



**THRIVENT
FINANCIAL®**

Connecting faith & finances for good.™

THRIVENT CHOICE

A GUIDE FOR REVIEWING ORGANIZATIONS



Introduction

Giving back has always been important to Thrivent Financial and its members. Through Thrivent's member-advised charitable grant program, Thrivent Choice®, eligible members can recommend where some of Thrivent's charitable outreach funds are distributed by directing Choice Dollars®.

Thrivent Choice is a joint program of Thrivent and its local branches. As representatives of all members within your local branch (e.g., chapter, Thrivent Community or Thrivent Member Network), the leadership board must take into account the views of all members within the local branch when reviewing and making decisions on the nominated organizations. On the following pages, more details are provided about the roles and responsibilities of the leadership board.

Eligibility Requirements

The Thrivent corporate office ensures that the organizations sent to the leadership boards for review meet the eligibility requirements. To be considered eligible, the organization must:

- Be an incorporated, nonprofit organization that is exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code.
- Be domiciled in and provide services in the U.S.
- Be able to receive Choice Dollars grant funds through electronic funds transfers (EFT).
- Agree and comply with the Terms and Conditions of the Thrivent Choice program for organizations and any changes to these Terms and Conditions.

A close-up look at grant recipient eligibility criteria

Organizations must meet certain criteria to be considered for enrollment as Choice Dollars grant funds recipient organizations. In order for organizations to be considered, they must be nominated by a Thrivent benefit member (a benefit member does this by completing an online recommendation form).

If Thrivent determines that the organization meets the eligibility criteria, the organization is invited to apply for enrollment. **(Meeting the eligibility criteria does not guarantee that an organization will be approved for participation.)**

A benefit member is someone who:

- Meets membership eligibility, has been admitted for membership, and has a qualified connection to a Thrivent insurance or annuity product or received a settlement agreement from such insurance.
- Is age 16 or older.

If the organization applies, Thrivent corporate office completes the review/vetting process and the organization is added to the *Choice Dollars Pending Enrollments* report. The report is made available to local branch leaders to review and includes the following information:

- The name and address of organizations that have been nominated by one or more members of the local branch and have gone through the initial eligibility check by Thrivent.
NOTE: The organizations may or may not be physically located within the boundaries of the local branch.
- The name and email address of the member who nominated the organization.
- The date by which the leadership board needs to make a decision.

An email is sent to the president and records director of a Thrivent chapter or the chair and records officer of a Thrivent Community when they need to review and make decisions on organizations that have been added to the *Choice Dollars Pending Enrollments* report. Instructions for how to access the report are included in the email.



Thrivent Choice Dollars Organization Enrollment Process

Your roles and responsibilities

Leadership boards of local branches play a critical role in reviewing and making decisions about the organizations that have been nominated by members of their local branch.

- An email notification is sent when new organizations have been added to the *Choice Dollars Pending Enrollment* report, which requires the leadership board's review and decision.
- The leadership board should review and make decisions about organizations that have been nominated for enrollment **no later than the date listed in the "Needs Approval By" column on the report.**
- If the leadership board does not provide a response by the approval date, the organizations listed on the report are assumed approved and will be included in the program's searchable online catalog.





Organizations appearing on the *Choice Dollars Pending Enrollments* report (see example at right) may or may not be physically located within the boundaries of your local branch. They have been nominated for enrollment by one or more members of your local branch, so your leadership board is required to review and make decisions on the nominations.

Review and Decision-Making Process

Step One—Access the *Choice Dollars Pending Enrollments* report

Thrivent member leaders

The report is updated every Friday. Thrivent member leaders can view and print the *Choice Dollars Pending Enrollments* report from the **Reports/Listings** area of the Chapter Leadership Administration Menu. To access this report:

- Go to Thrivent.com and click on **Member Involvement**.
- Select **Member Leader Resources > Chapter Leader Administration System** and log in.
Note: *If this is your first time logging in to the Administration Menu, you must complete a short one-time registration.*
- On the Chapter Leadership Administration page, under Reports/Listings:
 - Make sure the current year is selected.
 - Click on the down arrow, select *Choice Dollars Pending Enrollments* and click **Go**.

Thrivent Community and Thrivent Member Network leaders

The *Choice Dollars Pending Enrollments* report will be provided to Thrivent Community leadership board members via email whenever there are organizations that need to be reviewed. Thrivent Member Network board members can access the report via the SAS portal. Instructions for accessing this report have been provided to each board's secretary.

