

Auditing Membership Records

United Methodist Churches take membership vows and church membership quite seriously. Every name listed on our membership rolls represent a person important to Jesus Christ and important to the church.

One study found that 82% of people drop out of active membership during the first year.¹ The first twelve months are critical. This is one of the many reasons that annual auditing of membership records is so important.

While *The United Book of Discipline* outlines a length process for removing members, it also calls for the entire membership of a church to be engaged in contacting members. The section “Care of Members” (*2016 Book of Discipline*, ¶1228) outlines the importance of this: “The Church has a moral and spiritual obligation to nurture its nonparticipating and indifferent members and to lead them into an active church membership.”

An annual membership audit is required by *The Discipline*. The pastor is responsible for ensuring that all membership records are accurate and up-to-date. This report covers the period from the last church conference to the present church conference (*2016 Book of Discipline*, ¶1231).

The 2017-2020 United Methodist Membership Records Manual from Cokesbury, developed by the General Council on Finance and Administration, may be helpful in collecting the data. Each church is also to maintain a Constituency Roll with the names and addresses of nonmembers for whom it has pastoral responsibility; this includes children.

All professing and baptized members should have an individual “Record of Faith Journey.” Many churches have members complete their own forms with the pastoral staff. It is a way of starting conversation – and completing paperwork.

Question to consider as you are performing a membership audit.

- 1) Who will be responsible for auditing the records and making the report? Membership Secretary and Pastor? Others assisting? Will the report be made at an Administrative Council meeting before the Church/Charge Conference?
- 2) What membership software is being utilized? (See section below on some software being utilized by Oklahoma churches.) If paper records are being kept, what plans are there for moving to electronic storage?
- 3) Where is your permanent church register? Who is responsible for keeping it current? Is it kept up-to-date? Is there a back-up copy kept off site? Where? If there is no back-up copy, when will one be prepared?
- 4) When persons join in any manner, who is responsible for adding information to your permanent register? Does it happen in a timely fashion?

¹ <https://wesleyanseminary.wordpress.com/2011/10/09/why-do-people-drop-out-of-church-charles-arn/>.

Reconnecting with members

As a part of the membership audit, consider how you will reconnect, care for and nurture those who are a part of your membership but not actively participating.

This is where a thorough audit of the records is really important. Find people in the church (long-time members) to assist in going through the current permanent roll. These assistants will provide valuable insights in to those who have died or moved away as well as those who still live in the area but just are no longer participating.

- 5) Update those you can verify have died but have not been removed from the rolls. Locate/update addresses for those who are inactive.
- 6) Develop a plan of care to reconnect with those who are no longer participating through various communication channels, both electronic and written. First contact should not be about membership but about care and invitation. Leave the door wide open for people to come back into our churches.

United Methodist Bishop Ken Carder said, “The first step in re-energizing inactive members is to know who they are and being attentive to their stories. People become inactive for multiple reasons, and the reasons have to be taken seriously. The reasons vary from mere apathy to outright hostility resulting from conflict and alienation. Behind every person who drops out of church, there is a unique story, or at least a unique twist to a familiar story. Meeting them where they are and taking their experiences seriously opens up possibilities for reconnecting to the community of faith.”

The first contact is not about removal of inactive members but on outreach and reconnection; a time of invitation and renewed welcome. For the removal process, see the applicable disciplinary paragraphs below.

Closing gaps in record-keeping

1. Purchase and share *The United Methodist Church Membership Records Manual* with those involved in record-keeping. Also share the OKUMC membership records hub.
2. Report the status of membership records at least once per year at a meeting of the Church Council. This is the responsibility of the Membership Secretary.
3. Follow a Plan for Care of members developed by the appointed pastoral leadership in conjunction with the appropriate church committee(s).
4. Be faithful in preparing required reports.

Implementation suggestions

The following suggestions will help implement this approach:

- **Review absentees quarterly.** Have the witness ministries or evangelism ministry group review absentees quarterly. A smaller church can do this on a less formal scale.
- **Check church school attendance lists** to determine participation in education groups, study classes, short-term groups, and youth activities. Also find out which members are active in United Methodist Women, United Methodist Men, or United Methodist Youth Fellowship.
- **Submit the inactive list to the financial secretary** to identify persons with an identifiable record of giving.
- **Prepare a list of nonresident persons** to determine those who are inactive because of distance from the church.
- **Keep updated lists of shut-ins** and persons who are confined to their homes, hospitals, or other places.
- **Develop a program to follow up on absentees before a full year of inactivity has occurred.** In most of our small churches, this follow-up can be done easily and informally if it is made a top priority.²

What should the membership report at charge conference look like?

The Oklahoma Conference utilizes a consolidated electronic charge conference form. You can see an example here: <https://okumc-reg.brtaapp.com/ConsolidatedChargeConferenceForm>. The following questions are asked:

- List those who have been received into baptized membership since the last report.
- How many of these people were under 18 years of age?
- List the names of those who have been received into professing membership since the last report by Profession of Faith or Restored.
- List the names of those who have been received into professing membership since the last report from other United Methodist churches.
- List the names of those who have been received into professing membership since the last report from non-United Methodist churches.
- List the names of those who have been removed from professing membership since the last report by action of the Charge Conference or Trial Court, or by Withdrawal.
- List the names of those who have been removed from professing membership since the last report by transfer to other United Methodist churches.
- List the names of those who have been removed from professing membership since the last report by transfer to non-United Methodist churches.
- List the names of those who have been removed from professing membership since the last report by death.

² 2017-2020 United Methodist Church Membership Records Manual, pg. 10.

The final membership question is whether or not the membership rolls have been audited. If the answer is no, a second box will appear asking why the rolls have not been audited. This is a very important process for our church.

Helpful articles and resources

- *The United Methodist Church Membership Records Manual 2017-2020* (available as a download from Cokesbury)
- OKUMC membership web portal filled with resources—
<http://www.okumc.org/membershiprecords>
- Pastoral Care tips—
<http://www.umcom.org/learn/pastoral-care-tips-avoid-overlooking-people-in-need>

Membership Definitions and Software

Membership Definitions:

The 2004 General Conference redefined membership in the United Methodist Church. It abolished the old classifications – Full Members and Preparatory Members – and replaced them with new ones: Professing Members and Baptized Members.

- Baptized member: A baptized member is a person who has received the sacrament of baptism in a United Methodist Church or has received Christian baptism in another denomination and later transferred to a United Methodist Church. → replaced preparatory member
- Professing member: A professing member is a baptized person who has taken vows declaring the Christian faith. → replaced full member

Many current church management software programs can be modified with the new terminology and the needed information fields to keep these records digitally, making record-keeping quick and efficient.

Membership Software

- ACS Technologies (Realm) <http://www.acstechnologies.com/>
- Cahaba Creek Caba Works <http://www.cahabacreek.com/index.htm>
- Church Data Master <http://www.cdmplus.com/>
- Church Windows <https://churchwindows.com/>
- Membership Edge <https://www.membershipedge.com/>
- PowerChurch <https://www.powerchurch.com/>
- RDS <http://rdsadvantage.com/>
- Servant Keeper <https://www.servantpc.com/>
- Shelby <https://www.shelbysystems.com/>

Disciplinary paragraphs

¶215 – [Definition of Membership](#)

¶228 – [Care of Members](#)

¶230 – [Membership Records](#)

¶231 – [Annual Membership Report and Audit](#)

¶233 – [Permanent Records](#)

¶s235-242 – [Changes in Church Membership or Local Church Membership](#)