

# 2012 Chapter Planning Template

A guide for planning your chapter's journey

## Mission is your purpose or driving force

Think about the process of planning like preparing to go on a journey. Using that analogy, mission is about understanding your purpose in going on the journey in the first place. Is it to create lasting memories for your children or to expand your knowledge of another culture?

At Thrivent Financial for Lutherans, we all share the same mission:

To **strengthen Christian communities** by:

- Helping members be **wise with money**
- Inspiring them to **live generously**

## Goals are your desired end point

Using the journey analogy again, think of goals as your destination. **All chapters share two common goals:**

- To create meaningful ways for current Thrivent Financial members to become more engaged with their chapter and organization, resulting in a greater sense of ownership and increased advocacy for Thrivent Financial.
- To develop and nurture relationships with people in your local community who are not Thrivent Financial members in order to build awareness and understanding of the organization and the impact we have in the lives of our members and their communities.

## Strategies are the roadmap to help you achieve your mission and goals

Strategies help answer the question, "How will we reach our destination?" Should we travel by air, land, or sea? Do we take the scenic route or the interstate? Certainly, there are many ways to achieve your chapter's mission and goals. We recommend agreeing on 2-4 key strategies for 2012. Then, complete the template beginning on page three of this guide. We've included strategy options for you to discuss and consider. Feel free to use the ideas below or create your own!

- Seek out member and community feedback in order to identify the types of causes, activities and actions that will get people involved.
- Create visibility in your community about Thrivent Financial and what your chapter does.

- Focus on recruitment of chapter leaders in order to bring greater diversity of thoughts, ideas, and strengths to your board.
- Create opportunities for members and non-members to interact with Thrivent Financial representatives in order to help people on the path to financial security.
- Identify a specific cause or organization for your chapter to partner with on a longer-term basis in order to bring greater focus to your chapter's outreach and rally members around an important community need.

### **SAMPLE: Strategy with tactics and milestones**

**Strategy:** *(What is our roadmap? How will we get there?)*

Seek out member and community feedback in order to identify the types of causes, activities and actions that will get people involved.

**Tactics:** *(What are the essential tasks that help us stay on our path? What sights do we want to see on the way? What hotel reservations should we make? Do we have a spare tire in the trunk, just in case?)*

- Invite city council member, Jane Smith, to speak about community needs at our 2/15 chapter board meeting.
- Each board member will reach out to 5 members to seek feedback and ideas for new activities in 2012 by 3/15.
- Provide a survey to attendees at our next 4 chapter-sponsored activities to get feedback and ideas.
- Hold a New Member Welcome event in May and use that as an opportunity to learn about activities and causes important to those new members.

**Milestones/measures:** *(What are the benchmarks along the way to track and measure progress? How's the journey going so far? Are we on track? Do we need to make any adjustments going forward?)*

- Get feedback from 100 members by 6/15.
- Plan and hold two new activities based on that feedback by 12/31.
- 50 people attend those 2 activities that have never attended a chapter event before.

## 2012 Chapter Plan

**Chapter Name:**

**Strategy 1:** *(What is our roadmap? How will we get there?)*

**Tactics:** *(What are the essential tasks that help us stay on our path?)*

**Milestones/Measures:** *(What are the benchmarks along the way to track and measure progress? Are we on track?)*

**Strategy 2:**

**Tactics:**

**Milestones/Measures:**

**Strategy 3:**

**Tactics:**

**Milestones/Measures:**

**Strategy 4:**

**Tactics:**

**Milestones/Measures:**