

IMPORTANT:

- Thrivent Financial will send an email to the chapter president and records director to notify them a new organization has been added to the “Needs Chapter Approval” column (see page 3 of this guide).
- The chapter leadership board should approve or disapprove the eligibility of organizations for enrollment in Thrivent Choice Dollars no later than the “Needs Chapter Approval By” date listed on the report.
- If the chapter board does not provide a response by the date listed, all organizations listed on the report (in the “Needs Chapter Approval” column) are approved for eligibility in Choice Dollars.

Overview

Chapter leaders play a critical role in approving organizations, within their chapter's geographic region, that have applied to receive funds through the Choice DollarsSM component of Thrivent ChoiceSM. The approval process is intended to be a joint process of Thrivent Financial and chapters, with chapters normally making a final approval or disapproval decision after Thrivent Financial has given its approval.

Why do chapters need to approve organizations applying to be Choice Dollars recipients?

Chapter leaders are familiar with the Lutheran organizations and congregations in their local communities and are in a good position to perform a final review and approval.

Thrivent Financial for Lutherans has established specific eligibility requirements that organizations must meet if they want to be considered for enrollment in Choice Dollars (see sidebar). Organizations wishing to enroll in Choice Dollars must submit a Thrivent Choice Charitable Organization Application form to Thrivent Financial for Lutherans for consideration.

Meeting the eligibility criteria does not guarantee that an organization will be approved for participation. **Thrivent Financial has discretion to determine whether or not organizations are eligible to receive Thrivent Choice charitable grant funds.**

Approving Organizations: Instructions for Chapter Leaders

Thrivent Financial will initially review all applications for enrollment in Choice Dollars, and determine whether or not each applicant meets the program eligibility requirements. A *Choice Dollars - Chapter Organization and Congregation List* (see page 3 of this guide for a sample) is provided to chapter leaders. This list includes organizations that:

- Have applied for enrollment in the Choice Dollars program
- Are based within the chapter's geographic boundaries, and
- Thrivent Financial has initially reviewed and found to be eligible for enrollment as a Choice Dollars recipient.

Eligibility requirements . . .

- Be an incorporated, nonprofit organization that is exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code and have a unique Employee Identification Number (EIN).
- Be recognized by or affiliated with a Lutheran church body or clearly and publicly identified as a Lutheran organization.
- Be domiciled in and provide services in the U.S.
- Have at least one year-round staff member employed.
- Be an independent fiscal organization with its own unique bank account to receive electronic funds transfers (EFT).
- Meet criteria outlined in [Thrivent Financial's Policy on Grants and Gifts](#) (PDF, 12K).
- Agree and comply with the [Terms and Conditions](#) (PDF, 123K) of the Thrivent ChoiceSM Program for organizations and any changes to these Terms and Conditions.

Step One—Access the Choice Dollars – Chapter Organization and Congregation List

The list is updated every Friday. Chapter leaders can view and print the *Choice Dollars - Chapter Organization and Congregation List* from the **Reports/Listings** area of the Chapter Leadership Administration Menu. To access this list:

1. Go to Thrivent.com and click on **Thrivent Community**
2. Then click **Chapters > Volunteer Leader Resources > For Chapter Leaders > Chapter Leadership Administration Menu** and log in. *Note: If this is your first time logging in to the Administration Menu, you will need to complete a short one-time registration.*
3. On the Chapter Leadership Administration page, under Reports/Listings:
 - Make sure the current year is selected
 - Click on the down arrow, select *Choice Dollars - Chapter Organization and Congregation List* and click **Go**

Step Two—Conduct the Review

- Conduct a face-to-face chapter meeting to discuss and review the organizations on the *Choice Dollars - Chapter Organization and Congregation List*. If this isn't possible, chapter leaders may hold this meeting via teleconference (see *Tips for Conducting Teleconference Calls* on CHIP for details). As a last resort, consideration may be done through an email exchange among all chapter leaders.
- Using the *Choice Dollars – Chapter Organization and Congregation List*, review the organizations/ congregations that have an **X** in the “Needs Chapter Approval” column.
- It is up to the leadership board to determine the process it will use to make its decisions. Chapter leaders are not required to investigate the applicant organizations or conduct research. Since Thrivent Financial already determined that these applicant organizations met eligibility requirements before they were included on the listing, **the chapter leadership board can presume that the listed organizations with an “X” in the “Needs Chapter Approval” column meet the eligibility requirements** (unless the leadership board has information that an organization does not meet these requirements). *Note: See page 3 of this guide for a sample of this listing.*
- Chapter leaders may have additional knowledge regarding an organization not known by Thrivent Financial. A chapter could disapprove an organization that meets the stated eligibility requirements if the leadership board determines that there are unusual circumstances that are serious enough that the organization should not receive any Choice Dollars funds. Disapproval due to unusual circumstances is expected to be rare.

