

Road Map to Success – Chapter Records Director

Year-at-a-glance checklist to help you learn and carry out 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 be successful in your role. You may **also want to review 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 abbreviation icons **R T CHIP** are listed below. Clicking on an icon or any underlined word in this document will either take you to its online location or directly to the document.

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"> <input type="checkbox"/> If you are a new leader, view the <i>New Volunteer Leader Orientation webinar</i> on Volunteer Leader Resources. R T <input type="checkbox"/> View the <i>Records Director role-specific training webinar</i> on Chapter Leaders Roles. R T <input type="checkbox"/> Review Understanding Your Role – Records Director R for details about your role. <input type="checkbox"/> Browse the following areas in the Volunteer Leader Resources area of thrivent.com: R <ul style="list-style-type: none"> For Chapter Leaders Forms & Conducting Activities Ask CHIP <input type="checkbox"/> Review the following topics in CHIP: CHIP <ul style="list-style-type: none"> Privacy Policy Thrivent Financial Logo Use and Naming Guidelines Co-hosting activities guidelines & reporting Agenda/minutes Reporting requirements <input type="checkbox"/> Work through <i>Administration Overview and Requesting Funds and Reporting Activity Results Online</i>, short, easy-to-complete tutorials. R 	<ul style="list-style-type: none"> <input type="checkbox"/> Register for a user ID and password to access the Chapter Leadership Administration Menu online. See How to Create a My Thrivent Account R for details. <input type="checkbox"/> Print Chapter Calendar. R <input type="checkbox"/> Read the monthly Chapter News e-mails and periodic e-mails from your Lutheran Engagement Team (LET) and Thrivent Financial. R <input type="checkbox"/> Update your chapter’s website administrator(s) and contact person. CHIP Search “<i>website for Chapters</i>” <input type="checkbox"/> Maintain accurate and up-to-date records, planning calendars and record and retain minutes at each chapter meeting. R CHIP Search “<i>Agenda/minutes</i>” <input type="checkbox"/> Report each chapter meeting online. CHIP Search “<i>reporting requirements</i>” <input type="checkbox"/> Become familiar with the steps for requesting, changing and reporting Care Abounds in Communities® activities. CHIP Search “<i>care abounds in communities</i>” <input type="checkbox"/> Attend local or regional training events provided by your LET team as available.

Key

- R** Resources for members and volunteers.
- T** Computer-based learning modules.
- CHIP** Online chapter reference tool. Click on “Ask CHIP.”

Questions? The Member Connection Center is available to answer your questions.

- Call 800-THRIVENT (800-847-4836) and say “Fraternal” between 7 a.m. and 9 p.m. Central time, Monday—Friday or email fraternal@thrivent.com.