accounts of your council, parish, etc.	
<ul style="list-style-type: none"><input type="checkbox"/> One-to-one communication	
<ul style="list-style-type: none"><input type="checkbox"/> Parish bulletin text, ad or inserts, announcements after Mass, etc.	
<ul style="list-style-type: none"><input type="checkbox"/> Ask parish administration if they can include event in email blasts to parishioners	



Give yourself at least 4 weeks of active promotions.



2. Prepare your promotional materials.

Go to the [Online Supply Store](#) for approved marketing materials – populate them with your contact information, date and location, RSVP details.

Note: If your event coordinator does not have access to the Online Supply Store, assist him in providing access to sample bulletin announcements, posters, social media posts and sample emails.



Visit the **ONLINE SUPPLY STORE** for the complete assortment of up-to-date resources.

3. Track RSVPs and share.

Share with agent and other partners as needed to assist in room set-up and leave-behind requirements.

4. Send a reminder email to all who have RSVP'd.

24-48 hours before the event

Planning notes



Phase 3 / Event logistics: day of event

Good audio/visuals, a brief but diverse program that flows efficiently, and time for socializing are critical to the success of your event. Before the event date, be sure to review your event plan/schedule, and to discuss any concerns with your agent or committee. On the day of the event, give yourself enough time for setup and any final preparations.

Key Tasks

1. Event coordinator arrives early to site (on event day) to make sure everything is set up.

- Set up registration table (your agent will provide a sign-in sheet).
- Set up KofC Information table with promotional materials.
- Test A/V and presentation (if you are planning to play a video, please be extra vigilant).

It is a good idea to play a short promotional video at the beginning of your event. Our Year in Review videos can serve this purpose wonderfully. Conduct a search in your preferred search engine to find "Knights of Columbus 2022 Year in Review".

2. Mobilize your hospitality team.

- Welcome guests as they arrive.
- Ask attendees to complete the sign-in sheet provided by agent.

3. Start your event on time (unless extraordinary circumstances arise).

Reference the typical program flow provided in phase 1 of this workbook.

4. At the end of the event, remind attendees how they can get more information.

- Provide the agent's contact information for information on products offered.
- Provide council contact information for those interested in learning more about the Order.

5. Thank all attendees, council leadership, spiritual director, other volunteers and the agent.

Planning notes



Phase 4 / Post Event

A good follow up is, in many cases, critical to reaching new members and engaging existing members. Your agent will plan to follow up with all attendees but it's also important for your council to follow up with prospective members.

Key Tasks

1. Council leadership follows up with attendees in your council area – those interested in joining your council.

- Ask agent for a copy of the sign-in sheet – follow up with participants who demonstrated an interest in joining your council.
- A personal phone call and email (both) is always best.

2. Hold a debrief / post-mortem of your event.

- Event coordinator should hold a debrief meeting with the field agent in attendance.

Review:

- What went well?
- What could be improved?
- What was your Priest/council chaplain's feedback?
- When can you organize the next event?

3. Fraternal leadership completes form no. 11077 – Fraternal Benefit Seminar Form.

Available on kofc.org/forms

4. Plan an Exemplification of Charity, Unity and Fraternity in the weeks after a Fraternal Benefit Event. It can then be promoted at your event and thus becomes part of the follow up with prospective members. Agents should plan to be present for maximum success.

Planning notes

