

Policies & Procedures Annual Review

Review Date: _____ Last Policy Review Date: _____

Facilitator / Lead Reviewer: _____

Attendees: _____

Purpose Reminder: This worksheet helps document your annual review of church policies and procedures to ensure accuracy, safety, legal compliance, and effective ministry practices.

Leadership, Legal & Administrative Updates

1. Have we had any staffing, leadership, or church hierarchy changes that require updates to reporting structures, supervision, or points of contact?

- No changes
- Yes — describe updates needed:

2. Have our insurance provider or coverage requirements changed?

- No
- Yes — describe:

3. Has our legal counsel changed? If so, should updated policies be reviewed by legal counsel?

- No
- Yes — action needed:

4. Have any local, state, or federal laws changed related to mandatory reporting, background checks, transportation, supervision, or safety?

- No
- Yes — specify:

5. Have any emergency contact numbers or reporting phone numbers changed?

- Yes
- Needs updating — list changes:

Facilities, Programming & Operations

6. Has our building or property undergone any structural changes that affect how or where ministries meet? (Example: new education wing, updated entrances/exits, bathroom access, security flow, classroom locations, etc.)

- No
- Yes — describe:

7. Have we added new ministries, programs, or activities that require new policies or risk assessment? (Examples: mentoring programs, off-site events, camps, transportation ministry, new technology usage, special needs ministry, etc.)

- No
- Yes — list and policy needs:

8. Have transportation practices changed (church vans, carpools, field trips, overnight events)?

- No changes
- Updates needed:

9. Have we updated emergency procedures (medical emergencies, severe weather, lockdowns, evacuation, missing child)?

- Current
- Needs updating — notes:

Safety, Training & Compliance

10. Are all required background checks current and documented for staff and volunteers?

- Yes
- Needs review — notes:

11. Are volunteer screening and onboarding processes being followed consistently?

- Yes
- Gaps identified — explain:

12. Have all staff and volunteers received required safety and abuse prevention training? Are refresher trainings needed?

- Yes
- Refresher needed — who / when:

13. Have there been any policy violations, incidents, or near-misses in the past year?

- No
- Yes — were they documented? Summary and policy implications:

14. Are digital communication policies (texting, social media, photos, livestreaming, online platforms) still appropriate and being followed?

- Yes
- Needs review:

15. Are policies accessible and clearly communicated to staff and volunteers?

- Yes
- Improvements needed — describe:

16. Have all current volunteers signed off on agreeing to the policies and procedures?

- Yes
- Improvements needed — describe:

Implementation & Alignment

17. Are policies being followed as written?

- Yes
- No — explain discrepancies:

18. Are there areas where practice differs from policy? If so, do staff and volunteers need refresher training, or does the policy need revision to reflect safe and approved practice?

- Yes
- No — explain discrepancies:

19. Have we received feedback from leadership, staff, volunteers, parents, or congregation members that should be considered?

- No
- Yes — summarize:

20. Do policies adequately address inclusion, medical needs, allergies, and accommodations for children and vulnerable individuals?

- Yes
- Needs improvement — notes:

Don't forget to:

- Document any changes made.
- Record the annual review meeting (date, attendees, summary notes, action items).
- Update the policy revision date.
- Communicate any changes to staff and volunteers.
- Schedule any necessary training or follow-up actions.