

# Inactivation Procedure

**Purpose:** To maintain an efficient and relevant database by identifying and managing disengaged individuals, ensuring that only actively engaged members are listed in the primary community database.

**Scope:** This procedure governs how profiles with status Disengaged or Members of the Community Members are made inactive.

## Procedure for Inactivating Newcomers, Seekers, and Travelers

Every Quarter Engagement Coordinator or Admin Designate will run these clean up lists after the Quarterly Membership Status Review Meeting.

### **Profiles with Membership Type: Disengaged**

Disengaged profiles will be made 'Inactive' one year after an individual's Disengaged date. (c.f. disengaged status criteria). The reason will be Unresponsive / Disengaged Clean Up.

#### [Disengaged Clean Up List](#)

### **Profiles with membership type: Community Member / Member of Another Congregation**

Community Member / Member of Another Congregation profiles will be made inactive One year after their last activity however if they are a member of an active PCO group they will be kept as active, or registered for any event in the last month, or they have a note in their profile.

They will be made inactive, reason: community member cleanup.

List must be manually cleaned up [Community Member Clean Up List](#).

#### **1. Classification of Disengaged Individuals:**

##### **• Criteria for Marking Disengagement:**

- **Newcomer:** 3 consecutive months of no activity.
- **Seeker:** 6 consecutive months of no activity.
- **Traveler:** 9 consecutive months of no activity.
- Once an individual meets the above criteria, they are marked as 'disengaged' in the database. The date on which they are marked disengaged is recorded as the 'disengaged date'.

## Procedure for Inactivating Members

On an annual basis, assess the membership list to determine classification according to the following definitions:

**Member**- Active engagement, Financial Giving Requirement Met (Pledge, Donation, Waiver) , W/ Voting Rights

**Inactive Member** - Inactive engagement determination, not meet financial giving requirement, no voting rights, status confirmed by inactivity not by action of congregant or board

**Former Member** - Removed from membership by congregant or board action.

## Annual Actions

1. Members not giving or engaging (in the last 12 months, not: attending worship, giving, registering for events, or part of an active group)
  - Jan/February - [Add to Annual Review of Inactive Members Workflow](#) and initiate checkin from Caring Listeners to members of [LIST: Inactive Members for Pastoral Checkin Q1](#), with the goal of making sure the member is well and discovering any needs. Mark as Lifetime Membership if they meet the criteria; if not, refer for further pastoral checkin.
  - March - Send letter from board inquiring after member's welfare, offering reminder that reengagement is required by May 1st in order to be eligible to participate in the upcoming Congregational Meeting, and that if the member does not reengage by the end of the year, membership will shift to Inactive status, and, inviting the member to reengage [TEMPLATE: Not Giving Inactive Membership Letter Spring 2024](#)
  - May - send notice of upcoming Congregational Meeting with reminder that engagement is needed 30 days before meeting to ensure eligibility to vote
  - November - reach out as part of annual pledge drive, including reminders that reactivating giving is a way to maintain eligibility to participate in congregational governance
  - January - send notice to all those still on the list that their status is shifting to Inactive Member, then move to "Former Member" status in PCO according to the steps in the Annual Review of Inactive Members Workflow. EMAIL TEMPLATE in PCO: "Shifting your Foothills UU membership to Inactive status"
  - If still inactive 3 months after being marked as Former Member, do a manual review to check for known information or extenuating circumstances that indicate the profile should stay active, then set profile to inactive, according to [LIST "Disengaged Former Members"](#) (MAKE THIS PART OF THE JANUARY STATUS SHIFT REVIEW)
2. Members who are giving but not otherwise engaging (in the last 12 months, only action is giving, and not attending worship, registering for events, or part of an active group)
  - February - assign to Partnership Team for invitation to express gratitude for giving and invite reengagement beyond giving [LIST: Annual Review of Members Giving but Disengaged](#)
3. Members who are not giving but are otherwise engaging

- February - send letter from Board offering giving waiver [LIST: Annual Review of Members Not Giving but Engaged](#) TEMPLATE "[Active\\_Not Giving\\_Membership Letter Spring 2024](#)"

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