



CONGREGATIONAL ADVOCATE TRAINING FACILITATOR GUIDE

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Introduction

This guide is intended to be used to facilitate the initial training for new congregational advocates. The way in which this training occurs varies considerably across the country. In some places, congregational advocates are able to meet face-to-face while in other areas, the most viable option for meeting is via teleconference.

Therefore, it is important that the facilitator adapt the content of the training session in a way that most effectively meets the needs of congregational advocates. For example, the Getting Started session is estimated to take 90 minutes—very reasonable if you’re meeting in person, but perhaps less desirable if you’re meeting via teleconference! In that case, you might decide to cover some of the content at a later time. As the facilitator, you’ll need to decide what will work best for your participants, and flexibility is a key consideration.

Preparation

- Read through this Facilitator Guide and review the related documents to become comfortable with the content.
- Don’t feel that you need to “stick to the script” included in this Facilitator Guide. Cover the key points, but feel free to put concepts and ideas into your own words.
- If you have less than the suggested time for your session, determine what you will cover at a later time—e.g., the Thrivent Choice and/or Educational Workshop topics.
- If you have the luxury of more time, decide which topics could warrant additional time and allow for more discussion during the session.
- Keep in mind that the times indicated in each section are just suggestions. You might choose to spend more or less time in a particular area, depending on the questions from participants and/or the nature of the conversation taking place.
- Be prepared to enrich this training by sharing your own examples and stories!

Part 1: Getting Started

Objective: To help individuals gain an understanding of the congregational advocate role and feel confident and prepared to take their first steps as a congregational advocate.

Estimated session time: 90 minutes

Outline:

- Setting the Stage 15 minutes
 - Who Is Thrivent Financial? 20 minutes
 - Your Role as a Congregational Advocate 25 minutes
 - Connecting With Church Leaders 20 minutes
 - Wrapping Up..... 10 minutes
-
- 90 minutes

Setting the Stage (15 minutes)

Topics Covered:

- Welcome
- Introductions
- Session objectives

Welcome:

Welcome new congregational advocates and thank them for their willingness to take on this important leadership role.

Introductions:

Introduce yourself and provide a little background, including why you are excited about the congregational advocate role!

Ask participants to introduce themselves by briefly sharing:

- Their name.
- The name and location of their church.
- Why they decided to become a congregational advocate.
- One thing they're excited about; one thing they have questions or concerns about.

Session objectives:

Assure participants that this session is just one component of congregational advocate training! Communication, training and support will be ongoing.

Encourage them to take the time to review the Member Leader Training webinar mentioned in the letter they received when they enrolled as Congregational Advocates. It is found under the Member Involvement tab under Member Leader, by clicking on the link for Member Leader Training.

▶ The objectives of this session are:

- To help you gain a better understanding of your role and how your church can benefit from the resources Thrivent has to offer.
- To equip you so that you feel confident enough to take a few initial steps as a congregational advocate.

Specifically, we’re going to talk about three topics today: (1) some background on Thrivent Financial; (2) an overview of the congregational advocate role; and (3) how you can connect with church leaders to learn more about the needs of your church.

Ask participants if they have any questions before you continue.

Who Is Thrivent Financial? (20 minutes)	
Topics Covered:	Materials Needed:
<ul style="list-style-type: none"> • Organization background • What makes us unique • Benefits of membership • <i>The Thrivent Way</i> 	<ul style="list-style-type: none"> • <i>Money, Faith and You</i> (#30000) • <i>Benefits of Membership</i> flyer (#30010) • Mission/Vision bookmark (#33121)

Objectives:

Share a brief overview of Thrivent’s history to develop an understanding of our organization’s roots and unique advantages as a fraternal benefit society.

Provide an overview of the membership benefits offered and where to learn more.

Introduce *The Thrivent Way*: What it is. How it can be carried out through the role of the congregational advocate.

Organization background/what makes us unique:

Provide a brief overview of Thrivent Financial's history and what it means to be a Fraternal Benefit Society:

- ▶ At the beginning of the 20th century, two grassroots groups—German Lutheran immigrants (in Appleton, WI) and Norwegian Lutheran immigrants (in Minneapolis, MN)—were concerned about the security and well-being of their fellow Lutherans.

Each group started a fraternal benefit society that would help Lutherans protect their families with affordable life insurance.

