First Unitarian Universalist Church Columbus, Ohio	Policies and Procedures
Chapter: II. Congregational Responsibilities	**Source: Stewardship and Membership**
Title: Membership Status Guidelines	
Approved by: Board of Trustees	**Date Approved: 6/23/10**
Effective Date: 6/23/10	**Date of Last Review: 6/23/10**

I. Responsibility:

Church Staff (primarily the Office Administrator), in coordination with Religious Education, Membership, Stewardship, and other committees, is responsible for updating the church membership database. Some volunteer support is/may be used for data entry.

The Membership Committee coordinates entry of new member information into the church database. Other input (updates) to the Church membership data base can come from a wide variety of sources throughout the church community and is routed through Church Staff (typically the Office Administrator).

II. Definitions:

A Member is a person 16 years of age or older, who agrees to support the church through a commitment of time, energy, and financial resources. The person must have signed the Membership Book and must not have subsequently resigned or been dropped by the Board of Trustees. Members may vote at official church meetings and are eligible to become a member of the Board or any committee. Members may chair any committee. Persons from the age of fourteen (14) to sixteen (16) years, who have successfully completed a coming of age or other transition or preparatory program/curriculum approved by the Religious Education Committee, and are prepared to make the same commitment, may sign the membership book following the same procedures.

An Associate Member is a person who supports the church financially, but has his/her primary affiliation with another Unitarian Universalist society. An Associate member is not entitled to vote.

A Courtesy listing entitles the recipient to complimentary delivery of the Newsletter (by US mail). SYC staff, other churches, and the UUA are in this category.

A Subscriber listing is for Visitors who have paid to receive the Newsletter by US Mail.

A Friend is a person who is not a member but who wants to be designated as a Friend and has contributed or pledged within the past year. A Friend may also be the spouse or partner of a member, who wishes to be designated as a Friend. A person may choose to become a Friend of the Church as an interim step to become a member, but in some cases may remain so indefinitely. Friends cannot vote or be elected to the Board of Trustees. Friends can participate in most Church committees but generally cannot chair a committee. Friends are typically welcome in most Church groups and activities.

Hardship: Members, Associate Members, and Friends may be excused by a Minister or the Chairman of the Board of Trustees from their financial responsibilities to the Church if either:

1) the person/pledge unit is deemed to be experiencing economic hardship, or

2) the person (typically a Senior Citizen) is deemed to lack the cognitive ability to formulate an appropriate pledge or financial contribution to the church. This is assumed to be a permanent condition and the individual's status qualified with a "Lifetime" description.

Economic Hardship: persons/households who have such restricted means that they have no discretionary funds available to them and are unable to make any contribution at all to the Church. Minister / Board Chair should make personal contact with these individuals to understand their financial situation before approval. Review of Economic hardship by Ministers is to be coordinated by Stewardship Committee at least once per year. Members, Friends and Associate Members can ask to be considered for economic hardship

A. Via a pledge form during the Annual Budget Drive
B. By contacting a Minister directly (at the church) or via any other means.
C. Via the Chaplain or Pastoral Care Team

Lifetime Hardship: Stewardship, the Pastoral Care Team or the Rolls Review Committee may make recommendations to the ministers for lifetime hardship considerations at any time during the year.

III. Methods for Record Keeping

Church staff will maintain the official database of member information. Among a variety of other information, the following will be tracked:

- Members who have joined during the month.
- Members who have resigned and moved out of town.
- Members who have resigned and not moved out of town.
- Members who have been "Dropped" from the church roster.
- Members with name, address, or phone number changes.
- Members who are deceased.
- Members who are experiencing "Hardship"

Church staff will publish a monthly membership report. Church staff will provide copies of the report to the ministers, Board chair, and to other individuals or committees that request it.

IV. Visitors

First UU Church welcomes all Visitors at its services and most of its programming and functions. Visitors may share their contact information and request the Newsletter. Visitors who make a significant contribution to the operating budget, or make a significant pledge to the church, will be sent a letter from Stewardship by the Administrative Assistant. The letter will explain their current status of Visitor and invite them to become a Friend of the church, explaining the benefits and commitments of that designation. Visitors must request to become a Friend before their status is changed.

