

## **Community Service Team Director**

Role-Specific Training

## **Welcome**

- Thank you for becoming a member of your chapter's leadership board.
- Recording, Thrivent.com, and other board members, past and present, are good resources.
- Ask, research and be open to learning new ways.

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## **Getting started**

- Learn about the Care Abounds in Communities® program.
  - CHIP on Thrivent.com
- Build relationships with other chapter leaders who will help you with the process.
  - Communications director helps publicize activity.
  - Records director enters information about completed fundraiser online.
  - Financial director writes check to the recipient.

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## **Getting started**

- Get to know chapter members.
  - They form service teams.
  - They may be in need.

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## Role specifics

- Members contact you with need in mind.
- Determine fundraiser, hands-on service activity, educational event or social activity.
  - Fundraisers generate funds for recipient.
    - Can be a not-for-profit, individual, or family.

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## Role specifics

- Determine the fundraiser, hands-on service activity, educational event or social activity.
  - Hands-on service activities
    - Chapter funding + volunteer labor = something assembled, developed or improved for recipient.
- Service team should be organized by a Thrivent Financial member.

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## Role specifics

- Make service team aware that Thrivent Financial takes privacy of information guidelines seriously.
  - We expect they won't share member information inappropriately with others.
  - Same guidelines for recipients.
    - Make sure recipient is comfortable with his or her situation being made public.
    - They need to sign Permission to Disclose Information form, found in Visibility Toolkit on Thrivent.com.

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## Role specifics

- Ask service teams to complete and submit formal funding request.
  - Form is on Thrivent.com > Thrivent Community > Forms > Before the Activity > Care Abounds in Communities Request for Funding.

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## Role specifics

- After chapter vote on funding, notify service team of result.
  - If approved, inform service team of:
    - Funding amount.
    - How funds paid.
    - Additional forms to be completed.

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## Role specifics

- Advise service teams to track information that records director reports online.
  - Total expenses incurred.
  - Total volunteer hours.
  - Total members attending.
  - Total attendance.

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## Role specifics

- Introduce service team to communications director to start publicizing the event.
  - If no communications director, make service team aware they're expected to identify that Thrivent Financial is providing additional funding.
  - Use posters, bulletin inserts and news releases in the Visibility Toolkit.
  - Ask for copies of all publicity items.

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## Role specifics

- Keep chapter board apprised of progress during chapter leadership board meetings.
- After the event, get information from service team and give it to records director.
- Financial director distributes funds.

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## Your unique contribution

- You keep things moving through the process.
- It wouldn't work as smoothly or be such a coordinated team effort without you.

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## Tools and resources

- CHIP, on Thrivent.com.
- Reports on Chapter Leadership Administration menu.
  - Care Abounds in Communities Details.
  - Chapter Activity Status Report.
- Other chapter leaders.

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## Tools and resources

- Advisory positions to help you.
- Member Connection Center
  - Call **800-847-4836** (800-THRIVENT) and say 'fraternal' Monday through Friday from 7 a.m. to 9 p.m., Central time.
  - Email [fraternal@thrivent.com](mailto:fraternal@thrivent.com).

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## What to focus on first

- Learn the Care Abounds in Communities® funding process.
- Get to know the chapter leadership board members.
- Recruit advisory team members to help.

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## Closing

- Topics for board discussion:
  - Background on Thrivent Financial and the chapter system.
    - Listen to the audio recording.
    - Read more at Thrivent.com.
  - Gaining access to and using the chapter online system.
    - Web is key. Find a way to access it.
    - Need help getting set up? Contact the Member Connection Center at 800-847-4836 (800-THRIVENT) and say ‘fraternal.’

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## Closing

- Care Abounds in Communities®
  - Learn about process:
    - Online.
    - In CHIP.
    - From a veteran at one of your board meetings.

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## Closing

- Follow Thrivent Financial’s privacy policy and practices.
  - Care program funding recipients must complete “Permission to Disclose Information” form.
    - Adult recipient version.
    - Parent/Guardian version.
    - Found in CHIP.
  - Provides Thrivent Financial with permission to use, disclose and publish recipient’s name and other pertinent information about recipient to plan, conduct, advertise and communicate results of fundraising activity for recipient’s benefit.
  - If qualified nonprofit organization is recipient, form doesn’t need to be signed unless person’s name or likeness published.
    - Could be employee or volunteer of nonprofit organization.

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## Closing

- Learning about RFO programs and focus.
  - Visit RFO website to find information about events, etc.
  - They can post information for you.
- Bringing it all together as part of the chapter system of Thrivent Financial.
  - Help your chapter run smoothly:
    - Tap into knowledge of past leaders and Community Engagement Team.
    - Read emails and mailings from the corporate office.

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## Closing

- Ambassador for Thrivent Financial
  - Tell about your experiences and why you chose to volunteer.
  - Prework:
    - Pull together your thoughts in an “elevator speech.”

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## Closing

- Get more members involved.
  - Friends, church members, new acquaintances.
  - Help service teams get more members involved.
  - Plan activities with financial representatives.
    - Provide venues for financial representatives to meet people.
    - People learn about Thrivent Financial.

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## Closing

- You make an impact.
  - Today is focused on paperwork and processes, but there's more.
  - Chapter is like a foundation.
  - Reflect on what you've done and whom you've helped.
  - Share your thoughts and feelings with members and nonmembers.
  - Your attitude will be contagious.

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