

# Chapter Leadership Board Activity Review Process

For decisions on Care Abounds in Communities® activities

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Name of activity \_\_\_\_\_

Proposed activity date \_\_\_\_\_

## Activity type

- Educational** – instruction/training to improve capabilities or knowledge about useful topics that benefit, are of interest to and will attract Thrivent Financial members and others.
  - Member social** – brings Thrivent Financial members and their personal guests together to strengthen relationships among members.
  - Fundraiser** – generates funds for an individual, family or qualified not-for-profit organization.
  - Hands-on service** – involves volunteer labor to assemble, develop or improve something for an identified recipient. Funds are provided to purchase necessary materials used in an activity to help an individual, family or qualified not-for-profit organization.
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*As chapter leaders, you have been elected by the Thrivent Financial members of your chapter to represent them. An important responsibility you have is to make decisions on requests for funding from the Care Abounds in Communities® program. The following steps can help your chapter with the decision-making process.*

## 1. Review and discuss the activity/funding request. Is the activity eligible to receive Care Abounds in Communities program funding?

*Determine if the request:*

- Is complete. If necessary, follow up with the service team contact and ask for the information needed.
- Was initiated by an eligible Thrivent Financial service team.
- Meets program and activity requirements\* and any chapter guidelines you have established (does it support Thrivent Financial's [mission](#), and your chapter's vision?).
- If there are concerns, discuss ways that the request may be revised and share your input with the service team contact to help the team address these concerns.
- Maintains Thrivent Financial's position of neutrality on issues\*\* where significant disagreement or debate exists among Lutherans.

\* For specific program guidelines and eligibility rules, see CHIP at [www.thrivent.com/chip](http://www.thrivent.com/chip) and search on "program requirements."

\*\* See CHIP, search on "neutrality" and choose Policy on Grants and Gifts.

## Chapter Leadership Board Activity Review Process *(continued)*

### 2. Evaluate the funding/activity request. Is this a good activity to approve funding for?

*When evaluating requests, consider the following qualities of a successful activity:*

- Does this activity align with our chapter's goals – where we want to focus?
- Will chapter members and non-members want to support, attend and contribute to the activity?
- Does this activity have the potential to serve *more* people and help *more* families become financially secure in the coming year?
- Will the activity promote the value of Thrivent Financial membership and offer a meaningful member experience?
- Will the activity be promoted as a Thrivent Financial for Lutherans chapter activity?
- Does the activity have the potential for many volunteer hours and/or funds raised?

### 3. Make a decision to fund or not to fund.

- If the request is for an educational or member social activity, should the activity be funded from operating funds? Chapters are encouraged to first consider using operating funds for these types of activities – the predominant focus for use of Care Abounds in Communities funds should be for charitable activities.
- If you fund the activity, decide what amount will be funded and how funds will be paid.

Note: A simple majority rules when voting. Document the decision in your chapter meeting minutes posted online.

### 4. Communicate your decision to the service team.

*If an activity is:*

- Approved**—Provide clear communication about the decision and what is expected from the service team. For example, share:
  - o The funding amount that was approved and how funds will be paid.
  - o Specific instructions (e.g., what constitutes volunteer hours; net funds raised need to be deposited into the chapter checking account; **checks should be made payable to the chapter**).
  - o Applicable forms the service team needs to complete.
  - o Promotional materials available (e.g., banners, news releases, bulletin inserts, ads).
- Denied**—It's difficult to tell good people their activity was denied. Whether you talk to a service team member in person, via email or by a letter, respectfully provide the rationale as to why the activity was denied. Be sure to let the individual know the important elements the board looks for when reviewing funding requests.

**Chapter board decision:**    Accept    Deny    Return for missing information

**Date of action:** \_\_\_\_\_   **Activity ID:** \_\_\_\_\_

**Dollar amount to be supplemented:** \_\_\_\_\_

**Date service team contact informed:** \_\_\_\_\_

**Chapter leader contact:** \_\_\_\_\_