Ask participants: Have you heard the term, “fraternal benefit society?” Do you know what it means? Pause briefly to get an idea of participant awareness/understanding of this concept.

- ▶ Fraternal benefit societies were formed so people with a common bond—typically religious, ethnic or occupational—could help one another when tragedy struck.

They also provided opportunities for people to socialize. Members belonged to local ‘lodges’ or meeting places where they could come together as a community and celebrate their common bond.

Thrivent Financial is a fraternal benefit society. We have a lodge system, and our members belong to a local chapter or Thrivent Member Network.

As a not-for-profit organization, the money that Thrivent would otherwise pay in taxes on our core products—Thrivent life and disability insurance, and Thrivent annuities—is used for programs that support giving back to the community, and help our members to live secure and generous lives.

Ask participants to pull out the *What Makes Us Different Makes Us Strong* information sheet. Highlight some of the facts and the information that can be found on it.

- ▶ Thrivent Financial is the largest fraternal benefit society in the United States. We have a century of strength and stability under our belts, and we are a Fortune 500 financial services organization.

But we're even more than this: We're a faith-based, membership organization. We have a unique ability to work with and through our members to carry out our mission of strengthening Christian communities by helping members be wise with money and inspiring them to live generously.

Benefits of membership:

Introduce the value of membership and how to learn more:

- ▶ As a membership organization, our members are our owners. We strive to offer and continually enhance the benefits of being a member by:

Providing products and services that are designed to meet needs in every stage of life (protection, accumulation of assets, retirement).

Creating opportunities for volunteerism, education and member social events.

Offering membership benefits in the form of resources, charitable giving programs, financial assistance benefits and discounts.

As a congregational advocate, you'll have opportunities to explain to members and prospective members what Thrivent, as a membership organization of Christians, has to offer. So you'll want to become familiar with the benefits of membership.

Ask participants to pull out the *Benefits of Membership* flyer. Refer to the information it contains and explain that they can learn more by visiting **Thrivent.com>Membership Benefits**. Also tell them that this document is available to order as a resource for their role.

The Thrivent Way:

Note: This section is intended to introduce congregational advocates to *The Thrivent Way* and to engage them in reflection and discussion. Keep in mind that there could be many different responses to the questions you pose. This will make for a rich conversation!

- ▶ Thrivent's mission and vision are expressed as *The Thrivent Way*.

The Thrivent Way guides us and helps us make decisions by specifically saying who we are, what our purpose is, and what we will do.

Let's take a look at the Mission and Vision bookmark to learn more.

Refer participants to the Mission and Vision bookmark in their Resource Guide. Read—or ask a volunteer to read—each section of *The Thrivent Way*.

Engage participants in a conversation using the following questions to prompt discussion:

- ▶ What does it mean to you for people to be *wise with money*?
 - Who has inspired you to be generous? In what way?
 - How can you, as a congregational advocate, help Thrivent members be wise with money?
 - What role can you play in helping others to live generously?
 - What would your community look like if people were wiser with money and if they were more generous?

Your Role as a Congregational Advocate (25 minutes)

Topics Covered:	Materials Needed:
<ul style="list-style-type: none">• Purpose• Connecting• Learning• Communicating• The “Team” Concept	<ul style="list-style-type: none">• <i>Understanding Your Role</i> (#26345)

Purpose of the congregational advocate role:

Provide an overview of the congregational advocate role. (Draw upon what participants said in their introductions—e.g., wanting to make a difference in their church; being passionate about carrying out their church’s ministries; wanting to help fellow members become more financially secure; etc.)

Share the *Understanding Your Role* document (in section 1 of the Resource Guide) with participants.

Refer to the graphic and make the point that this provides a good illustration of what they’ll be doing as congregational advocates: connecting, learning and communicating.

Connecting:

- ▶ You were asked to consider becoming a congregational advocate because someone recognized that making connections and building relationships comes naturally to you. And as a congregational advocate, you’ll connect with a variety of people—Thrivent members, church leaders, Thrivent Financial representatives, community leaders, etc.

What are some ways that you build relationships? (*Pause and allow for discussion.*)

Learning:

- ▶ A key part of your role is to learn about your church’s needs and ministries. The document provides a few ideas, but I’m curious as to other ideas you might have. (*Ask if anyone would be willing to share their thoughts on this. If needed, ask questions to prompt discussion—e.g., Who might you talk with? What kinds of questions could you ask?*)

In addition to learning more about your church’s needs and ministries, you’ll learn about the programs and resources Thrivent offers to help address those needs. We’ll talk about one specific program, *Thrivent Choice*, today, and you’ll learn about many others in the weeks and months to come.

