

 **ECHO Planning Worksheet**

* Use this template to organize your Chapter’s goals for the year.
* Track your progress and submit to RIMS by the end of 2018 for consideration for a chapter award.
* If you would like to be considered for a chapter recognition award, please **Complete 5 & 6 at the end of your year for Awards Submission and** check the box at the end of this form **for a specific Award**.
* Provide explanations to each question under the Award Category

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| #1 Chapter Mission Statement |  |  |  |  |
| Write your chapter mission statement in the space below. |
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| #2 Elevator Pitch |  |  |  |  |
| Provide a short summary of your strategy for the year.  |
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| # 3 Goals and Objectives |  |  |  |  |
| State goals and objectives in measureable terms. Goals should meet SMART criteria- Specific Measureable Actionable Relevant and Time bound. |
| Goal | Success Metric |
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| #4 Strategy/Tactics |  |  |  |  |
| Strategy/tactics should outline the plan, strategy, or tactics you will use to reach the goals and objectives set.  |
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| #5 Progress Complete by 12/31/18 |  |  |  |  |
| Track your progress. Share challenges you encountered, changes in strategy, and successes you have had along the way. |
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| #6 OUtcomeS Complete by 12/31/18 |  |  |  |  |
| Share your accomplishments. Report on goal and success metric results.  |
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Chapter Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Chapter Contact Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Primary Contact Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Primary Contact Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Check this box if you would like your chapter to be considered for an ECHO award.

Which category would you like to be considered for? ***You may submit for ONLY 1 category***

 Innovation- (Innovate RIMS by introducing a new method, idea, process, etc.)

**Provide an explanation of this innovation and what do you consider novel, unique, or innovative.**

**Would you consider this as a best practice that other RIMS Chapters might benefit from in their success? Should we change their activities to their success?**

**What did your Chapter learn from this achievement?**

 Development- (Develop RIMS by executing procedures which increase membership and**/or** the member experience)

**Provide an explanation of your membership Development and how you accomplished this goal.**

**Would you consider this as a best practice that other RIMS Chapters might benefit from in their success?**

**What did your Chapter learn from this achievement?**

 Engagement – (Engage RIMS by providing opportunities for participation and involvement)

**Provide an explanation of your engagement activities and how you achieved this goal.**

**Would you consider this as a best practice that other RIMS Chapters might benefit from in their success?**

**What did your Chapter learn from ~~this~~ accomplishing this achievement?**

 Advocacy- (Advocate RIMS through increased visibility and outreach to your local community)

**Provide an explanation of your Advocacy that increases RIMS visibility and outreach in your local community.**

**Would you consider this as a best practice that other RIMS Chapters might benefit from in their success?**

**What did your Chapter learn from this achievement?**