**Chapter 30000 - Thrivent Choice
Pending Enrollments
As of run date: Run Date: August 6, 2012**

Note: Organizations and Congregations appearing on this report may or may not be physically located within the boundaries of your Thrivent chapter or chartered Thrivent FR community. These organizations and congregations have been nominated as Choice Dollars grant funds recipient organizations by one or more members of your chapter/community and are now requiring your review and decision. If you have questions about an organization or congregation on this report, please reach out to the sponsoring Thrivent member for further information.

Organization/ Congregation Name	Address	City	State	Organization Phone	Organization Web Address	Sponsoring Member Name	Sponsoring Member email	Needs Approval By
St Thomas Lutheran Church	9393 Church Rd	Grosse Ile	MI	(734) 675-0005				
Transfiguration Lutheran Church	8250 Pardee Rd	Taylor	MI	(313) 291-2277				
Trinity Lutheran Church	465 Oak St	Wyandotte	MI	(734) 282-5877				

Step Two—Conduct the Review

It's best for the member leaders to meet face-to-face to discuss and review the organizations on the *Choice Dollars Pending Enrollments* report. If this isn't possible, leaders may hold this meeting via teleconference (see *Member Leader Resources* for more details on teleconferencing). An email exchange, including the entire leadership board, is a last resort.

When reviewing the report, pay particular attention to the “**Needs Approval By**” dates. It is up to the leadership board to determine the process it will use to make its decisions. Since Thrivent already determined that the nominated organizations met eligibility requirements before they were included on the report, **the leadership board can presume that the organizations listed meet eligibility requirements** (unless it has information indicating otherwise). Your leadership board is not required to investigate the nominated organizations, but may want to reach out to the member who nominated the organization for additional information.

Keep in mind that member leaders, as representatives of all members within the local branch, should take into account all members' views when reviewing and making decisions about an organization's application.



Step Three—Approve or Deny Enrollment

Approving organizations

If the leadership board approves the organization for enrollment:

- **No other action is necessary.** The organization will be approved for enrollment **35 days** after the review notification email is sent and will be listed in the Choice Dollars searchable online catalog within one week.
- To expedite the approval process, a member leader should send an email to mail@thrivent.com with the following information:
 - “Thrivent Choice Approval” as the subject line.
 - The name and number of your local branch (e.g., chapter, Thrivent Community or Thrivent Member Network).
 - The name and address of the organization the leadership board approved.
- Record all approvals in the meeting minutes.

Note: If a leadership board approves an organization as a Choice Dollars grant funds recipient organization but later discovers that it has ceased to meet one or more of the eligibility requirements or learns of other circumstances that it believes are serious enough to disqualify the organization from receiving Choice Dollars grant funds (see examples below), the leadership board should report this information to Thrivent via email to mail@thrivent.com.

Examples:

- An organization is in the process of ceasing operations or has been found by local authorities to be misusing donated funds.
- An organization is no longer a 501(c)(3).



Denying organizations

If the leadership board determines the organization should not be approved:

- A member leader from the local branch needs to send an email to mail@thrivent.com no later than the **“Needs Approval By”** date listed on the *Choice Dollars Pending Enrollments* report. The email must include the following information:
 - “Thrivent Choice Denial” as the subject line.
 - The name and number of your local branch (e.g., chapter, Thrivent Community or Thrivent Member Network).
 - The name and address of the organization the leadership board did not approve.
 - The reason the leadership board has denied the organization.
- Record all denials in the meeting minutes.

If the leadership board does not provide a response by the **“Needs Approval By”** date, the organization is deemed to have been approved and will be listed in the Choice Dollars searchable online catalog. Updates to the catalog are made within one week of approval.

- Thrivent may deny enrollment of an organization that was previously approved by a local branch leadership board if it later determines the organization no longer meets program eligibility criteria. Subject to the Terms and Conditions, Thrivent may also terminate the eligibility of an organization to receive funds through the Choice Dollars part of the Thrivent Choice program at any time and for any reason, with or without notice to the organization.

QUESTIONS—If you have any questions about Thrivent Choice, please contact a Customer Care Professional from the Member Connection Center at 800-THRIVENT (800-847-4836) and say **“Thrivent Choice®”** at the prompt or send an email to mail@thrivent.com.



Visit Thrivent.com/choicedollars for the complete
Terms and Conditions for directing Choice Dollars®.



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