Communicating:

- ▶ As you gain an understanding of the needs of your church, you'll want to share them with your Thrivent Financial representative. He or she may be able to identify the resources that will best meet those needs.

Once you have a potential resource in mind, you'll share that idea with the appropriate person(s) in your church.

Provide a relevant example from your own experience of a church need that a congregational advocate might become aware of and a Thrivent resource that could address it. (Be sure to point out the front page of the *Understanding Your Role* document so participants can see other great examples of how congregational advocates might carry out their role.

Summarize:

- ▶ As you can see from the illustration on the handout, the key aspects of the congregational advocate role—connect, learn and communicate—are iterative and ongoing. Over time, you'll connect with more people, learn of new needs in the church and find additional ways that Thrivent can help.

The Congregational Advocate Team Concept:

Let participants know there can be up to eight “official” advocates in a church. (Ask if any of them were recruited by another congregational advocate.)

Discuss the benefits of having a team of advocates:

- Sharing the work (and the fun!)
- Leveraging the church's diversity: Engaging people from different demographics with varied interests and passions helps provide better representation of the membership in the church.
- Complementary skill sets: Surrounding yourself with people who have different skills and talents will make for a stronger and more effective team and can help make each person's experience more enjoyable since they are leveraging their unique gifts.
- Idea generation: Having several advocates can help foster creativity and new approaches.

Remind participants that as advocates in their churches, they can, no doubt, think of people they would like to work with! Caution them to think about others who are not necessarily like them but will complement them.

Transition to next section:

- ▶ As I mentioned earlier, we're going to talk about connecting with your church leaders to learn about the needs of your church, and to help them understand your role as a congregational advocate. But before we move on, let's take some time to answer your questions about your role overall.

Connecting With Church Leaders (20 minutes)

Topics Covered:	Materials Needed:
<ul style="list-style-type: none">• How to use this resource	<ul style="list-style-type: none">• <i>Connecting With Church Leaders</i> (#26345C)

Facilitator note:

The purpose of this section is simply to familiarize congregational advocates with the *Connecting With Church Leaders* document so they can begin preparing to have initial conversations with church leaders.

Share a copy of the *Connecting With Church Leaders* document.

- ▶ We just discussed the key aspects of the congregational advocate role—connect, learn and communicate. This conversation guide—*Connecting With Church Leaders*—is a resource that you can use as you begin to have conversations with leaders in your church.

Go through each section of the document, providing relevant examples and addressing questions.

Assure congregational advocates that conversations will be ongoing. They shouldn't expect to come out of one conversation with a full understanding of the church's needs or feel that they have to have all the answers when they meet with the church leader.

If your congregational advocate training is in-person, consider taking just a few minutes for participants to pair up and practice one part of the conversation. This can be a valuable way to prepare!

- One person could play the part of a church leader while the other explains the role of the congregational advocate and/or why they decided to serve in the role. (See the Introduction section on page 2.)
- Then, they could switch roles so each person has a chance to practice as well as to get into the shoes of the church leader and imagine the kinds of questions he or she might ask.

Wrapping Up (10 minutes)

Topics Covered:

- Getting started
- Plan for ongoing training and communication
- Q&A

Getting started:

- ▶ To wrap up, let's talk about a few things you can do to get started in your congregational advocate role.
 - Review Thrivent's mission and vision—*The Thrivent Way*.
 - Familiarize yourself with Thrivent programs and resources (on the “learn” tab of the Congregational Advocate page on Thrivent.com).

Schedule time to talk with your church leaders and identify opportunities where Thrivent resources can support the church's ministry efforts.

Plan for ongoing training and communication:

Congregational advocates will receive the monthly *Congregational Advocate News* from Thrivent. But what is *your* plan for communicating with them and for providing additional training? This is an opportunity for you to share with congregational advocates whether your chapter will provide ongoing opportunities to learn from one another.

Q&A:

Address remaining questions, and if there's something you need to research before you answer, let participants know you'll get back to them with your response.

Close:

Thank everyone for their participation and for their willingness to serve in the role of congregational advocate. Reinforce the positive impact they can have in their church and community!

