

ANNUAL MEMBERSHIP REVIEW

Deacon Instruction Sheet

PURPOSE

One of the responsibilities the Book of Order gives to the Session is to “**review the roll of active members at least annually and to counsel with those who have neglected the responsibilities of membership.**” This is not simply an administrative task. It is part of how the church **nurtures the covenant community of disciples of Christ.**

Because deacons already have members assigned to their care, they play an essential role in this work. The better we know the people entrusted to us, the better we can care for them, and the more faithfully the church can maintain its membership rolls.

This process is about more than removing people from the roll. It is also about:

- strengthening relationships
- noticing when people have drifted away
- identifying pastoral needs
- listening with care
- helping the church respond truthfully and compassionately

A faithful membership roll should reflect **real relationship, real accountability, and real care.**

tone

This work should be approached in a way that is:

- pastoral
- respectful
- warm
- honest
- hopeful
- nonjudgmental

This is **not** about shaming people or simply cleaning up a list. This is about reaching out because people matter. The spirit of the contact should not be, “**Are you still one of us or not?**”

The spirit should be, “**We are reaching out because you matter, because the church cares about you, and because we want to understand your present relationship to this congregation.**”

YOUR ROLE AS A DEACON

Your role is to:

- contact the people in your assigned group
- listen carefully
- note their present relationship to the church
- identify any pastoral needs
- make a recommendation for further review

You are **not** making the final decision about membership status.

You are **not** removing anyone from the roll.

You are helping the church act with honesty, fairness, and compassion.

WHAT YOU ARE LISTENING FOR

As you make contact, you are trying to determine:

- Is this person still meaningfully connected to the life of this church?
- Is this person still participating, even if irregularly?
- Has this person drifted away from active participation?
- Has this person joined or settled into another church?
- Does this person need pastoral care, encouragement, or follow-up?

REVIEW CATEGORIES

Please place each person in one of these categories:

- **Active** – Still meaningfully connected to the church through worship, fellowship, service, giving, prayer, pastoral relationship, or other significant participation.
- **Borderline Active** – Still connected, but participation is diminished, inconsistent, or uncertain.
- **Stopped Coming** – Has not participated for a significant period of time and appears disconnected from the life of the congregation.
- **Joined Elsewhere** – Has joined another church, is clearly settled in another congregation, or has indicated they no longer intend to maintain active membership here.
- **Unable to Determine** – Insufficient information at this time, even after reasonable contact efforts.

REASONABLE EFFORT

Please make a genuine effort to contact each person in your assigned group.

When possible, use more than one method:

- phone call
- text
- email
- mailed note
- in-person conversation

If you do not reach someone on the first attempt, please try again. Recommendations should be based on real effort, not quick assumption.

SUGGESTED CONTACT LANGUAGE

“Hello, this is [Name], one of the deacons from First Presbyterian. I’m reaching out as part of our annual care and membership review. We’re trying to make sure we are in touch with everyone entrusted to our care and to understand how people are doing and what their current relationship with the church is. We want to care well for people and keep our records accurate.”

You might ask:

- How are you doing these days?
- Are you currently worshiping with First Presbyterian?
- Are you connected with another church at this time?
- Would you like to remain actively connected here?
- Are there any pastoral needs or concerns we should know about?

ANNUAL MEMBERSHIP REVIEW

Deacon Contact and Recommendation Report

Deacon Name: _____ Assigned Group: _____

Date Submitted: _____

MEMBER INFORMATION

Member Name: _____

Household / Family Name (if applicable): _____

Phone: _____ Email: _____

CONTACT RECORD

Attempt 1

Date: _____ Method: _____

Result: _____

Attempt 2

Date: _____ Method: _____

Result: _____

Attempt 3

Date: _____ Method: _____

Result: _____

If direct contact was made:

Date of conversation: _____

Spoke directly with: _____

CURRENT RELATIONSHIP ASSESSMENT

Check one:

- | | |
|--|--|
| <input type="checkbox"/> Active | <input type="checkbox"/> Joined Elsewhere |
| <input type="checkbox"/> Borderline Active | <input type="checkbox"/> Unable to Determine |
| <input type="checkbox"/> Stopped Coming | <input type="checkbox"/> Deceased |

RECOMMENDATION

Check one:

- Remain on active roll
- Remain on active roll, but encourage renewed participation
- Pastoral follow-up recommended
- Community Life follow-up recommended
- Consider inactive administrative status
- Recommend transfer / dismissal / removal from active roll
- No recommendation at this time; more contact needed

REASON FOR RECOMMENDATION

SUMMARY OF PRESENT RELATIONSHIP TO THE CHURCH

PASTORAL CONCERNS OR CARE NEEDS

Check any that apply:

- Pastoral visit requested
- Illness / hospitalization
- Grief / bereavement
- Homebound / mobility issues
- Transportation issues
- Family crisis
- Spiritual struggle / disconnection
- Would welcome renewed invitation to church life
- No known pastoral concerns
- Other: _____

Additional notes:

IF "JOINED ELSEWHERE" OR "RECOMMEND REMOVAL," PLEASE COMPLETE

- Person stated they have joined another church
- Person stated they are regularly attending elsewhere
- Person stated they no longer wish to remain an active member here
- Multiple contact attempts made with no response
- Other: _____

Brief explanation:

DEACON CERTIFICATION

I have made a good-faith effort to contact this person and have completed this form to the best of my knowledge with pastoral care, honesty, and fairness.

Deacon Signature: _____

Date: _____