

Road Map to Success – All Chapter Leader Roles

Year-at-a-glance checklist to help you learn and carry out your chapter leader role

Thank you for choosing to share your time and skills as a Thrivent chapter leader. Here is a checklist of tools and resources designed to help you feel and be successful in your role. Remember, chapter leader responsibilities can be shared or overlapped to suit the needs of your own chapter leadership board. The key to the resource abbreviations listed **M/C** **T/Q** **CHIP** and their locations is located on reverse; clicking on one or any underlined term in the electronic (Word) version of this document will take you to its location online.

Tools to increase your knowledge of the role and related topics	Tasks to complete as part of the chapter leadership board
<ul style="list-style-type: none"> <input type="checkbox"/> Review the mission and vision of Thrivent Financial for Lutherans. (CHIP Search “mission”) <input type="checkbox"/> Browse the following areas in the Members/Chapters area of thrivent.com: M/C <ul style="list-style-type: none"> o For Chapter Leaders o Ask CHIP o Volunteer Resources, especially the Forms page <input type="checkbox"/> Work through the following short, easy-to-complete tutorials: T/Q <ul style="list-style-type: none"> o <i>What is a Fraternal Benefit Society?</i> o <i>Chapter Structure Overview</i> o <i>Chapter Meeting Requirements</i> o <i>Administration Overview</i> o <i>Requesting Funds and Reporting Activity Results</i> <input type="checkbox"/> If you are new, listen to the New Volunteer Leader Orientation Teleconference. Dial 888-843-8996, passcode 19543498# and view or print the accompanying presentation. T/Q <input type="checkbox"/> Attend local or regional training events provided by your LCS Team as available. <input type="checkbox"/> Review the following topics in CHIP: CHIP <ul style="list-style-type: none"> o <i>Leadership board</i> o <i>Privacy</i> o <i>Thrivent Financial logo and name</i> o <i>Co-hosting activities</i> o <i>Chapter elections</i> o <i>Recruiting volunteers</i> o <i>Volunteer leader eligibility (conflicts of interest)</i> <input type="checkbox"/> Access the Everyone Ready program to read up on volunteer topics that may interest you. M/C (For Chapter Leaders section) 	<ul style="list-style-type: none"> <input type="checkbox"/> At the first chapter meeting, the entire board may want to do/discuss the following: (CHIP Search “meetings”) <ul style="list-style-type: none"> o Schedule a regular time, date and location for chapter board meetings for the year. CHIP Search “meeting requirements” o Review or create a chapter mission statement. o Develop chapter goals based on the chapter’s mission and Thrivent Financial’s mission and vision. o Review/establish guidelines on how the board will handle funding requests. CHIP Search “guidelines booklet” o Discuss the roles of each of the chapter leaders and plan who will do what in the coming year. T/Q Responsibilities of Leadership Board o Schedule events for the year such as Join Hands Day. CHIP Search “join hands day,” T/Q Calendar of Key Dates o (At every meeting) ask for updates on service teams with activities planned or in progress. <input type="checkbox"/> Register for a user ID and password to access the Chapter Leadership Administration Menu online. See <i>Registering on Thrivent Financial’s Web Site</i> T/Q quick-reference guide for details. <input type="checkbox"/> Print <i>Calendar of Key Dates</i>. T/Q <input type="checkbox"/> Read the monthly Chapter News e-mails and periodic e-mails from your Lutheran Community Services Team and Thrivent Financial. <input type="checkbox"/> Be on the lookout for people who might be good additions to the board. Begin recruiting them by having conversations about being a chapter leader. T/Q Quick Guide to Chapter Leadership Board Roles <input type="checkbox"/> Actively recruit chapter leadership board members for next year. T/Q Recruiting Chapter Leaders and Congregational Coordinators <input type="checkbox"/> If leaving your position at the end of the term, prepare and pass along helpful information based on your experiences and the various resources to aid the transition of the new person in the role. CHIP Search “transition” <p>⇒ See <i>Understanding Your Role</i> guides for details on role-related tasks and specific resources. T/Q</p>

Key – (From thrivent.com, Members/Chapters)

T/Q [Tutorials/Quick References](#)—tools for learning. Click on For Chapter Leaders, Tutorials/Quick References.

M/C [Members/Chapters](#)—resources for members and volunteers.

CHIP [Chapter Information Place](#)—online chapter reference guide. Click on Ask CHIP.

Questions? The Fraternal Service Center staff is available to answer your chapter-related questions.

- Call **800-236-3736** Mon. & Tues. 7 a.m. – 9 p.m. Central time, Wed. – Fri. 7 a.m. – 6 p.m. Central time, or leave a message any time of day.
- Send an e-mail to fraternal@thrivent.com. You will receive a response by the next business day.

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