

## **Best Practices of Planning**

Planning is the process by which people set objectives, assess the future, and develop courses of action to accomplish these objectives.

Planning is one of chapter leaders' greatest responsibilities. Goals should be realistic and meaningful to best serve your members. Your summer planning sessions should set goals and objectives for the coming year.

- Attend the CPCU Society Leadership Summit Chapter Day.
- Assemble by July chapter officers, board members, committee and task force chairs.
- Review or establish a chapter mission statement.
- Establish chapter goals.
- Delegate activities for the established goals.
- Establish a reporting or monitoring system.
- Hold regular board meetings and communicate often.
- Establish a budget for the year.
- Use the Circle of Excellence Planning checklist as a guide.
- Survey your membership to assess member needs.
- Be sure officers and committee chairmen have job descriptions and appropriate manuals.
- Develop leaders to provide succession for the chapter. Communicate with the nominating committee.
- Make this planning process part of the chapter culture every year!