Part 2: Thrivent Choice®

Objective: To help congregational advocates better understand the Thrivent Choice® program, how they can promote it in their church, and the tools and resources available to them.

Estimated session time: 60 minutes

Outline:

- Session Objectives5 minutes
 - Thrivent Choice Overview20 minutes
 - Congregational Advocate’s Role in Promoting Thrivent Choice25 minutes
 - Wrapping Up.....10 minutes
-
- 60 minutes

Preparation:

- Review the information available on the Program Details page of Thrivent.com.
- Become familiar with the Thrivent Choice resources available to congregational advocates (located on the Thrivent Choice Tools & Resources page.)
- Review the *Choice Dollars® Summary Report* which is available to each congregational advocate via their online Administration Menu. (See the Appendix of this document for a sample.)
- Print copies of the *Thrivent Choice Components* document for participants (located in the Appendix of this document).
- Order *How to Direct Thrivent Choice Dollars* handout card (#26087) for all participants via the Thrivent Order System.

Session Objectives (5 minutes)

Topics Covered:

- Session objectives

Session objectives:

- ▶ Our last session focused on your role as a congregational advocate, and gave you some ideas on how to get started. Now we will learn about the Thrivent Choice program.

How many of you are aware of the Thrivent Choice program? What has been your experience with it?

(Note: This question is simply for you to acknowledge that some congregational advocates may already be aware of the Thrivent Choice program while others may not be familiar with the program. Knowing this about your participants will help you gauge how much time you need to spend in certain areas of this training.)

Review session objectives:

Gain a solid understanding of the Thrivent Choice® program.

Become aware of Thrivent Choice resources and tools available to deepen your understanding as well as to educate others about the program.

Learn ways to promote Thrivent Choice within your church.

▶ Let's get started.

Thrivent Choice Overview (20 minutes)	
Topics Covered:	Materials Needed:
<ul style="list-style-type: none">• Thrivent Choice? What?• Thrivent Choice? Why?• Thrivent Choice? How?• Program summary	<ul style="list-style-type: none">• <i>Thrivent Choice Fact Sheet for Congregational Advocates</i>

Thrivent Choice: What it is:

▶ Thrivent Financial gives members the opportunity to recommend where Thrivent distributes some of its charitable outreach funds each year.

(Review the "What" section of the Thrivent Choice Fact Sheet for Congregational Advocates.)

Eligibility is based on a member's involvement with Thrivent.

The minimum amount of Thrivent Choice Dollars is \$25.

Thrivent Choice: Why:

▶ Let's talk about why this program was developed.

(Review the "Why" section of the fact sheet.)

Thrivent Choice is designed to get more members involved in deciding how Thrivent distributes its charitable grant funds and to support nonprofit organizations our members care about.

Ask why they think Thrivent Choice was designed this way.

Note: There are two key points here. The first is that as a membership organization of Christians, it is important for members to have a voice in how our resources are directed. The second is that members who own fraternal benefit society products generate the tax-exempt funds that allow Thrivent Financial to give back through programs like Thrivent Choice.

Thrivent Choice: How it works:

- ▶ So how can eligible members participate in the Thrivent Choice program?
(Review the “How” section of the fact sheet.)

Members participating in Thrivent Choice have two ways to direct Choice Dollars:

- Online at Thrivent.com.
- By phone at 800-847-4836 (say “Thrivent Choice” after the prompt).
(Check for understanding and address questions.)

Program summary:

Summarize the program using the “Summary” section of the fact sheet.

Ask participants to share how their church or organization has benefited from Thrivent Choice.

The Congregational Advocate’s Role in Promoting Thrivent Choice (25 minutes)	
Topics Covered:	Materials Needed:
<ul style="list-style-type: none">• Review role of congregational advocate• Promoting Thrivent Choice in your church• Thrivent Choice? How?• Program summary	<ul style="list-style-type: none">• <i>Thrivent Choice Fact Sheet for Congregational Advocates</i>• Examples of how to promote Thrivent Choice in churches• <i>Thrivent Choice</i> brochure (#32433)• <i>How to Direct Choice Dollars</i> handout card (#26087)

Role of the congregational advocate:

- Review the “What Is the Role of the Congregational Advocate?” section of the fact sheet.
- Encourage those congregational advocates who are eligible, to participate in Choice Dollars right away.

Promoting Thrivent Choice in your church:

- ▶ As we discussed, one aspect of the congregational advocate’s role is to facilitate discussions between church leaders and members as Thrivent Choice funds come in to determine how they may be best used in your church.