V. Newsletter Policy

The Church Newsletter is available to all on the Church web site. Notification of new issues of the Newsletter will be emailed to all Members, Friends, Associate Members, Courtesy Members and Visitors that request to receive it and that have provided the church with an email address. Visitors may request the Newsletter at the Greeter's stand in the church gallery or by contacting the church office and providing the Church with their contact information.

Members, Friends, Associate Members, Courtesy Members and Visitors may request to receive, via US Mail, a hardcopy of the Newsletter.

After approximately three months of receiving the Newsletter by US Mail, the Administrative Assistant will send a letter to those Visitors receiving a hardcopy Newsletter. They will be invited to become a paid Subscriber. If they pay the newsletter subscription fee, the Administrative Assistant will change their status to Subscriber. If Visitors do not send the fee, they will no longer be sent the Newsletter by US Mail.

VI. Commitments of Members

A. Basic Commitments

Members shall make best efforts to do the following:

1. proactively keep the church office up to date with relevant information:
    a) mailing address
    b) phone numbers
    c) email address
    d) pledging relationships
    e) partner relationships (as they affect Church records)
    f) participating family members (children)
    g) change in Membership status (resignation or other)
2. give attention to church correspondence, including the church newsletter, for important announcements.
3. respond to formal church correspondence when requested
4. make best efforts to attend official church meetings and vote (annual meeting mid-year meeting, and special called meetings).
5. try to attend services regularly as possibly
6. wear a name-tag at services and at appropriate church functions
7. complete and submit a pledge form, annually, before the end of the Annual Budget Drive which includes an option to seek hardship exemption

B. Financial Commitment

1. Amount

The amount of financial support each member gives to the church depends on the individual and his/her financial situation.

Stewardship encourages those members who are able, to start on a course to build to a "five percent of personal income" annual contribution. Many cannot make that level of commitment. But most can find a way, through some personal sacrifice and/or thrift, to pledge and contribute something appropriate for their current financial situation.

2. Annual Contributions

Members commit to support the Church financially and are expected to contribute financially every Fiscal Year so the church can plan and operate. If they feel they are unable to contribute they can contact a Minister at the church to discuss a hardship exemption.

3. The Budget and Pledging

The church manages its finances via a Budget created annually.

In order to create the budget, to forecast income, the church relies on annual pledges to the operating budget. Although not strictly required, it is strongly recommended that all Members meet their "minimum" commitment of financial support by pledging to Annual Budget Drive and making associated contributions to fulfill that pledge.

But Members are asked to first help the church prepare its Budget by pledging and making associated contributions to the operating budget before considering Holiday Appeal or Capital campaign contributions.

4. Other Contributions

Supporting other elements of the Church (Social Justice, Auction, Fair Trade Coffee, Youth functions, Dance, Adult Enrichment Programs, etc) are appreciated but are not considered as fulfilling the minimum expectation of financial commitment to the church.

5. "Identifiable" Contributions

Contributions via basket or plate at services MUST be identifiable, either a check with the Member's name or in an envelope with the Member's name.

6. New Members

Membership Committee requires that new members complete and submit a pledge form before signing the Membership Book.

The Coming of Age program also requires its Youth members to complete and submit a pledge form before signing the Membership Book.

C. Time and Talent

In addition to supporting the church financially, Members are expected to give of themselves in terms of "time and talent", participating and volunteering as they feel appropriate to help the church continue to function.

VII. Commitments of Friends and Associate Members

Friends commitments are similar to Members except with respect to voting and certain restricted leadership functions (Board, committee chair roles, etc). Friends may feel their level of commitment to the church may not be as deep as Members, but this may grow over time.

Associate Members are not active so many of the commitments of Members mentioned above do not apply. But the commitment to keep the Church up to date with contact information, and to financially support the church still generally apply.

VIII. Discontinuing Members

Members may resign their membership in the following ways:

- By written notice from the member to the church.
- By verbal notice from the member to the church.

Stewardship Committee will be contacted (typically by the Administrative Assistant) to follow up with the member, as necessary/applicable. In the second case, a written correspondence will be sent to the member to confirm.

If a member moves out of the Central Ohio area without sending a formal resignation, Stewardship Committee Chair(s) will attempt to contact the member. Stewardship will wish them well and ask if they wish to remain members, change status to either Friend or Associate Member, pay off their pledge, continue receiving the newsletter, etc.

