

Preparing for your chapter's journey in 2012

Chapter Planning Facilitator Guide

□ Introduction

Thank you for leading the way!

As a fraternal benefit society and member-owned organization of the 21st century, Thrivent Financial continues to evolve in becoming member-*driven*. This means listening to our full membership, meeting their needs, nurturing their ideas, and becoming an organization that is fueled by growth. Our chapters are increasingly becoming more strategic about how to best fuel that member energy, engagement and growth, while furthering our mission of helping people be wise with money and inspiring them to live generously.

As part of this exciting ongoing evolution, chapter leaders are examining how their events, workshops, community investments, and partnerships help contribute to the whole. In the past, the goal of some chapters was to spend their Care Abounds budgets. Now, they are considering new or additional ways to serve the needs in their local communities.... In the past, some chapters have concentrated their impact in small areas. Now, they are thinking more broadly – beyond their churches and individual grantees.... In the past, some chapters waited for proposals to arrive before taking action. Now they are taking a more proactive approach in identifying community needs and solutions.

This isn't necessarily about chapters doing *more*...rather, it's about chapters being very intentional and focusing on how they can make a stronger impact in their community. It might be helpful to think in terms of *quality, not quantity* – sometimes less *is* more! Refer to the “Chapter Success Stories” on pages 7 and 8 of this Guide to see examples of how chapters are making a real difference in their community!

As president of your chapter board, you are in a position to inspire your board to define how you would like to live out the mission of Thrivent Financial in your community. Thank you for volunteering to lead your chapter in this important work!

Purpose of this Guide

The purpose of this Facilitator Guide is to help prepare you to engage your chapter board in meaningful dialogue and thoughtful, deliberate planning about how you will continue in your efforts to make Thrivent Financial's mission relevant in your community. The goals of more deliberate chapter planning are to:

- Prepare all of Thrivent Financial's chapters to work in concert to achieve our mission.
- Equip each chapter to identify and leverage its strengths.
- Enable each chapter to track progress, as well as share and celebrate achievements.
- Help each chapter think through how to maximize their time, ideas, and contributions to ensure an enriching and positive experience for its local members.

A note about timing and process

Effective planning is a process that happens over time. The best ideas emerge out of rich dialogue and reflection. So, be assured that it's okay – and even *preferable* – to plan over a series of chapter board meetings. Perhaps a realistic goal is for you and your board to complete your initial plan by late March. As the year progresses, you'll review the plan on a regular basis to refine it, as necessary, and to assess your progress.

□ **Essential Chapter Planning Elements**

Key components for success

An effective and meaningful plan has five primary components: Mission, Goals, Strategies, Tactics, and Milestones. Let's use the analogy of going on a journey:

- **Mission** – the purpose and driving force. *Why are we going on the journey? Is it to create lasting memories for our children or to expand our knowledge of another culture?*
- **Goals** – the desired end point. *What is our destination – our desired end point?*
- **Strategies** – the roadmap. *How will we get there? Are we traveling by land, sea, or air? Should we take the scenic route or the interstate?*
- **Tactics** – the essential tasks that help us stay on our path. *Have we programmed the GPS? Did we make hotel reservations? Do we have a spare tire in the trunk, just in case?*
- **Milestones** – 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?*

What all chapters have in common: mission and goals

Thrivent Financial chapters across the entire country *share the same mission* – to strengthen Christian communities by helping people be wise with money and inspiring them to live generously. They also *share the same goals*:

1. 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.
2. 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.

What is unique to each chapter: strategies, tactics, and milestones

All chapters share the same mission and are working toward the same goals. However, each chapter board will choose strategies, tactics, and milestones that are unique to them, based on the needs of their members and the opportunities in their community.

A number of strategies that align with the goals above are included in the planning template. You can choose to adopt two or three of these strategies, and/or create your own. Once you've identified your strategies, you'll need to create tactics that support them. (You might find that some of your tactics serve more than one strategy!) Finally, don't forget to identify some milestones to help you stay on track and measure your progress.

