

Session Guide: Planning Workshop

Use this guide to facilitate the offline planning workshop.

MATERIALS NEEDED:

- Computer or tablet
- [Planning Form](#)
- Planning Workshop Slide (facilitator only)

SESSION LENGTH:

- 45 minutes

AGENDA:

- Introduction: 3 minutes
- Fundraising: 15 minutes
- Campus-wide Actions: 20 minutes
- Closing: 7 minutes

INTRODUCTION

Welcome, everyone. During this session we're going to spend time in our chapters, planning for the year. The session will be broken up into two main parts: first, you and your chapter will have time to do a deep dive with the fundraising resources and brainstorm possible fundraisers; then, you'll brainstorm broader campus engagements using the Chapter & Club Planning Tool.

To complete this workshop, you'll need to access the planning form that was circulated ahead of the session. Only one person from each chapter needs to fill out and submit the form but everyone may want to have it open to follow along and to access relevant hyperlinks.

I'm going to give you 15 minutes to complete the fundraising part of the form and then I'll give you 20 minutes to complete the broader planning section. Jump right in!

FUNDRAISING:

Give participants approximately 15 minutes to brainstorm fundraising events.

CAMPUS-WIDE ACTIONS:

About 15 minutes have elapsed so you should be moving on to the broader campus-wide action planning part of the form.

Give participants approximately 20 minutes to brainstorm other campus-wide actions.

CLOSING:

Let's come back together. Does anyone want to share one idea that they're most excited about?

Take one or two responses.

Great! Now I want to share a few next steps.

SHARE SLIDE:

- First, be sure to have one person from your chapter submit the planning form. You'll receive a copy of your responses.
- After this session, be sure to confirm that your chapter's leadership is in place. You can access a list of suggested chapter roles on the CRS University website.
- Be sure to determine your monthly meeting times when you'll gather to plan and take action.
- You can also begin joining the monthly national conference calls. You should receive an invitation each month, along with the monthly action guide. It's preferred that your chapter attends the calls when they are broadcast live on the second Saturday of each month so that you can interact with the guest speaker. If that is not possible, recordings of the calls are available on the CRS University website.
- Finally, start taking action! Implement the plans you brainstormed today and begin taking the actions that are included in each month's action guide.

That's it for our session! Thank you for participating. If you or your chapter ever have any questions you can always reach out to your CRS regional contact.

