

Records 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.

2

Getting started

- Internet and email access.
- Talk with outgoing records director.

3

Role specifics

- Record meeting minutes.
 - Focus on:
 - Decisions reached.
 - Action items to follow up on.
 - Open issues.
 - Have board review and approve.
 - Enter online.
 - Use minutes to keep FR informed.
 - See CHIP for details.
 - Thrivent.com > Thrivent Community > CHIP.

4

Role specifics

- Report a meeting.
 - Add, update, and view new and existing minutes in Chapter Leadership Administration section.

5

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Role specifics

- Review previous meeting minutes at current meeting.
 - Brings everyone up to speed.
 - Allows discussion to continue on tabled agenda items.

6

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Role specifics

- Report chapter meetings online
 - Important: Recording online **doesn't** record that meeting took place.
 - More information in CHIP.

7

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Role specifics

- Print reports of new members.
 - Chapter board reviews and admits.
 - Legal requirement as fraternal benefit society.
 - Chapter board doesn't determine eligibility.
 - For more information, search in CHIP in "admitting members."

8

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Role specifics

- Receive and process correspondence to and from community service teams.
 - May share with community service team director, if chapter has one.
 - Receive requests for funding and bring to chapter board for vote.
 - Notify service team of board’s decision.
 - Monitor outcome of service project.

9

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Role specifics

- Report community service team activity results.
 - Community service team provides information that you enter online.
 - Actual activity date.
 - Net funds raised (fundraiser only).
 - Total expense incurred.
 - Total volunteer hours.
 - Total members attending.
 - Total attendance.
 - Total member households activity involved.
 - Entering information triggers release of Care Abounds in Communities® funds.

10

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Role specifics

- Submit necessary nonfinancial report to Operations Center.
 - Board member volunteer hours.

11

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Role specifics

- Order chapter supplies online.
 - Order Chapter Supplies page on the Administration Menu page.
 - Shopping cart feel where you can preview, select and order items.
 - Includes Care Abounds in Communities supplies:
 - Posters.
 - Bulletin inserts.

12

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Role specifics

- Order chapter supplies online.
 - Can also order:
 - Forms.
 - Name tags.
 - Thank-you cards.
 - Brochures.
 - Meeting minute forms.
 - Personal imprint items.
 - Event visibility and publicity items.
 - Review How to Order Supplies instruction guide, found in CHIP.
 - Visit The Store for ordering logo merchandise.

13

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Role specifics

- If no communications director in your chapter, you'll handle chapter newsletter and postcards.
 - Recruit chapter members to help you.
 - CHIP contains information about all communications vehicles to help plan for future options.

14

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Role specifics

- Enter/update elected and appointed leaders.
 - Once a year at election time.
 - Unless board members steps down and is replaced.
 - Alerts corporate offices to board structure changes.
 - Helps ensure board receives corporate office correspondence.

15

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Your unique contribution

- Help ensure there are accurate records of chapter activities.
- Be the chapter historian!

16

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Tools and resources

- CHIP.
- Resources for All Chapter Leaders page.
- For Chapter Leaders page.
- Chapter Leadership Administration page.

17

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Tools and resources

- Chapter News.
 - Monthly newsletter from the corporate offices.
 - Print for board members without online access.
- Other chapter leaders.
- Community Engagement Team.

18

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Tools and resources

- 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.

19

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What to focus on first

- Make sure you have Internet and email access.
- Find what works best for you to take meeting minutes.
- Explore the Chapter Leadership Administration page and CHIP.

20

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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).

21

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Closing

- Care Abounds in Communities®
 - Board's primary role is to distribute these funds.
 - Learn about process:
 - Online.
 - In CHIP.
 - From a veteran at one of your board meetings.

22

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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.

23

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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.
- Visit your own chapter website.
- 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.

24

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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.”

25

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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.

26

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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 enthusiasm will be contagious.

27

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Closing

- Chapter Leader Roles – role-specific training and resources.
- How to Register on Thrivent Financial's website.
- How to Access Chapter Leadership Administration.
- Administration Overview – Learn how to access and navigate in Chapter Leadership Administration area (interaction and simulation).
- Requesting Funds and Reporting Activity Results – Learn about Care Abounds in Communities program and how to request funding and report results for activities (interaction and simulation).

28

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