Keep in mind that Thrivent Financial members who are eligible to participate in Choice Dollars can choose to direct Choice Dollars to their church, or to another eligible organization that they care about—a school, social service agency or other nonprofit. They can also direct the funding to multiple organizations.

We want to be respectful of the decisions our members make in how they direct Choice Dollars. At the same time, *since you are advocating for your church*, it might generate interest if you can communicate how the Thrivent Choice grant funding in your church will be used, once that has been determined. Work with your church leaders to understand how Thrivent Choice Dollars are being used.

The grant funding comes from Thrivent Financial, and the organization decides how to use those funds.

Ask participants what ideas they have for promoting Thrivent Choice in their church. Be prepared to share some examples—your own, if you have them, or one of the following:

- If you have Bible study classes or the opportunity to provide an announcement in front of the church before, during or at the end of the worship service, share some key points about Thrivent Choice and how the program can benefit your church.
 - Share information at a Council or other church meeting.
 - Use Thrivent Choice bulletin inserts, or use the template and add your church's Choice Dollars results, available on Thrivent.com.
 - Provide an information session during or after a coffee hour.
- ▶ A report is available to you as a congregational advocate.
- To help you understand the Thrivent Choice funds are being directed to your church, go to the Church Volunteer Administration menu on Thrivent.com to view a Choice Dollars summary report for your church.
 - This is a quick way to view or track what your church has received.

Facilitator note: See the Appendix of this facilitator guide for a sample of this report.

Remind participants of the many promotional resources available to them on Thrivent.com. Some include:

- *Thrivent Choice* brochure (#32433).
- *How to Direct Choice Dollars* handout card (#26087).

Wrap-up (10 minutes)

Topics Covered:

- Reminder on tools and resources available
- Q&A
- Wrap-up

Tools and resources:

- ▶ I've given you many different resources to help you better understand and promote Thrivent Choice in your church.

Ask if everyone knows how to order these items on their **Member Leader Resources>Leadership Roles>Member Leadership Administration Systems>Congregational Volunteer Administration System>Order Church Supplies** area of Thrivent.com.

Explain that this is the same area where they can find links to all of the tools and resources for Thrivent Choice and other Thrivent programs.

Q&A:

- ▶ You have many options to get your questions answered regarding Thrivent Choice:
 - Chapter leaders.
 - The Thrivent Financial representative (if you have one) working with your church.
 - The Thrivent Choice area in Member Leader Resources on Thrivent.com. (**Thrivent.com>Member Involvement>Member Leader Resources>Programs & Activities>Programs>Thrivent Choice**)
 - The Member Connection Center—call 800-847-4836, and when prompted say, “Thrivent Choice.”

What questions do you have about Thrivent Choice before we wrap up today's session?

Wrap-up

- ▶ I hope you've found this session helpful. As you've learned, there are a lot of tools and resources available to you to educate others about this program, and to promote it in your church.

Thank you for participating today, and if you have additional questions or concerns that come up, please don't hesitate to contact me or any of the other areas I've previously mentioned to get the help you need.

And thank you for your volunteer leadership with Thrivent Financial.

Appendix

Choice Dollars Summary Report—available to congregational advocates via their online Administration Menu (located on the member leadership administration systems page in Member Leader Resources in the Leadership Roles tab).

**Church 12394 - Thrivent Choice
Choice Dollars Summary Report
Data As of February 29, 2012**

Congregation Name	Address	City	State	ZIP	Church #	# of Thrivent Members that belong to Congregation	# of Thrivent Members Eligible for Choice Dollars	% of Thrivent Members Eligible for Choice Dollars	# of Thrivent Members Directed Choice Dollars Current Year	Choice Dollars Grant Funds Distributed Current Year	# of Thrivent Members Directed Choice Dollars Previous Year	Choice Dollars Grant Funds Distributed Previous Year	# of Thrivent Members that have Recurring Direction Set up
Redeemer Lutheran Church	822 N 19th St	Allentown	PA	18104	12394	34	17	50.00%	6	\$417	4	\$418	1

Thrivent Choice® Components

- Thrivent Choice Voting®
 - All members vote for national charities (periodically)
- Thrivent Choice Dollars®
 - Eligible Benefit Members
 - Direct Choice Dollars®
 - To over 20,000 nonprofit organizations including churches (all year)



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