Chapter planning materials

- Chapter planning facilitator guide
- *The Thrivent Way* bookmarks
- Chapter planning template (includes examples)

□ **Facilitating the Chapter Planning Process**

Please note:

A sample agenda for your first chapter board meeting is provided below (and as a one-page document in the appendix). As mentioned earlier, you can't rush the planning process if your goal is to have a meaningful and effective chapter plan for the coming year! So it is assumed that the discussion questions and the actual tasks of creating the plan will carry over into subsequent meetings.

Your first chapter board meeting - sample agenda

1. Welcome and Introductions

Go around the room and ask people to share the following as they introduce themselves:

- Name
- Where they live
- Their role on the board
- What are they most excited about? What is their most pressing question or concern?

2. Icebreaker

The purpose of this activity is to get people thinking about what it feels like to be an engaged member of an organization by drawing on their own experience.

Give instructions:

I'd like each of you to think of an organization that you've joined. It could be something you're currently a part of or an organization you belonged to in the past. (Examples: faith community; PTA; neighborhood association; civic organization; alumni association; etc.)

- *Why did you join?*
- *Do you / did you feel engaged in that organization?*
 - *Why or why not?*

(Allow a few minutes of quiet time for people to gather their thoughts. Then, share your example before asking others to share theirs.)

Summarize:

- After every one has had an opportunity to share their responses, engage your board members in summarizing what they heard:
 - What common themes were there?
 - What factors helped people feel engaged?
 - What factors led to people feeling disengaged?
- Make tie to Thrivent Financial members and prospective members:
 - What are we already doing that is attracting people to Thrivent Financial and that is generating energy and momentum? How can we build on that?
 - What could we do differently that will cause our members to become more involved in the organization and so that they'll share their experiences with others?

3. Devotion or Reflection

Offering a devotion, prayer or reflection is especially appropriate since Thrivent Financial is a faith-based organization. This can serve as a foundation for the meeting and help focus members on the discussion that is to follow.

You may want to share scripture from Thrivent Financial's founding fathers used in defining the ministry of Thrivent:

Galatians 6:2-10, New International Version (NIV)

² Carry each other's burdens, and in this way you will fulfill the law of Christ. ... ⁹ Let us not become weary in doing good, for at the proper time we will reap a harvest if we do not give up. ¹⁰ Therefore, as we have opportunity, let us do good to all people, especially to those who belong to the family of believers.

Here are some scripture passages that reinforce members' gifts:

1Peter 4:10 (NIV)

Each one should use whatever gift he has received to serve others, faithfully administering God's grace in its various forms.

Romans 12 (NIV)

⁴ For just as each of us has one body with many members, and these members do not all have the same function, ⁵ so in Christ we, though many, form one body, and each member belongs to all the others. ⁶ We have different gifts, according to the grace given to each of us. If your gift is prophesying, then prophesy in accordance with your^[a] faith; ⁷ if it is serving, then serve; if it is teaching, then teach; ⁸ if it is to encourage, then give encouragement; if it is giving, then give generously; if it is to lead,^[b] do it diligently; if it is to show mercy, do it cheerfully.

4. Begin the conversation

Note: The goal here is to create the space and environment for your board to engage in rich, healthy conversation *before* you actually begin to plan. A good place to start is by reflecting on Thrivent's mission and what it "looks like" for your chapter to live out our mission in your community.

Give each board member a bookmark. (These were included in your chapter planning packet.) Read aloud (or ask someone else to read) the words under *The Thrivent Way*:

We are a faith-based membership organization. Our purpose is to strengthen Christian communities by:

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

Following are some questions that you can pose to the group. Remember to allow time for your board members to reflect on them. Silence is sometimes difficult for a facilitator, but it's important to give people a little quiet time to gather their thoughts before responding. Don't feel that you need to address every question – the goal is *to engage people in meaningful conversation!*

- When we think about *strengthening our community*, what comes to mind?
 - What has our chapter done in the past to strengthen our community?
 - What are the key needs in our community?
 - What stories have you heard others tell about building a stronger community?
- What does it mean to help others *be wise with money*?
 - Why is this important?
 - How has our chapter helped others be wise with money?
 - What else could we consider doing?
- What comes to mind when we think of *inspiring others to live generously*?
 - Who has been an inspiration *to you* to live generously? In what way?
 - How has our chapter inspired generosity in the past?
 - What else could we consider doing in the future?