Members who fail to make a financial contribution at the minimum level set by the Board, unless that member is experiencing hardship, will be discontinued by action of the Board. The process for implementing this action is described below under the "Membership Rolls Review".

IX. Membership Rolls Review process

A. Preparation

Approximately one week after the end of the Fiscal Year, Stewardship Committee will obtain a detailed report from Church Staff (typically the Bookkeeper) on all contributions made (in the recently completed Fiscal Year) to

1. Church operating budget account
2. Holiday Appeal
3. Capital Campaign drive(s).

B. Friendly Reminder

Before starting the formal Rolls Review, Stewardship may choose to send "friendly reminder letters" to all Members, Friends and Associate Members that made no identifiable contribution during the completed Fiscal year.

1. The letter will remind these individuals about their financial responsibility to the church and ask them to make a contribution (fulfilling any pledge they may have made) for the recently completed Fiscal Year. A clear response date for the contribution, typically two to four weeks, will be indicated.
2. After the passing of this response date, Stewardship will obtain a new (current) contributions report from Church Staff (Bookkeeper), to include recent contributions made to the operating budget of the recently completed Fiscal Year.
3. The letter will be in addition to any “Giving Statement” sent by the Bookkeeper to those who have pledged but did not contribute.

C. **Formation of the Rolls Review Committee**

Stewardship will then coordinate the formation of the Rolls Review Committee. This committee shall consist of

1. Ministers
2. Chair of Stewardship Committee
3. Chair of Membership Committee
4. Member of Caring Committee (approved by committee chair)
5. Director (or Coordinator) of RE
6. a long-term member (15-20 year history with the church)

D. **Initial Review of Non-Contributors List**

All members of the Rolls Review Committee shall have the opportunity to review and comment on the list of members that had not contributed in the recently completed Fiscal Year.

Hardship recommendations may be made and submitted by the committee to the Minister(s) for approval.

Additional contact by committee members (including Ministers) or by other groups in the Church (eg, Pastoral Care team), may be recommended.

All committee feedback should be collected and compiled by Stewardship for later reference, consideration, and communication.

E. **First Meeting**

A substantial portion of the committee should then meet to consider all input and decide on “next steps”. (A meeting of all members of the committee is deemed impractical). This should include one minister if possible. All feedback on each and every member should be considered and appropriate follow-up coordinated (eg, hardship review by minister, contact by Minister, Pastoral Team or others).

For those Members who do not warrant individual, personal contact, the committee (subset) can proceed to determine what type of correspondence may be appropriate as a next step for the each member in question. Typical possibilities include but are not limited to:

1. Young Member/College Students- reminder letter

2. Active (regularly participating, volunteering members)- reminder letter
3. Inactive members: letter requesting their intent (“Letter of Intent” or LOI)

Language for the above correspondence shall be reviewed and approved by the committee (or the substantial subset described above). Response dates (two to four weeks out) should be clearly stated. For “LOIs”, a form clearly soliciting a contribution for the past Fiscal Year (and a pledge for the new Fiscal Year) OR resignation is recommended to reach closure.

F. **First Meeting Follow-up**

Stewardship will coordinate the follow-up to this meeting, including the mailing of letters and tracking of personal contact/follow-up with members. Stewardship should check with the Bookkeeper for recent contributions before mailing letters to these members.

As a result of the above described personal follow-up and correspondence, some of the members in question may submit their contributions for the previous year. Others may resign. Others may be approved for hardship exemption. Many may be unreachable or do not respond to correspondence. Stewardship should ensure that all status changes are clearly tracked and communicated to the Administrative Assistant as well as committee members.

After the response deadline included in correspondence has passed, Stewardship should schedule a follow-up meeting of the Rolls Review Committee (substantial subset). Before this next meeting, Stewardship should also check with Church Office (Administrative Assistant and Bookkeeper) as well as the signers of the letters for any responses from members.

G. **Second Meeting**

In the follow-up meeting, the Rolls Review Committee shall again consider each and every remaining non-contributing member. As mentioned, many may have been removed from the list after they contributed, resigned or were designated as hardship.

For those that did not respond to “Reminder” letters (eg, to Young Member/College Students or Active/regularly participating members), the committee may choose to take additional action by sending out the more formal “Letter of Intent” correspondence.

