

## **Congregational Advocate Training: Getting Started Facilitator's Guide**

### **A note to the facilitator:**

The way in which congregational advocates are trained 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 his or her congregational advocates.* For example, this initial training 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.

### **Introduction to Getting Started:**

This Guide is intended to be used to facilitate the *initial* training for new congregational advocates. The primary objective of this session is 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:**

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|--|------------|
| ▪ 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 |
| ▪ Wrap up .....                                | 10 minutes |
|  | 90 minutes |

### **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 90 minutes for your session, determine what you will cover at a later time – e.g., the *Connecting with Church Leaders* topic.
- If you have the luxury of *more* than 90 minutes, decide which topics could warrant additional time and allow for more discussion during the session.
- Remind congregational advocates to bring their *Congregational Advocate Resource Guide* to the training session – whether in person or on the phone – as you will be referring to some of the contents 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!

## Setting the Stage

15 minutes

Topics covered	Materials needed
<ul style="list-style-type: none"> <li>▪ Welcome</li> <li>▪ Introductions</li> <li>▪ Session objectives</li> </ul>	<ul style="list-style-type: none"> <li>▪ Congregational Advocate Resource Guide #25923KIT (mailed to all new CAs from the home office)</li> <li>▪ Video: <a href="#">Our Story and Yours</a> #26015DVD (if training is in person)</li> </ul>

### **Welcome:**

- Welcome new congregational advocates and thank them for their willingness to take on this important leadership role.
- If you are conducting the training in person, consider showing *Our Story and Yours* to kick off the session. Only six minutes long, it's a great way to set the stage and help new congregational advocates gain a better understanding of Thrivent Financial and the positive impact we make in the lives of our members and their communities.

### **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 congregation
  - 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 two webinars that were mentioned in the letter they received in their Resource Guide. They are found on the "For Congregational Advocates" page on Thrivent.com:
  - New Volunteer Leader Orientation
  - Congregational Advocate Role-specific Training
- "The objectives of *this* session are:"
  - To help you gain a better understanding of your role and how your congregation can benefit from the resources Thrivent has to offer; and
  - 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 congregation."
- 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"> <li>▪ Organization background</li> <li>▪ What makes us unique</li> <li>▪ Benefits of membership</li> <li>▪ The Thrivent Way</li> </ul>	<ul style="list-style-type: none"> <li>▪ What Makes Us Different Makes Us Strong</li> <li>▪ Experience the Membership Difference</li> <li>▪ Mission/Vision bookmark</li> </ul>

### **Objectives:**

- Share a brief overview of Thrivent Financial’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 is it? How 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 20<sup>th</sup> 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 Community*.”
  - “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 – are used for programs which support giving back to the community, and helping 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 faith-based membership organization, has to offer. So you’ll want to become familiar with the benefits of membership.”
- [Ask participants to pull out the *Experience the Membership Difference* information sheet. Refer to the information it contains, and explain that they can learn more by visiting [Thriven.com](http://Thriven.com) > Thrivent Community > Membership. 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 Financial’s mission, vision, and values 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, Vision and Values bookmark to learn more.”
- [Refer participants to the Mission, Vision and Values 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 help 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"> <li>▪ Purpose</li> <li>▪ Connecting</li> <li>▪ Learning</li> <li>▪ Communicating</li> <li>▪ The “Team” Concept</li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Understanding Your Role</i> document</li> </ul>

### **Purpose of the congregational advocate role:**

- Provide a brief overview of the purpose of the congregational advocate role. (Draw upon what participants said in their introductions – e.g., wanting to make a difference in their congregation; being passionate about carrying out their congregation’s ministries; wanting to help fellow members become more financially secure; etc.)
- Ask participants to pull out the *Understanding Your Role* document (in section 1 of their Resource Guide).
- 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 be connecting with a variety of people – Thrivent Financial members, congregational 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 congregation’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 congregation’s needs and ministries, you’ll also learn about the various programs and resources Thrivent offers that can 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 congregation, you’ll want to share them with your director of congregational advocates and your Thrivent Financial representative so they can help identify the resources that will best meet those needs.”
- “Once you have a potential resource in mind, then you’ll share that idea with the appropriate person(s) in your congregation.”

- Provide a relevant example from your own experience of a congregational need that a CA might become aware of and a Thrivent resource that could address it. (Be sure to point out the *Putting Your Faith Into Action* side of the 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 congregation, 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 congregation. (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 congregation’s diversity: engaging people from different demographics with varied interests and passions helps provide better representation of the membership in the congregation.
  - Complementary skillsets: surrounding themselves with people who have skills and talents different than their own will make for a stronger and more effective team and can 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 congregations, 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 rather who 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 congregation, 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 congregational advocate role overall.”

## Connecting with Church Leaders

20 minutes

Topics Covered	Materials Needed
<ul style="list-style-type: none"> <li>▪ How to use this resource</li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Connecting With Church Leaders: A Conversation Guide for Congregational Advocates</i></li> </ul>

### **Facilitator note:**

This 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.

- Refer participants to the *Connecting With Church Leaders* document in their Resource Guide.
- “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 congregation.”
- Go through each section of the document, providing relevant examples and addressing questions.
- Assure congregational advocates that conversations will be ongoing, over time. They shouldn’t expect to come out of one conversation with a full understanding of the congregation’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.

## Wrap-up

10 minutes

Topics Covered	Materials Needed
<ul style="list-style-type: none"> <li>▪ Getting started</li> <li>▪ Plan for ongoing training and communication</li> <li>▪ Q&amp;A</li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Getting Started as a New Congregational Advocate</i></li> </ul>

### **Getting started:**

- Refer participants to the *Getting Started as a new Congregational Advocate* document in their Resource Guide.
- “In wrapping up, let’s talk about a few things you can do to get started in your congregational advocate role.”
- Go through each section of the document, providing relevant examples and addressing questions.

### **Plan for ongoing training and communication:**

Congregational advocates will receive the monthly “Congregational Advocate News” from Thrivent’s home office. But what is *your* plan for communicating with them and for providing additional training? This is an opportunity for you to assure congregational advocates that there will be ongoing training, support and opportunities for them to learn from one another.

### **Q&A:**

Address remaining questions, and if there’s something you need to research before being able to 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 congregation and community!