

60 Minutes to Understanding Your Role as Chapter Records Director

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Training Module Objectives

The records director provides leadership to the administrative functions of the leadership board. You are part of a board that provides strategic direction, leadership planning and administration support to service teams.

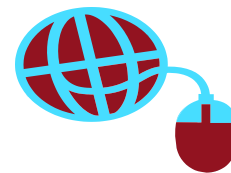
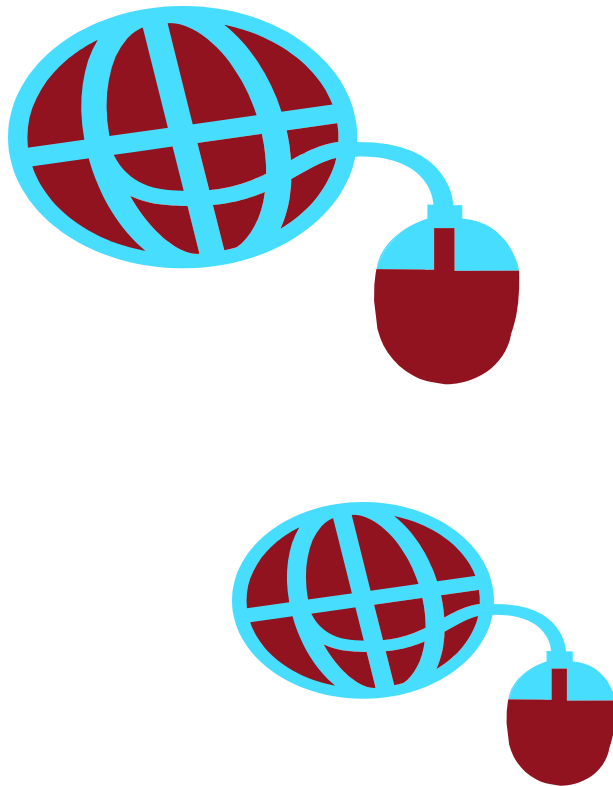
- Section A: The Records Director's Responsibilities
- Section B: Get the Word Out!
- Section C: Resources to Help You

Section A: The Records Director's Responsibilities

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But First, the Internet

Many of the your duties discussed in this module require Internet access. The resources to carry out these duties are available at www.thrivent.com in Chapter Leadership Administration. Just keep this in mind as we talk about your duties.



Duty 1: Maintain Chapter Records

Your first duty is to maintain accurate, and up-to-date chapter records. This includes Recording/Reporting Chapter Minutes, and Reporting Chapter Meetings. They sound similar, but are really two separate tasks. Perform them online in Chapter Leadership Admin.

Tip: Get your chapter organized! Together with the chapter president and other officers, create a master calendar. Include upcoming meetings, service events, important deadlines, and contact numbers.

1. Record & Report Minutes

Record the basics. Meeting dates, new members voted in, attendance (guests and members), length of meeting, officer reports, meeting expenses (if any), funds raised (if any), volunteer hours, contact information.

Record the action. Decisions reached. Follow-up action items. Open issues.

Maintain confidentiality. Do not include personal details.

Report minutes online. Minutes must be kept for 7 years. Enter your minutes online at www.Thrivent.com in Chapter Leadership Administration. Click on Manage Chapter Meeting Minutes. Follow the on-screen instructions. Thrivent will store the minutes for you.

2. Report Meetings

Report Meetings Online

Chapters are legally required to meet at least quarterly. When a business meeting occurs, record it online under Report Locally Supported Activity Results.

Duty 2: Report Locally Supported Chapter Activities

Members are encouraged to continue volunteering and helping others, even when funding through the chapter Care program is no longer available.

Chapters can sponsor locally supported fund-raising, administrative, social and hands-on service activities that **do not** use funds from any of the chapter Care programs (e.g. chapter meetings, confirmation recognition and other social activities).

However, please report this good work in Chapter Leadership Administration under Report Locally Supported Activity Results.

Tip: For more information on locally supported chapter activities, go the www.Thrivent.com, members/chapters only, chapter leaders only, CHIP (Chapter Information Place). Search 'locally supported'.

Duty 3: Chapter Correspondence

The Records Director receives and processes correspondence. Thrivent Financial provides **free** mailings, which can be sent to your entire membership or by segment (zip code). Best of all, you can create it all online. It's simple!

Good ideas:

- Describe chapter social activities
- Introduce newly-elected (or appointed) chapter leadership board members
- Send open invitations about chapter meetings, social events, educational seminars, and annual meetings
- Inform readers about service team activities
- Use mailings as a forum for volunteer recognition

Tip: Complete instructions are available online under quick reference guides.

Section Review: The Records Director's Responsibilities

The records director provides leadership to the administrative functions of the leadership board. You are part of a board that provides strategic direction, leadership planning and administration support to service teams.