Examples:

- *An organization could be disapproved for enrollment because the organization is in the process of ceasing operations, or has been found by local authorities to be misusing donated funds.*
- *A chapter leader knows that an organization on the list is no longer affiliated with a Lutheran church body and has ceased to identify itself as a Lutheran organization or that it does not have a year-round staff person.*

Step Three—Approve or Disapprove Enrollment for an Organization

Approving Organizations

- If the chapter leaders determine the organization meets the established criteria and approve the organization for enrollment, **no other action is necessary**. The organization is approved for enrollment in Choice Dollars.
- If the chapter leaders determine the organization does **not** meet the criteria or should not be approved due to serious unusual circumstances, move to the ‘Disapproving Organizations’ section below for next steps.
- Record all approvals in the chapter meeting minutes.

Note: *If a chapter leadership board initially approves an organization to receive Choice Dollars funding but later discovers that the organization 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 funding, the chapter should report this by sending an email to mail@thrivent.com.*

Disapproving Organizations

If the chapter leaders determine the organization should not be approved:

- The records director or president should send an email to mail@thrivent.com no later than the “Needs Chapter Approval by” date listed on the report, indicating the chapter leadership board did not approve the organization for enrollment. The email should include the following information:
 - a. “Thrivent Choice Disapproval” as the subject line
 - b. The name and number of your chapter
 - c. The name and address of the organization the chapter leadership board did not approve.
 - d. A brief explanation as to why the chapter leadership board did not approve the organization for enrollment to receive Choice Dollars funding.
- Record all disapprovals in the chapter meeting minutes.

Chapter 31059 - Thrivent Choice Organization and Congregation List As of Run Date: February 25, 2011

Organization Congregation	Address	City	State	Organization Phone	Needs Chapter Approval	Needs Chapter Approval by	Approved by Corporate and Chapter	Application Received Pending Review by Corporate	May be Eligible No Application Received	Organization Congregation Opted Out	Not Approved by Corporate	Not Approved by Chapter	Choice Dollars Received Current Year	Choice Dollars Received Previous Year
Christ Lutheran Church	86 S Main St	Manchester	PA	(717) 266-1316	X	04MAR2011								
Christ Lutheran Church	4800 N Sherman Street Ext	Mount Wolf	PA	(717) 266-6064	X	11MAR2011								
St Mark Lutheran Church	3293 Broad St	Emigsville	PA	(717) 764-8038	X	04MAR2011								
Advent Lutheran Church	1775 E Market St	York	PA	(717) 755-5007										
Calvary Lutheran Preschool	9 N Main St	Dover	PA	(717) 292-3891										
Canadochly Lutheran Church	4921 E Prospect Rd	York	PA	(717) 244-3112										
Joyful Noise Preschool	2215 Brandywine Ln	York	PA	(717) 767-4673										
Rohlers Lutheran Church	701 Rohlers Church Rd	Dover	PA	(717) 767-7704					X					
Shiloh Lutheran Church Preschool	2201 Church Rd	York	PA	(717) 764-8200					X					
St John Lutheran School	2580 Mount Rose Ave	York	PA	(717) 755-4779					X					
St Mark Lutheran Church	700 E Market St	York	PA	(717) 845-8023					X					
St Matthew Lutheran Church Pre-Kindergarten School	839 W Market St	York	PA	(717) 845-2721					X					
St Peter Lutheran Preschool	947 N George St	York	PA	(717) 854-0569					X					
Union Lutheran Church	408 W Market St	York	PA	(717) 843-7897					X					
Calvary Lutheran Church	9 N Main St	Dover	PA	(717) 292-3891			X							
Christ Church Child Care Center	29 S George St	York	PA	(717) 854-2239			X							
Christ Evangelical Lutheran Church of Spry	2385 S Queen St	York	PA	(717) 741-4839			X							

Chapter leaders should review the organizations/congregations that have and x in the "Needs Chapter Approval" column by the date indicated in the "Needs Chapter Approval By" column.

Job: M0UW4400 frequency: Weekly

This is proprietary information that is solely for use by employees, volunteers, and agents of Thrivent Financial for Lutherans in connection with fraternal activities of Thrivent Financial for Lutherans

Reminders

- If the chapter leadership board does not provide a response by the “Needs Chapter Approval By” date, the organizations in the “Needs Chapter Approval” column are approved for enrollment in Choice Dollars. The listed organizations will be deemed to have been approved by the chapter.
- In rare instances, Thrivent Financial may deny enrollment of an organization that was approved by the chapter leadership board if Thrivent Financial later determines that the organization does not meet the eligibility criteria. Thrivent Financial may terminate the eligibility of an organization to receive funds through Choice Dollars at any time and for any reason, with or without notice to the organization.
- Thrivent Financial also may allow an organization that meets the eligibility criteria to enroll in Choice Dollars even though the chapter may have disapproved the organization. This is expected to be very rare.

Questions? Call the Member Connection Center at 800-THRIVENT (800-847-4836) and say “Thrivent Choice” between 7 a.m. and 9 p.m. Central time, Monday—Friday. Or email mail@thrivent.com any time of the day. You will receive a response by the next business day.