


Chapter Action Planning for 2010

Where to Start?

- 1. What is your mission – your reason for being?** A mission statement is a clear and compelling goal that focuses people’s efforts. It is specific, crisp, clear and engaging, and reaches out and grabs people (*E.g. “This nation should dedicate itself to, before this decade is out, landing a man on the moon and returning him safely to Earth.”*)

A chapter mission statement can help explain to others what your chapter does, help to determine your chapter's focus, and guide your planning and funding decisions. What are the opportunities or needs that exist, and what will be done to address those needs? What principles or beliefs guide your work? How could your chapter support Thrivent Financial’s [mission and vision](#)?



- 2. What are the most important goals for your chapter in 2010?** Goal-setting will help to achieve your chapter mission. Goals should be straightforward and emphasize what you want to happen. Be specific. [*Examples: (1) Plan and conduct one all-member social activity by (date); (2) Work with our financial representatives to host three educational events by (date); (3) Plan a large fundraising activity that involves many congregations by (date).*]

The Chapter of Excellence program will give you guidance in goal-setting, and recognize chapters performing at a high level. Review your [Chapter Dashboard](#) (located in your [Chapter Leadership Administration Menu](#) under the Reports/Listings) for guidance on 2010 goals for your chapter. The four key areas of focus for the program are:

- 1. Growth in member households** – Growth in membership is a sign of a healthy, thriving organization.
- 2. Net Promoter Score of your chapter members** – Indicator of whether or not members would refer others to Thrivent Financial.
- 3. Societal impact** – Volunteer hours and dollars raised.
- 4. Number of educational/member social activities held** – Goal for the year is a combined total of four.

| | GOAL |
|---|------|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |

3. **How do we do it?** You've determined your goals. Now it's time to take action! Action planning is a way of breaking down your goals into bite-sized action steps. Here's where you identify actions, target audience(s), goals, timelines and resources needed to achieve chapter goals for the coming year.

Action planning will help to guide your board as it leads the chapter in engaging its members and living out its mission.

- Begin with the End in Sight
- Use the attached **Chapter Action Plan** template to:
 - Record action items to achieve goals
 - Pencil-in dates for:
 - Chapter meetings [In person, by phone, or by e-mail]
 - Mailings
 - Volunteer Recognition Event
 - Election Meeting
 - Educational Events
 - Social Events
 - Determine the person responsible and due date
 - Review reminders and key dates
- Check your progress by referencing your Chapter Dashboard, which is located in your [Chapter Leadership Administration Menu](#) under the Reports/Listings heading.

Remember - You choose your goals, you set the pace, and you put yourself in the driver's seat by creating an action plan for achieving your goals.

Vision without action is just dreaming.
Action without vision just passes time.
But, if we can combine the right vision with the right actions,
we can change the world.
*Joel Barker from **The Power of Vision***

Chapter Action Plan - 2010

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|--|---|--|---|-----------------------|---|
| J A N U A R Y | Meeting Date: | F E B R U A R Y | Meeting Date: | M A R C H | Meeting Date: |
| | Meeting Time: | | Meeting Time: | | Meeting Time: |
| | Meeting Place: | | Meeting Place: | | Meeting Place: |
| | Action items/Person Assigned/Due Date: <ul style="list-style-type: none"> • <i>[Example: Start planning for Thrivent Day at the Ballpark all-member social activity; John Smith; July 17]</i> | | Action items/Person Assigned/Due Date: <ul style="list-style-type: none"> • | | Action items/Person Assigned/Due Date: <ul style="list-style-type: none"> • |
| | Reminders: <ul style="list-style-type: none"> • Begin the chapter audit process • Review Chapter of Excellence criteria • Plan the yearly calendar by quarter • Map out chapter mailings; assign authorship • Review new leader role-specific webinars • Approve and record Chapter Financial Associate Advisor(s) | | Reminders: <ul style="list-style-type: none"> • Chapter summary reports due • Identify at least three social and or educational events; appoint event leaders • Determine operating funds allocation • Confirm financial processes for reporting operating expenses online | | Reminders: <ul style="list-style-type: none"> • Confirm that meetings and their minutes are both being recorded online • Solidify plans for sharing the roll out of Thrivent Choice • Review Chapter Calendar |
| Key dates/events: <ul style="list-style-type: none"> • Mid Jan – First CAIC activity may be entered; first funds deposited into account • Mid Jan – First half of operating funds deposited | Key dates/events: <ul style="list-style-type: none"> • Feb 17 – Ash Wednesday • Feb 28 – Chapter audit due | Key dates/events: <ul style="list-style-type: none"> • | | | |
| 1st Quarter Chapter Mailing Topics: | | | | | |

