

Getting Started

This **Chapter Leader Materials** binder is a tool to help organize materials needed in your role as a chapter leader. This “empty binder” concept is meant to allow you to customize it as you see fit. The tabs are guides to the types of information you might use in your chapter leadership meetings and as you perform your role.

This binder has both pre-printed and blank tabs for your use. Behind each printed tab is a brief overview of what was intended for that tab and some useful tips. Also included are instructions as to where the information can be found on the Internet. If you don't have access to the Internet, work with one of your chapter leaders who has access, or visit your local library.

To get started:

- ✓ You will need a user ID and password to work as a chapter leader in the Chapter Leadership Administration system on www.thrivent.com. This user ID and password allow you to request funds, report activities, order supplies and much more.
- ✓ To register, go to www.thrivent.com and click **Register** in the box on the upper right side of the page and follow the prompts. *Note: If you've already registered on Thrivent.com to view your personal accounts, there is no need to register again.*

Note: All elected positions serve a one-year term beginning Jan. 1 (or whenever appointed) and end Dec. 31. Members may serve in elected leadership board positions for a maximum of four consecutive terms. If a member serves four consecutive terms, that member is required to take a one-year break before serving again in an elected position.

When leaving the board, this **Chapter Leader Materials** binder is meant to be passed on to your successor.

Thank you!



To Do:

Online information: [Thrivent.com](http://www.thrivent.com) > Member Involvement > Member Leader Resources:

- **Leadership Roles** and **Programs & Activities** to learn more about the chapter system, your role as a member leader and chapter programs.
- **Tools & Resources**, which has forms, templates and quick reference guides you'll use in your work.
- **Communication & Promotion** to help promote your events and create awareness.
- **Member Leader News** for latest information to help you in your role.
- **Chapter Calendar** to view deadlines and dates important to your role (located under *Leadership Roles* in the *Chapter Leadership Board* section).

Chapter Leadership Board

Each chapter will have a leadership board that provides direction and leadership to the chapter members. Thrivent Financial members who are members of the chapter will elect these leaders.

Responsibilities

- ✓ Be an ambassador for Thrivent Financial; reach out and involve more people in chapter activities.
- ✓ Support and partner with congregational advocates to see Thrivent Financial's mission and the mission of the congregations being fulfilled.
- ✓ Promote Thrivent Choice® among chapter members at local chapter events and in congregations, and approve local organizations that enroll as Thrivent Choice recipients.
- ✓ Inform chapter members and others of upcoming activities using a variety of tools (e.g., Chapter Mailing System, bulletin inserts, etc.). Promote the activities and encourage participation.
- ✓ Meet **as often as necessary** to remain a viable, active chapter—quarterly at a minimum (in person or aided by technology). Many will want to meet monthly to review planned activities and activity requests in a timely manner.
- ✓ Recruit new members to the chapter board and hold annual local chapter leader elections. Consider staggering their terms so that the board has continuous experience and all leaders' terms don't expire at the same time. Determine the number of leaders the board needs (five minimum) and recruit for these positions.
- ✓ Review and approve Care Abounds in Communities® chapter activity funding requests.
- ✓ Recognize volunteers.
- ✓ Order chapter supplies and create chapter communications as necessary.

Highlights

- ✓ 10 elected board positions; 3 required positions include President, Records Director and Financial Director (need a minimum of five board positions filled) – must be from different households and must be a member of the chapter in which they've been elected.
- ✓ Leaders must be a Thrivent Financial benefit or associate member (age 16 or older).
- ✓ All positions serve a one year term (term ending Dec. 31) and can serve four consecutive terms.
- ✓ Each chapter leader's name, address, phone number and e-mail address may be available through a public page on the internet.
- ✓ A valid e-mail address and internet access is required for the Records Director and Financial Director and is recommended for all positions.