5. Set the stage for planning

Provide an overview of the *Essential Chapter Planning Elements* from page 2 of this Guide. Perhaps you could personalize the analogy by telling a story about a trip *you've* taken. Or you could use a different example. The important thing is that you can *draw the parallels from your story to the five elements of planning*: mission, goals, strategies, tactics, and milestones.

As you begin planning, it might be helpful to have the chapter planning template in front of you. (You might choose to make copies of the template for each board member.)

- Review the two goals that you will be working toward this year. (These are listed on page 2 of this Guide *and* on your chapter planning template.)
- Next, review the five strategies listed on your chapter planning template. In light of the conversation your board has had, which strategies do you want to focus on this year?
- Begin to identify tactics and milestones in support of the strategies you have chosen.

A final note:

The appendix to this Guide contains a *list of questions* to help you reflect on the strategies and tactics you've chosen to support your goals. As mentioned earlier, the appendix also includes some *wonderful stories* about how Thrivent Financial chapters across the country have brought members and non-members together to strengthen their local communities while helping more people get to know and see the value in the work our organization does. These may be sources of inspiration to you and your board members as you begin to plan the ways in which *your chapter* will change lives in your local community – and beyond – by helping people to be wise with money and inspiring them to live generously.

Thank you, again, for your leadership in this important endeavor!

APPENDIX A

Chapter Success Stories

Packaged with Care



CEDAR FALLS, IOWA—The Black Hawk County, Bremer County and Fayette County chapters joined with nonprofit organization Iowa Care Package to pack and send 185 care packages to U.S. soldiers overseas in April. Thrivent members rolled up their sleeves to raise money (more than \$8,000), purchase supplies and load boxes. Care packages included everything from snacks for soldiers to hot sauce to help them spice up bland meals. “It showed what we can accomplish if we put our minds together,” said Bret Trasamar, a Thrivent Financial representative from

Waterloo, Iowa. Over the past year, Thrivent members and financial representatives in the Iowa Region have assembled more than 600 packages.

Wrapping Babies in Love



DAVENPORT, IOWA—Thrivent members used their craft skills to assemble 80 baby blankets to give to newborns and their moms at the Edgerton Women’s Health Center. In the true spirit of community, not only did the members from the East Scott County, Iowa, chapter collect materials, but about 25 of them also gathered to assemble the blankets. Additional fabric was donated by a local fabric store. “The materials we received from a local fabric store were absolutely beautiful, and they even cut the pieces for us in advance so we had all the patterns matched and ready to

construct,” said Linda Kortemeyer, vice president of the East Scott County, Iowa, chapter. “The finished projects were fabulous.”

Soccer Spreads Scripture

PORTLAND, OREGON—Ascension Lutheran Church and Portland Lutheran School teamed up with the East Multnomah County Chapter of Thrivent Financial and other local businesses to host its annual weeklong “Sporting, Soaring and Scoring” soccer camp for kids. This year, 470 children attended the camp, which was also supported by The Lutheran Church—Missouri Synod Youth Ministries Servant Events Program. The East Multnomah County Chapter and a Thrivent Financial regional grant provided \$6,400 in funding for the activities connected with the camp, and Thrivent members volunteered to help. Those attending the camp received skills training, a free T-shirt and soccer ball, and even a final barbecue attended by the players and their families. The camp also included “lamb sessions,” where the young players were taught Bible stories. Each child also received a Bible to take home.

