Care Team Guidelines

Fill in the blanks, change what does not fit your church or synagogue, and ask every team member to read and sign these guidelines once a year.

Name of our team: _____

Church or synagogue: _____

Adopted on: _____ **Review again on:** _____

1 Our Purpose

Our team helps our pastor care for _____. We visit, call, write, bring meals and pray, so that no one in our care is missed. We do not replace the pastor. We tell the pastor about needs that only a pastor can meet.

2 Our Roles

Role	Name	Phone or email
Pastor		
Team lead		
Visitors		
Callers		
Card writers		
Meal coordinator		
Prayer team		

Each member serves a term of _____ (for example, one year). At the end of a term, each member can continue, change roles, or rest.

3 How a Need Comes to Us

People ask for care by _____.

The team lead assigns each need to **one person** with **one date** within _____ days.

4 Confidentiality

- [ ] What a person tells us stays with us, the team lead and the pastor.
- [ ] We ask before we share a prayer request: "May I share this with our prayer team?"
- [ ] We do not put care details in group texts, bulletins or email chains.
- [ ] Confidentiality is not secrecy. If a person is in danger, or the law requires a report, we tell the pastor.

5 Boundaries

- [ ] We do not give medical, legal or financial advice.
- [ ] We do not lend or give our own money. Money needs go to _____.
- [ ] We keep visits short, unless the person asks us to stay.
- [ ] Our rule for visits alone, at home or at night: _____
- [ ] We are not on call all day. In an emergency, people call _____.
- [ ] We tell the team lead before we start a long care relationship.

6 When We Refer a Need to the Pastor

We tell the pastor **the same day** when a person:

- [ ] has a death in the family
- [ ] gets a terminal diagnosis
- [ ] asks for sacraments or a blessing
- [ ] talks about a crisis of faith
- [ ] talks about trouble in a marriage
- [ ] has a conflict with a church leader
- [ ] tells us something we are unsure of
- [ ] _____

The best way to reach the pastor: _____

7 Our Referral List

Need	Who	Phone
Suicide or mental health crisis	988 Suicide & Crisis Lifeline	Call or text 988
Immediate danger	Emergency services	911
Counseling		
Grief support group		
Addiction recovery		
Food or money help		
Services for older adults		

8 If We Suspect Abuse

Many states name clergy as mandated reporters of child abuse, and some states require any person to report. Know your state law and your church policy.

- [ ] We tell the pastor **the same day** if we suspect abuse of a child or a vulnerable adult.
- [ ] We write down what we saw and heard, in the person's own words, with the date.
- [ ] Our state abuse hotline: _____
- [ ] The person who makes the report: _____

> Ask your denomination or an attorney to check this section. This template is not legal advice.

9 Care Notes

- [ ] After each visit or call, we write two or three sentences: the date, the type of contact, the need, and the next step.
- [ ] We write facts, not opinions or guesses about health.
- [ ] We mark sensitive notes so that only the pastor and care leaders can read them.
- [ ] We keep notes in one shared place: _____

10 Our Meeting Rhythm

We meet every _____ on _____ at _____ in _____.

Agenda: pray for the care list, review new needs and open follow-ups, assign each need to one person with one date, learn one short topic, share one good story.

The team lead talks with the pastor every _____.

11 Our Promise

I have read these guidelines. I will follow them, and I will ask the team lead when I am not sure.

Name	Signature	Date