Agendas/Minutes

Great meetings don't just happen — they're designed. You think about your meeting, plan it, design it and conduct it. You can use the **Chapter Meeting Planner** form (see 'To Do' section below) to help design your meeting. Sample agenda items and meeting guidelines include:

- Meet as often as necessary to remain a viable, active chapter – quarterly at a minimum. Thrivent chapters are legally required to meet at least once every three months.
- Previous meeting minutes should be reviewed and approved at the next meeting.
 - When recording minutes, remember confidentiality must be maintained. When discussing an activity for a recipient, you may not want to include the details of recipient's situation.
- A financial update may be presented by the financial director. The update could include:
 - Beginning and ending balance in chapter checking account.
 - List of checks written and deposits made.
 - Operating funds balance.
- Each leader should have the opportunity to present an update, as needed.
- New chapter members must be accepted into membership at each meeting.
- Use the Purpose-Driven Definitions to provide clarity on what's appropriate for using tax-exemption funds. (see below)
- Minutes need to be kept for seven years. If you enter your minutes online in the Chapter Leadership Administration system, the minutes will automatically be kept for your chapter (see below).
- When recording the minutes, focus on three categories of information:
 - Decisions reached (including a decision for each activity submitted to the board).
 - Action items that people need to follow up on.
 - Open issues.



To Do:

Online information: Thrivent.com > Member Involvement > Member Leader Resources:

- **Meetings**
 - Information on planning, conducting, taking minutes and reporting non-meeting administrative hours.
 - **Tools & Resources > Meetings:** download and print the Chapter Meeting Planner.
- **Chapter Leadership Administration System** — Use to:
 - Order chapter supplies
 - Manage chapter meeting minutes—to enter the minutes online.
 - Report Locally Supported Activity results—to report additional volunteer/administrative hours.
- **Tools & Resources > Programs & Activities > Quick Reference Guides**
 - Access the Purpose Driven Definitions Knowledge Aid to help your board use tax exemption funds wisely.

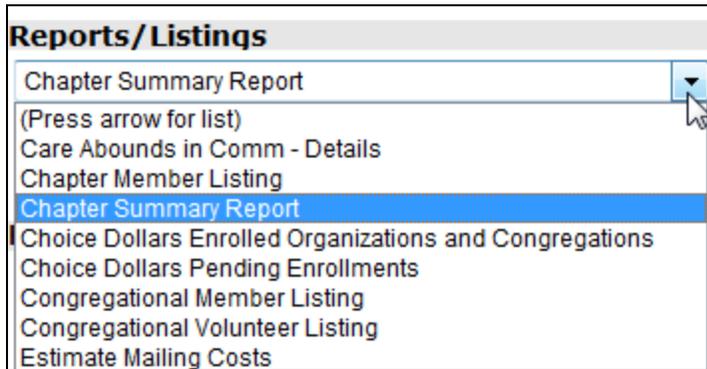
Financial Reports

The chapter leadership board has a checking account at Thrivent Federal Credit Union. Chapters receive operating funds each year to support the chapter to cover administrative expenses. All transactions must be categorized online in the Manage Income and Expenses screens on your Chapter Leadership Administration system. (see below).

In addition, chapters can access Care Abounds in Communities® program funds online. For more information about the overall funding process, go to the Care Abounds in Communities area on Thrivent.com (see below).

Financial updates should be provided at the leadership board meetings. All financial decisions should be approved by the chapter leadership board.

Note: To help with the year-end audit process, financial directors are encouraged to review the **Chapter Summary Report**. This report will be available in February and is located in the Chapter Leadership Administration system, Reports/Listings, Chapter Summary Report.



To Do:

For online information: Thrivent.com > Member Involvement > Member Leader Resources:

- **Leadership Roles > Chapter Leadership Board**—information about your role and the chapter.
- **Programs & Activities > Programs > Care Abounds in Communities®**—details and guidelines about the funding process.
- **Chapter Leadership Administration system**—Reports/Listings, Chapter Summary Report, Manage Income and Expenses.
- **Finances & Funding** details about operating funds, financial information (managing income and expenses, Chapter Summary Report, tax deductions, donations, etc.), and much more.

For online banking: Go to www.thriventcu.com/bank—**Online Banking**



Chapter Programs, Workshops and Materials

Care Abounds in Communities®

The Care Abounds in Communities program supports activities conducted by Thrivent Financial members to help individuals, families, local communities and not-for-profit organizations including congregations. *Tip: Reference the Purpose-driven Definitions as your board makes funding decisions.*

Chapter materials and supplies such as posters and bulletin inserts can be printed from the website (see below).

Thrivent Choice®

Thrivent Choice® lets members recommend where some of Thrivent Financial's charitable outreach funds go by directing Choice DollarsSM.

