



**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. Our charitable grant program, Thrivent Choice®, is one way members can give back to organizations they care about. The program allows eligible benefit members to recommend where Thrivent distributes some of its charitable outreach funds each year.

Thrivent Choice is a joint program of Thrivent and its local branches. The leadership board represents all members within your local branch (i.e., chapter or Thrivent Member Network). Therefore, the leadership board must consider the views of all members within the local branch when reviewing and deciding on the nominated organizations. The following pages provide more detail about the leadership board's roles and responsibilities.

Eligibility requirements

The Thrivent corporate office ensures that the organizations sent to the leadership boards for review meet the eligibility requirements. In order for Thrivent to consider an organization eligible, it 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

An organization must meet certain criteria in order for Thrivent to consider it for enrollment as a Choice Dollars® grant funds recipient. A Thrivent benefit member must nominate the organization by completing an online recommendation form in order for Thrivent to consider it.

If Thrivent determines that the organization meets the eligibility criteria, Thrivent will invite it 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.
- Thrivent has admitted for membership.
- 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 adds the organization to the *Choice Dollars Pending Enrollments* report. Local board members can access and review the report, which includes the following information:

- The name, address and purpose of organizations that one or more local branch members have nominated. These organizations also must 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 decide.

Thrivent will send an email to the president and records director of a chapter when they need to review and decide on organizations added to the Choice Dollars Pending Enrollments report. The email will include instructions for how to access the report.



Thrivent Choice Dollars Organization enrollment process

Thrivent benefit member nominates organization.

Thrivent corporate office conducts initial eligibility check.

Thrivent invites eligible organization to apply.

If the organization applies, Thrivent corporate office completes processing steps.

Nominating member's local branch (i.e., chapter or Thrivent Member Network) leadership board reviews and votes whether to approve.

Member and member's financial representative notified by Thrivent corporate office of approval/denial decision by local branch.

If organization is approved, it will appear in the online catalog within one week.

If organization is denied, additional reviews may occur if it is nominated by a member from another local branch.

Your roles and responsibilities

Local branch leadership boards play a critical role in reviewing and deciding on the organizations that members of their local branch have nominated.

- For chapters only, Thrivent will send an email notification when it adds new organizations to the *Choice Dollars Pending Enrollments* report. The report requires the leadership board's review and decision.
- The leadership board should review and decide on 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 doesn't respond by the approval date, Thrivent will assume the leadership board approved the organizations listed on the report and will add them to the program's searchable online catalog.



Organizations that appear 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. One or more members of your local branch nominated the organizations for enrollment, so it's required that your leadership board review and decide on the nominations.

Review and decision-making process

Step 1—Access the *Choice Dollars Pending Enrollments* report

Thrivent member leaders

Thrivent will update the *Choice Dollars Pending Enrollments* every Friday. Member leaders can view and print it from the Reports/Listings area of the Chapter Leadership Administration Menu. To access this report:

- Go to Thrivent.com/leader-resources.
- Under **Administration Systems Login**, click on “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 year selected is current.
 - Click on the down arrow, select *Choice Dollars Pending Enrollments* and click “Go.”

Thrivent Member Network leaders

Thrivent Member Network board members can access the *Choice Dollars Pending Enrollments* report via the SAS portal. Thrivent has provided each board's secretary with instructions on accessing this report.

Chapter 30044 - Choice Dollars Pending Enrollments
As of Run Date: June 13, 2015

Note: Organizations appearing on this report may or may not be physically located within the boundaries of your Chapter/Thrivent Member Network (TMN). These organizations have been nominated as Choice Dollars grant funds recipient organizations by one or more members of your Chapter/TMN and are now requiring your review and decision. Thrivent home office has reviewed the organizations and determined they are eligible to be included in the program from both a federal tax exemption and outreach perspective. If you have questions about an organization on this report, please reach out to the nominating Thrivent member for further information.

Organization Name	Address	City	State	Organization Phone	Organization Web Address	Nominating Member Name	Nominating Member email	Nominating Member Phone	Needs Approval By
Chicago - Choice D	16 East Lombard, Suite 100	Chicago	IL	773.634.1111	http://www.chicagochoice.org	Christina	christina@chicagochoice.org	773.634.1111	Completed
Organization Purpose: <small>The mission of the Chicago Chapter (CCC) is to utilize the talent and the artistic abilities of the members to minister to our neighbors and to one another with the message of God's love and grace.</small>									

Step 2—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 close attention to the **"Needs Approval By"** dates. It's up to the leadership board to determine the decision-making process it will use. Since Thrivent already determined that the nominated organizations met eligibility requirements before including them on the report, **the leadership board can presume that the organizations listed meet eligibility requirements** (unless it has information indicating otherwise). Thrivent doesn't require your leadership board to investigate the nominated organizations. However, it may want to reach out to a member to learn more about the organization he or she nominated.

Keep in mind that member leaders represent all members within the local branch. Therefore, member leaders should take into account the views of all members when reviewing and deciding on an organization's application.



Step 3—Approve or deny enrollment

Approving organizations

If the leadership board approves the organization for enrollment:

- **No other action is necessary.** The leadership board will approve the organization for enrollment **35 days** after sending the review notification email. The Choice Dollars searchable online catalog will include the organization 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 (i.e., chapter 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 (i.e., chapter or Thrivent Member Network).
 - The name and address of the organization the leadership board did not approve.
 - The reason the leadership board denied the organization.
- Record all denials in the meeting minutes.

If the leadership board doesn’t respond by the **“Needs Approval By”** date, Thrivent will assume the leadership board approved the organization listed on the report and will add it to the program’s searchable online catalog. Thrivent will update the catalog within one week of approval.

- Thrivent may deny enrollment of an organization that a local branch leadership board previously approved 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 800-847-4836 and say **“Thrivent Choice”** at the prompt or send an email to mail@thrivent.com.



The Thrivent Choice® charitable grant program engages Thrivent members and chapters in providing grants that support charitable activities, furthering Thrivent's mission and its purposes under state law. All grants are made at the sole discretion of Thrivent. Directing Choice Dollars® is subject to the program's Terms and Conditions available at Thrivent.com/thriventchoice.



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