

## Road Map to Success – Chapter Records Director

### *Year-at-a-glance checklist to help you learn and perform 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; **also see the “all roles” checklist** for items that apply to all chapter leadership board roles. 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 at the bottom of this page; 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 your role
<ul style="list-style-type: none"> <li><input type="checkbox"/> Review the <a href="#">mission and vision</a> of Thrivent Financial for Lutherans. (CHIP Search “mission”)</li> <li><input type="checkbox"/> Review the <i>Understanding Your Role – Records Director</i> T/Q quick-reference guide for details about your role.</li> <li><input type="checkbox"/> Browse the following areas in the <a href="#">Members/Chapters</a> area of <a href="#">thrivent.com</a>: M/C               <ul style="list-style-type: none"> <li>o <a href="#">For Chapter Leaders</a></li> <li>o <a href="#">Ask CHIP</a></li> <li>o <a href="#">Volunteer Resources</a>, especially the <a href="#">Forms</a> page</li> </ul> </li> <li><input type="checkbox"/> If you are new, listen to the New Volunteer Leader Orientation Teleconference. Dial <b>888-843-8996</b>, passcode <b>19543498#</b> and view or print the accompanying presentation. T/Q</li> <li><input type="checkbox"/> Work through the following short, easy-to-complete <a href="#">tutorials</a>: T/Q               <ul style="list-style-type: none"> <li>o <i>What is a Fraternal Benefit Society?</i></li> <li>o <i>Chapter Structure Overview</i></li> </ul> </li> <li><input type="checkbox"/> Attend local or regional training events provided by your LCS Team as available.</li> <li><input type="checkbox"/> Review the following topics in <a href="#">CHIP</a>: CHIP               <ul style="list-style-type: none"> <li>o <i>Privacy</i></li> <li>o <i>Thrivent Financial Logo and Name</i></li> <li>o <i>Co-hosting activities</i></li> <li>o <i>Agenda/minutes</i></li> <li>o <i>Reporting requirements</i></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li><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.</li> <li><input type="checkbox"/> Print <i>Calendar of Key Dates</i>. T/Q</li> <li><input type="checkbox"/> Update your chapter’s Web site administrator(s) and contact person. CHIP Search “web sites”</li> <li><input type="checkbox"/> Read the monthly Chapter News e-mails and periodic e-mails from your Lutheran Community Services Team and Thrivent Financial.</li> <li><input type="checkbox"/> Record and retain minutes at each chapter meeting. CHIP Search “minutes”</li> <li><input type="checkbox"/> Report each chapter meeting online. CHIP Search “reporting”</li> <li><input type="checkbox"/> Establish and maintain the chapter’s planning calendar for the year.</li> <li><input type="checkbox"/> Become familiar with the steps for requesting, changing and reporting Care Abounds in Communities® activities. CHIP Search “care abounds in communities”</li> </ul> <p>⇒ See <i>Understanding Your Role</i> guide for details on these and other 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](mailto:fraternal@thrivent.com). You will receive a response by the next business day.