Tools and resources that will help chapter leaders, congregational advocates and organizations promote the Thrivent Choice® program to their constituents are available online (see below).

Educational Workshops

Chapters are encouraged to conduct educational activities to attract and involve more members. By educating our members, they are able to make more informed decisions, be wise with money and are inspired to live generously.

Member Social Activities

A chapter member social activity brings **Thrivent Financial members and their personal guests** together to strengthen relationships among members.

Member social activities provide chapters with another opportunity to attract and involve more members.

Details and tools about the eligible chapter educational workshops and member social activities are available online (see below).



To Do:

For online information: Thrivent.com > Member Involvement > Member Leader Resources:

- **Care Abounds in Communities®**—learn more about this program at Thrivent.com > Member Involvement > Member Leader Resources > Programs & Activities > Programs.
- **Thrivent Choice®**—program details, and tools and resources (fact sheet, FAQs, tutorial, bulletin inserts, flyers, posters) at Thrivent.com > Member Involvement > Member Leader Resources > Programs & Activities > Programs.
- **Chapter Leadership Administration system**—see Order Chapter Supplies for additional chapter program resources.
- **Programs & Activities > Activities**—information on educational workshops and member social activities.

Chapter Communication/Promotion

Communicating and promoting your chapter and its activities to chapter members, congregations and communities is important, and encourages participation in chapter activities. There are many different tools available to you to help you:

- **Chapter Mailing Service** (2-page or 4-page newsletter, post card)—Send various types of mailings to members of your chapter.
- **Bulletin insert**—Promote chapter activities in local congregations.
- **Flyer**—Post or leave behind anywhere. Provides space for a little more information.
- **Find Events and Workshops** (on Thrivent.com)—Register your chapter event on Thrivent.com to reach a larger audience in your area.
- **Local newspaper ad**—A great way to reach out to your local community.
- **Calling tree/personal ask**—Personally inviting someone to an event encourages their attendance.

Your chapter may have other great ideas for communicating with members and others about the activities of your chapter.

MEMBERS MAKE A DIFFERENCE

Colorado-Fayette County Chapter

Activity: Members Family Christmas Party!
Date: Friday, December 1, 2012
Time: 6:30 p.m. - Games, Santa, Snacks, Fun until 8:00 p.m.
Place: St. Johns Lutheran Church, Plymouth in the Cafeteria
 3453 Express Way
Contact: Call Dwight Schmidt or Sharon Stone to RSVP
 Schmidt: 920-453-7244 / Stone: 234-232-8585

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Sample Chapter Activity Postcard

Missouri

If you don't see a workshop that you're looking for in your area, you can [request a workshop](#).

Sort by: [Date](#) | [City](#) | Event Type

Details	Kirkwood	December 5, 2010	Charitable Event
Basket of Hope Christmas Packing Event			
Details	Cole Camp	November 29, 2010	Workshop
Economic and Investment Outlook			
Details	Saint Peters		Thrivent Builds Homes
Thrivent Builds Homes			

Sample Find Events & Workshops page on Thrivent.com

To Do:



For online information: Thrivent.com > Member Involvement > Member Leader Resources:

- **Chapter Leadership Administration system** (Leadership Roles > Member Leadership Administration Systems), Manage Chapter Newsletters to access this service.
- **Communication & Promotion** for information, tools & resources, including bulletins, emails, Chapter Mailing Service, promotion, supplies and logo use.

Online Reporting

Located on Member Leader Resources > Leadership Roles > Member Leadership Administration Systems > Chapter Leadership Administration System, this tool is for chapter leaders to perform their administrative responsibilities. Chapter leaders can view chapter activities, report and request or change funding requests, order chapter supplies, request and produce newsletters, manage income and expenses and much more.

Chapter Leadership Administration

This is the **home page** for chapter leaders to perform their administrative responsibilities.