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|---|--|--|--|
| A P R I L | Meeting Date: | Meeting Date: | Meeting Date: |
| | Meeting Time: | Meeting Time: | Meeting Time: |
| | Meeting Place: | Meeting Place: | Meeting Place: |
| | Action items/Person Assigned/Due Date: • | Action items/Person Assigned/Due Date: • | Action items/Person Assigned/Due Date: • |
| M A Y | 2010 | M A Y | Meeting Date: |
| | | | Meeting Time: |
| | | | Meeting Place: |
| | | | Action items/Person Assigned/Due Date: • |
| J U N E | 2010 | J U N E | Meeting Date: |
| | | | Meeting Time: |
| | | | Meeting Place: |
| | | | Action items/Person Assigned/Due Date: • |
| Reminders: | | | |
| <ul style="list-style-type: none"> • Nominations open for the national Board of Directors • Review progress towards Chapter of Excellence | | | |
| Key dates/events: | | | |
| <ul style="list-style-type: none"> • April – First Thrivent Choice Voting Event • April 4 – Easter • April 18-24 – National Volunteer Week • April 23-25 – National Youth Service Day | | | |
| Reminders: | | | |
| <ul style="list-style-type: none"> • Review first quarter results on Chapter Dashboard, and determine if modifications to yearly plan are needed • Confirm second quarter plans | | | |
| Key dates/events: | | | |
| <ul style="list-style-type: none"> • May 1 – Join Hands Day | | | |
| Reminders: | | | |
| <ul style="list-style-type: none"> • Establish the chapter elections nominating committee • Review plan to use all Care Abounds in Communities® funds | | | |
| Key dates/events: | | | |
| <ul style="list-style-type: none"> • | | | |
| 2nd Quarter Chapter Mailing Topics: | | | |

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|--|--|----------------------------|--|---|--|--|--|--|
| J U L Y | Meeting Date: | A U G U S T | Meeting Date: | S E P T E M B E R | Meeting Date: | | | |
| | Meeting Time: | | Meeting Time: | | Meeting Time: | | | |
| | Meeting Place: | | Meeting Place: | | Meeting Place: | | | |
| | Action items/Person Assigned/Due Date: <ul style="list-style-type: none"> • | | | | Action items/Person Assigned/Due Date: <ul style="list-style-type: none"> • | | | |
| Reminders: <ul style="list-style-type: none"> • Chapter Nominating Teams begin their work • Review progress towards Chapter of Excellence | | | Reminders: <ul style="list-style-type: none"> • Review 2nd quarter and adjust 3rd quarter plans • Review Chapter Calendar | | | Reminders: <ul style="list-style-type: none"> • Create and submit election invitation mailing • Chapter elections may be held through Nov. 30 • Review plan for use of allocated operating funds by year-end | | |
| Key dates/events: <ul style="list-style-type: none"> • Mid July – Second deposit of operating funds | | | Key dates/events: <ul style="list-style-type: none"> • | | | Key dates/events: <ul style="list-style-type: none"> • Sep 1–First day chapter elections can be held | | |
| 3rd Quarter Chapter Mailing Topics: | | | | | | | | |

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| O C T O B E R | Meeting Date: | N O V E M B E R | Meeting Date: | D E C E M B E R | Meeting Date: | | |
| | Meeting Time: | | Meeting Time: | | Meeting Time: | | |
| | Meeting Place: | | Meeting Place: | | Meeting Place: | | |
| | Action items/Person Assigned/Due Date: • | | Action items/Person Assigned/Due Date: • | | Action items/Person Assigned/Due Date: • | | |
| | Reminders: • Chapter elections may be held • Review progress towards Chapter of Excellence | | Reminders: • Chapter elections conclude and must be reported by December 31 • All leaders return IRS 990 to chapter president | | Reminders: • Enter newly elected leaders online • Fill out/submit signature Chapter Depository Authorization form (bank signature card) | | |
| | Key dates/events: • Oct 10 – National Clergy Appreciation Day • Oct 23 – Make a Difference Day | | Key dates/events: • Nov 20 – National Family Volunteer Day • Nov 30 – Last day chapter elections can be held • Nov – IRS 990 Verification letter sent to all leaders. | | Key dates/events: • Dec 10–Suggested last day for activity/funding requests submitted to chapter board • Dec 17– Last day '10 projects can be entered • Dec 31– Report activity results online; last day election results may be entered | | |
| | 2010 | | | | | | |
| | 4th Quarter Chapter Mailing Topics: | | | | | | |