

# Member Social Activity Planning Checklist

Member social activities provide Thrivent chapters with another opportunity to attract and involve more members, helping them better connect with Thrivent Financial for Lutherans. Chapter operating funds\* and Care Abounds in Communities® program funds can be used to support member social activities (see definition at right) for members and their personal guests. This checklist is designed to help you identify, plan, organize and implement your member social activity.

**Member Social activity:**  
Bringing Thrivent Financial members and their personal guests together to strengthen relationships among members.

## 1. Get Started

- Identify activity**
  - Is there an activity or venue that many members in your chapter will want to attend? What will attract members who usually aren't involved in chapter activities? (See page 2 for a list of other questions to consider.)
  - What options are available in your community or congregations that would interest members, such as a picnic at the park, musical event, theatre or other area attraction, etc.? (See page 2 for more ideas.)
- Form team to plan, conduct and promote activity**
  - Think about how many people will need to be on the planning team. The team can include chapter leaders, congregational advocates and members. Involve others to help plan a successful activity. Don't be afraid to ask!
  - Ask your Thrivent Financial representative(s) to be involved.
- Get chapter leadership board approval**
  - The chapter leadership board must approve the activity and any funding to support the activity.

**TIP:** As you develop your plan, consider using the **Activity Plan Worksheet** located on the Resources for All Chapter Leaders page (under Chapters>Volunteer Leader Resources>For Chapter Leaders) of Thrivent.com.

**\* Important notes:** The predominant use of Care Abounds in Communities funding must be for charitable activities (fundraisers and service projects). Chapters are encouraged to use operating funds first for member social activities. Member social activities that involve collecting fees from participants must be funded with operating funds.

## 2. Develop a Plan

- Coordinate volunteers**
  - How many volunteers will you need to conduct the activity? Consider tasks that need to be completed before, at and after the activity.
  - Who and how will you recruit these volunteers? Invite Thrivent Financial representatives to help.
  - Who will emcee or lead the activity?
- Determine logistics**
  - Date and time that will get the greatest potential of members to attend.
  - Time needed to plan the activity.
  - Venue based on availability, cost to rent, capacity, ease to get to, accommodations (church, restaurant) and resources (chairs, tables, AV equipment, etc.).
  - How will you invite Thrivent Financial members? (Consider postcard or newsletter through Chapter Mailing Service, Find Events & Workshops on thrivent.com, bulletin inserts, posters etc.)  
**Reminder:** Invitees may not be based on past or desired future Thrivent Financial product purchases.
  - Length of activity, refreshments, entertainment.
  - Materials needed and how to get materials (factor in length of time to get materials).
  - Will you need to pre-register members and their personal guests? How will you handle RSVPs?
  - Determine how you will track attendees.
- Publicity**
  - How will you promote your member social activity? See Visibility Toolkit at [www.thrivent.com/visibility](http://www.thrivent.com/visibility) for tips and materials available.
  - Order Chapter Supplies from the Chapter Leadership Administration page for name tags, posters and more.
  - How will you promote Thrivent Financial at the activity (e.g., visually and verbally)?

 **Thrivent Financial for Lutherans®**  
**Let's thrive!™**

# Member Social Activity Planning Checklist *(continued)*

## 3. Do It!

- Arrive early** to talk with volunteers about tasks for the day, etc.
- 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 [Forms](#) on Thrivent.com.

**TIP:** By registering your event online at [Thrivent.com/registeranevent](http://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.

### Consider using Thrivent Financial logo items

Visit "[The Store](#)" on Thrivent.com to purchase logo shirts, banners, paper goods and small gifts to help gain awareness at your event. Small personal touches by your team will be appreciated by your members.

## 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 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 financial director.
- Thank and recognize volunteers.** See the [Recognizing Volunteers](#) page in CHIP for ideas.
- Share your story!** Go to [www.thrivent.com/stories](http://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.)?
  - Promote interaction that strengthens relationships among members and creates a great member experience? *Tip:* As you plan, be aware of and respect 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?

### Ideas for Member Social Activities

- **Family Fun Day/Night**
- **Member Appreciation Activities**—picnic, theatre, zoo trip, museums, etc.
- **Thrivent Night at the Ballpark**
- **Summer celebrations**
- **Christmas parties**

Note: For specific guidelines about serving alcohol, renting transportation and liability issues, please see CHIP ([www.thrivent.com/chip](http://www.thrivent.com/chip)).