

Educational Activity Planning Checklist

Educational activities provide Thrivent chapters with another opportunity to attract and involve more members, help them be wise with money and inspire them to live generously. Chapter operating funds and Care Abounds in Communities® program funds can be used to support educational activities* (see definition to the right) **except** for those that have a substantial purpose of promoting sales of products and services, including Thrivent Financial products and services. This checklist is designed to help you identify, plan, organize and implement your eligible educational activity.

Educational activity:
Instruction/training to improve capabilities or knowledge about useful topics that benefit, are of interest to and will attract Thrivent Financial members and others.

1. Get Started

- Identify topic**
 - Is there a topic that will interest many members and/or meet a need common to many members in your area? What topic will attract members who are not usually involved with the chapter? (See page 2 for a list of other questions to consider.)
 - Would a Thrivent Financial educational workshop (see box below) interest members? Do you have Thrivent Financial representatives who would welcome the opportunity to lead a workshop?
- Form a service team to plan, conduct and promote activity**
 - Include at least six Thrivent Financial members from different households on the planning team. The team can include chapter leaders, members and nonmembers. Involve others to help plan a successful activity. Don't be afraid to ask!
 - Ask your Thrivent Financial representative(s) to be involved.
- Get activity and funding approval***
 - The chapter leadership board must approve use of operating funds or Care Abounds in Communities program funds for eligible educational activities.

Consider Thrivent Financial educational workshops

Chapter operating funds and Care Abounds in Communities funds can be used to support specific workshops, led by Thrivent Financial representatives (FRs), which educate participants about various topics in the context of their values.

The workshops cover topics important to Thrivent Financial members and meet member needs in a way that directly connects with Thrivent Financial's areas of expertise.

A list of eligible FR-led workshops and how you can support them is available in CHIP. Go to www.thrivent.com/chip and search on "educational workshops."

** Important note: The predominant use of Care Abounds in Communities program funds must be for charitable activities (fundraisers and service projects). Chapters are encouraged to use operating funds first for educational activities.*

2. Develop a Plan

To help plan your activity, consider using the **Activity Plan Worksheet** located on the Chapter Activities & Programs tab of [Resources for All Chapter Leaders](#) on Thrivent.com.

- Coordinate volunteers**
 - How many volunteers will you need to conduct the activity? Consider the tasks before, at and after the activity.
 - Who and how will you recruit volunteers? Invite Thrivent Financial representatives to help.
 - Who will present or lead the activity?
- Determine logistics**
 - Date and time that will get the greatest potential of participants to attend.
 - Venue based on availability, cost to rent, capacity, location, accommodations (hotels), resources (chairs, tables, AV equipment, etc.).
 - How will you invite participants? (Consider postcard or newsletter through Chapter Mailing Service, bulletin inserts, posters, etc.)
 - Reminder: Invitees may not be based on past or desired future Thrivent Financial product purchases.*
 - Post event at Thrivent.com/registeranevent.
 - Length of activity and types of refreshments.
 - Materials needed and how to get materials (factor in length of time to get materials).
 - Will you need to pre-register attendees? How will you handle RSVPs?
 - Determine how you will track attendees.
- Publicity**
 - How will you promote your educational activity? View tips and materials in the Visibility Toolkit at www.thrivent.com/visibility.
 - Order Chapter Supplies from the Chapter Leadership Administration page, [The Store](#) and the [Thrivent Financial Catalog](#).
 - How will you promote Thrivent Financial at the activity? (e.g., visually and verbally)?

Educational Activity Planning Checklist *(continued)*

3. Do It!

- Arrive early** to talk with volunteers about tasks for the day.
- Greet** your guests.
- Recognize** Thrivent Financial representatives and volunteers.
- Ask for and save **receipts** for any expenses related to this activity.
- Track volunteer hours.** Remind the volunteers to keep track of their hours.
- Track attendance at the activity. An [Attendance Sheet](#) is available from the [Forms](#) page on Thrivent.com.

TIP: By registering your event online at Thrivent.com/registeranevent, your chapter can receive email confirmation when members register for an event. You can then create an attendance sheet for your activity.

4. Report, Recognize and Celebrate!

- Report activity**
 - When operating funds are used, the chapter reports the activity as a locally supported activity and reports operating funds expenses on the Manage Chapter Operating Funds screens in the Chapter Leadership Administration Menu.
 - When Care Abounds in Communities program funds are used, the chapter reports the activity as a Care Abounds in Communities activity.
- Pay bills and provide expense reimbursements.** Give receipts and paperwork to the chapter leadership board.
- Thank and recognize volunteers.** See the [Recognizing volunteers](#) page in CHIP for ideas.
- Share your story!** Go to www.thrivent.com/stories.

Is this a good activity to consider?

Here are some questions to consider as you determine and plan your activity:

- How will the activity:
 - Be relevant to the interests and needs of members?
 - Be appealing so that many members will want to attend and participate?
 - Be simple and easy for members to attend and participate (venue, time, etc.)?
 - Help members be wise with money and inspire them to live generously?
 - Promote interaction that strengthens relationships among members and creates a great member experience?
Tip: As you plan, be aware of and respect potential differences of opinions on social issues and theology or doctrinal differences that could compromise the member experience.
 - Promote the value of membership?
- Is the cost of the activity a good value in relation to the expected number of members attending?
- Is the substantial purpose of the activity something other than promoting sales of products and services, including Thrivent Financial products and services?
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Ideas for Educational Activities

- **Identity Theft**
- **Environmental issues**
- **Senior care/Youth programs**
- **Thrivent Financial educational workshops**
- **Wellness (see note below)**
- **Local community programs**
- **Stewardship**
- **Lutheran heritage**

Note: For specific guidelines about serving alcohol, renting transportation, health-related and wellness activities, and other liability issues, please see CHIP (www.thrivent.com/chip).