Outagamie County Chapter of Thrivent Financial
Chapter Number: 30080
EAST WI & UPPER MI
Regional Financial Office Number: 361

Chapter Number:

Chapter Name:

Chapter Details

View Details About This Chapter

- ▶ [Current Chapter Leadership Board](#)
- ▶ [Chapter Leadership Board History](#)
- ▶ [Current Congregational Volunteers by Congregation](#)
- ▶ [Congregational Volunteer History by Congregation](#)
- ▶ [Community Engagement Team](#)
- ▶ View Care Abounds in Communities Program Funds Available

Chapter Leader/Congregational Volunteer Tasks

- ▶ [Manage Chapter Leaders](#)
- ▶ [Manage Congregational Volunteers](#)
- ▶ Manage Chapter Meeting Minutes
- ▶ [Manage Chapter Announcements](#)

Supplies

- ▶ [Order Chapter Supplies](#)

Chapter Financial Reporting

- ▶ [Manage Chapter Income and Expenses \(2013 and later transactions\)](#)
- ▶ Manage Chapter Operating Funds

Activity Tasks

- ▶ [Request for Care Program Activity Funding \(with or without pre-funding\)](#)
- ▶ [Report Care Program Activity Results \(activities supported with Care Program Funds\)](#)
- ▶ [Withdraw Activity](#)
- ▶ [Change Funding Request Amount](#)
- ▶ [Record/Update Donations](#)
- ▶ Report Locally Supported Activity Results (e.g. educational workshops, member socials, charitable activities, meetings, elections, Join Hands Day, etc.)
- ▶ View Activities

Mailing

- ▶ [Estimate Mailing Costs](#)
- ▶ [Manage Chapter Newsletters](#) (leaders only)

Reports/Listings

- ▶ [Chapter Dashboard](#)

Quick Reference

Use this area to store helpful quick reference guides and other useful resources. *Tip: Update printed materials at least once per year to assure that you have the most recent information.*



To Do:

For online information: Thrivent.com > Member Involvement > Member Leader Resources:

- **Chapter Leadership Administration system**
- **Care Abounds in Communities®**
- **Thrivent Choice®**
- **Finances & Funding** for information and quick reference guides, including information on managing income and expenses.
- **Programs & Activities > Activities** for information on locally supported activities.

Resources

There are many resources available at Thrivent.com > Member Involvement > Member Leader Resources to help make your chapter leader role as easy as possible.

MyThrivent | Products & Services | Tools & Planning | Membership & Benefits | **Member Involvement** | Log in to accounts... | Forgot: [ID](#) | [Password](#) | [Register now](#) for account access.

[Member Involvement](#) > [Member Leader Resources](#)

Member Leader Resources

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Member Leader Resources

As a chapter leader, a congregational advocate or a Thrivent Builds leader, you play a key role in making a difference in your community. From setting annual goals to organizing service projects or educational workshops, you have the ability to make a real difference. It doesn't matter if you're new to your role or you've been involved for years – this section is for you.

[Member Leader News](#)
Stay up to date on the latest news for Chapter Leaders and Congregational Advocates.

[Leadership Roles](#)
Learn about the various leadership roles within each chapter, including congregational advocates and Thrivent Builds leaders.

[Programs & Activities](#)
Whether your chapter is supporting people in need, helping people be wise with money or sponsoring a social event, you'll find useful tools and resources.

[Communication & Promotion](#)
Discover ways to get the word out in your community about what your chapter is doing.

[Finances & Funding](#)
How to manage your chapter's budget, comply with important tax responsibilities and provide year-end documentation.

[Meetings](#)
From setting an agenda to recording minutes, make the most of your chapter.

[Elections](#)
Everything you need to know about recruiting new leaders, conducting annual elections and reporting results.

Administration Systems Login
Log in to your role specific site to complete various administrative tasks.

- [Chapter Leadership Administration System](#)
- [Congregational Volunteer Administration System](#)
- [Thrivent Builds Leaders Only System](#)

I Want To

Find a Representative
ZIP Code

Locate a Chapter
ZIP Code

SECURE AT SCHOOL?
Help protect your identity.

Questions?

To speak with a staff member, call **800-847-4836** and say "fraternal". Or email fraternal@thrivent.com.

To Do:

For online information: Thrivent.com > Member Involvement > Member Leader Resources:

- **Leadership Roles** and **Programs & Activities** to learn more about the chapter system, your role as a member leader and chapter programs.
- **Member Leader News** for the latest information to help you in your role.
- **Policies & Guidelines** for general information pertaining to chapter business.
- **Tools & Resources** for a list of forms, templates and quick reference guides. to assist you in your role.