Maintain Chapter Records

- Record and report minutes. Include basic information, action taken, maintain confidentiality.
- Report meetings. Thrivent chapters are legally required to meet at least quarterly.

Report Locally Supported Chapter Activities

- Make reports. Chapters can sponsor locally supported fund-raising, administrative, social and hands-on service activities that **do not** use funds from any of the chapter Care programs (e.g. chapter meetings, confirmation recognition and other social activities).

Chapter Correspondence

- Receive and process correspondence.
- Advertise you chapter activities and recognize volunteers, using your free chapter mailings. Remember to submit online four weeks in advance.

Section B: Get the Word Out!

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Be Proactive, Be Visible

Ready, Set, Go!

As Records Director, you manage resources that get the word out.

Chapter mailings and correspondence set the tone.

An effective visibility campaign generates excitement about volunteerism.

Tip: Create a chapter visibility campaign with the help of your fellow board members. Discuss what events you want to publicize. Brainstorm creative ways to recognize volunteers in mailings and newsletters.

Need Help? The Visibility Toolkit on www.thrivent.com has everything you need to generate publicity.

Event Ideas

- Thrivent Awareness Sunday
- National Volunteer Week
- Join Hands Day
- Make a Difference Day
- Educational Seminars
- Social Events
- Thrivent Builds
- Chapter-sponsored events, including training, fundraisers and service projects
- Special events, such as Christmas parties or summer picnics
- Meeting notices
- Election of leaders
- Formation of service teams

Recognition Ideas

- “Hats Off to Volunteers” section in mailings
- E-cards and thank you notes
- Letters to the editor
- Thank you in bulletin or church newsletter

Make the Most of Mailings

Ideas for Your Free Mailings

Introductory Mailing	—	Use a mailing to inform chapter members about the new chapter leadership board (officers, contact numbers), funding guidelines and procedures, and upcoming activities.
Mid-Year Update Mailing	—	Get the word out. Inform members of upcoming service projects, publicize successful events, recognize volunteers, include tips on useful online resources available for congregational service teams and volunteers, such as bulletin inserts.
Election Update Mailing	—	Publicize upcoming chapter leadership board elections. Generate excitement and enthusiasm by recounting your successes. Recruit new leaders. Provide procedural information and contact numbers.
Year End Wrap Up Mailing	—	Summarize activities. Thank volunteers. Set the stage for next year.

Make the Most of Minutes

You spend a lot of time writing and recording chapter meeting minutes – why not use them? Your chapter minutes are public. Supplemental mailings are an inexpensive way to keep congregational coordinators, pastors, Thrivent Financial Associates, and others apprised of what's happening.

Mail Today

Section Summary: Get the Word Out!

Be Proactive, Be Visible

Plan ahead on how the chapter will use mailings to inform, publicize, and recognize.

Make the Most of Mailings

Use your free mailings effectively. Send quarterly newsletters that include contact/leader information, funding procedures, upcoming events, success stories, and volunteer recognition.

Make the Most of Minutes

You spend a lot of time on them. Why not use them? Create supplemental mailings to inform congregational coordinators, pastors, and Thrivent Financial Associates.

Section C: Resources to Help You

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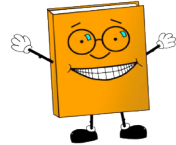
Online Resources

Get Started

1. Go to www.thrivent.com
2. Click Thrivent Community
3. Log-on (register if new user)
4. Click on Chapters
5. Click on Volunteer Leader Resources
6. Click on Chapter Leaders
7. Click on Chapter Leadership Administration

What's There

- Quick reference guides
- Glossaries
- Online training, tutorials
- Chapter publications
- Chapter resources
- Visibility Toolkit



CHIP Chapter Information Place

Your one-stop, online chapter reference tool.

- Records Director's roles and expectations
- How to create a newsletter
- How to track and record volunteer hours
- Information on chapter meetings and minutes
- Sample agendas
- Publicity tips
- Instructions on how to set up a teleconference
- Information on locally supported chapter activities
- Information on chapter Care Programs
- Information on chapter mailing service
- Fraternal highlights and service center information
- Logo usage
- Election basics
- Banking procedures
- How to fill vacancies
- Recognition ideas

And MUCH, MUCH MORE!

Helpful Telephone Numbers

National Fraternal Service Center

- Live help from the experts.
- 1-800-236-3736
- Monday-Tuesday: 8 a.m. to 10 p.m.
- Wednesday-Friday: 8 a.m. to 7 p.m.
- Or, email them at fraternal@thrivent.com.

Training Module Review

Section A:

The Records Director's Responsibilities

- Maintain chapter records
- Report locally supported chapter activities
- Chapter correspondence

Section B:

Get the Word Out!

- Be proactive, be visible
- Make the most of mailings
- Make the most of minutes

Section C:

Resources to Help You

- Thrivent online, CHIP
- Telephone numbers