The committee may also choose to take different and or additional action, giving consideration to each individual member as it feels warranted/appropriate, while still honoring the intent of governance documents which set an expectation from members to financially support the church.

H. **Board Vote**

For those cases where no response was received to the “Letter of Intent”, the committee may choose to send a list to the Board of Trustees, recommending that these members be dropped from the membership rolls. This recommendation, with the accompanying list, should be sent by Stewardship to the Chair of the Board of Trustees, copying the Secretary of the Board and the full complement of the Rolls Review Committee. A request for a vote at the next Board meeting should be included.

Stewardship should follow-up with the Board. If the Board voted to drop the members from the Roster, then Stewardship should send the list to the Administrative Assistant requesting that the church database be updated.

I. **Additional Iterations**

As the above process implies, several iterations of contact and correspondence – with associated Rolls Review committee meetings- may be necessary to fully review and act upon the list of members who did not contribute in the previous Fiscal Year.

Although the above process has been described in significant detail, it should be understood that Stewardship Committee, the Rolls Review Committee, and the Board, have discretion and flexibility in how non-contributing members is addressed. The intent is to give due consideration to each individual Member, while still honoring the intent of governance documents which set an expectation for Members to financially support the church

J. Accountability/Monitoring

If the Rolls Review process is not performed on an annual basis, the list of members who move away without communicating grows. This complicates the Annual Budget Drive (attempting to reach such members) and wastes church resources.

To ensure that this scenario is avoided, the Rolls Review process should be undertaken and completed every year.

To avoid situations where, due to changes in committee leadership or other challenges, the process is not started, the Vice Chair of The Board is chartered to monitor the Rolls Review process. This monitoring is to determine that the process is started and executed in a reasonable timeframe during the year.

If the process is not started or executed in a timely fashion, the Vice Chair may recommend to the Board that additional resources (leadership, technical, etc) be found and introduced into the Rolls Review Committee, under the authority and direction of the Board.

X. Rolls Review of Friends and Associate Members

Friends and Associate Members are expected to pledge and contribute (support the Church financially).

In the process of reviewing Members who have not contributed in the recently completed Fiscal Year, Stewardship and the Rolls Review Committee may consider reviewing Friends and Associate Members who also have no identifiable contribution for the recently completed Fiscal Year.

The Rolls Review Committee may choose different criteria in reviewing these Friends and Associate Members (in contrast to reviewing Members). Correspondence will also differ. But hardship, either economic or “Lifetime” variants, are still a consideration for Friends and Associate

Members.

Final decisions to drop Friends or Associate Members from the church database should be accomplished by making a recommendation to the Board of Trustees, requesting a vote, as with Members

XI. Hardship Review

Economic hardship, unlike the Lifetime hardship exemption, is not considered a permanent situation.

All economic hardship cases (Members, Friends and Associate Members) should be reviewed at least once a year with Ministers. This should be done before the start of the Annual Budget Drive.

This is accomplished by Stewardship obtaining a report from the Bookkeeper of all Members, Friends and Associate Member households (Pledge units). Stewardship will extract all those designated as hardship cases from the list and send the list to the Ministers for their consideration.

Ministers may confirm the continued hardship, or provide other input, or inform Stewardship of their lack of insight into the individual / pledge unit's situation. In this laytter, Stewardship may call upon additional resources to try to gain insight.

Stewardship may also recommend other individual/pledge units to Ministers for economic hardship consideration.

Stewardship will contact the Administrative Assistant to make changes reflecting hardship status, copying the Ministers.

XII. Young Member/College Student Review

When Coming of Age students become members, their status in the database is qualified as a "Young Member / College Student". As years pass, this qualifier becomes less applicable or incorrect.

Stewardship should review this list annually and, using its best judgment, drop the qualifier when it becomes appropriate. Typically this is done when the member reaches an age of 23.

XIII. Detailed Membership Status Transitions

Associated with and an approved part of this policy document is a detailed list of valid "Membership Status Transitions". This list is kept on Church servers as:
"Membership Status Transitions.XLS"

Revision History

1. 3/25/99: Original, a Revision of the 1992 Guidelines: The First UU Membership Committee: Sue Johnson & Kim Woodard, Co-Chairs.
2. ??/??/10: Review, update, and expand (Dan Hronek)