One Busy Morning



LAKE ZURICH, ILLINOIS—The Northwest Cook County–Chicago Chapter helped both local and international organizations at its fourth annual Mission Projects Day. More than 45 people participated, including chapter members, high schoolers and college students. In just one morning, the volunteers tied six quilts and made 22 sewing kits, 58 school kits and 64 baby care kits for Lutheran World Relief. They also made six blankets for Project Linus, 600 bandages for Global Health Ministries, 88 Swahili and English phrase books for children in Tanzania for Hearts in Unity, 10 gift bags for Project

Sweet Peas for families with babies in the newborn intensive care unit in the area, and three emergency sleeping bags for the homeless through the Ugly Quilt Project. The chapter donated funds to buy supplies for the projects, and the local Holiday Inn Express provided sheets to make bandages.

Gas Buydown

FT. WORTH, TEXAS – St. St. Paul Lutheran Church, Ft. Worth, and its mission church, The Summit, in Aledo, Texas, held their third annual "Gas Buydown." The Pastor and church leaders contacted a local gas station and together they created a unique program. For one hour, the price of regular gas would be reduced by 75 cents per gallon, and the church would pay for the difference. Prior to the event, church members (Thrivent members and non-members and teens) put up fliers in businesses, at a local food bank and in two lower income neighborhoods. On the day of the event, the owner decided to reduce the gas price five cents more, dropping it from \$3.86 to \$3.06 per gallon. For an hour, church members directed traffic to the pumps, washed windows, and brought free drinks to the occupants of the cars. The members also took prayer requests which they prayed over following the event. The members pumped 2,178 gallons of gas in that hour and the church's cost for their share of the gas was \$1,633. West Ft. Worth Chapter 30122 provided \$500 toward the Gas Buydown, and a Thrivent banner was prominently displayed in the front window of the gas station. People who wanted to donate money were asked to give it to a local charity.

Movie Magic



EAST BETHEL, MINNESOTA—Watch a fun movie, enjoy some popcorn and help those in need—what a great combination! The Anoka County Chapter hosted the Disney movie *Tangled*, providing a family-centered social activity while helping out the North Anoka County Emergency Food Shelf. More than 560 people attended the event at East Bethel Theatres. The generosity at the 10th annual movie event surpassed expectations; members donated 841 pounds of food and collected \$648 for the Food Shelf.

APPENDIX B

Will your plan lead you to your desired destination?

As you evaluate and refine your Chapter Plan, it may be helpful to consider the questions below to ensure that you are making the most of the opportunities and resources you have.

Based on what we have planned for the coming year...

- Are we providing experiences that will enrich the value and pride of being a Thrivent Member?
- Are we creating experiences for members to *deepen their connections* with Thrivent?
- Are there meaningful opportunities for our Thrivent Financial representatives to participate and connect with members of the local community?

Through the events and activities we have planned...

- Will guests feel welcomed and interested in learning more about Thrivent Financial?
- Will we engage people of different ages and interests?
- Are we cultivating and inspiring current and future leaders?

Are we carrying out our mission...

- To strengthen our community?
- To help others be wise with money?
- To inspire others to live generously?

APPENDIX C

Sample Board Meeting Agenda

- Welcome and Introductions
 - Please share:
 - Your name
 - Where you live
 - Your role on the board
 - What are you most excited about? What is your most pressing question or concern?

- Icebreaker

- Devotion

- The Thrivent Way*: Key Questions
 - When we think about *strengthening our community*, what comes to mind?
 - What has our chapter done in the past to strengthen our community?
 - What are the key needs in our community?
 - What stories have you heard others tell about building a stronger community?

 - What does it mean to help others *be wise with money*?
 - Why is this important?
 - How has our chapter helped others be wise with money?
 - What else could we consider doing?

 - What comes to mind when we think of *inspiring others to live generously*?
 - Who has been an inspiration *to you* to live generously? In what way?
 - How has our chapter inspired generosity in the past?
 - What else could we consider doing in the future?

- Let the planning begin!

- Wrap-up