

Personnel Guidelines for Congregations and Session Personnel Committees within California



Prepared by the Synod of the Pacific, 2012

Resources referenced and suggested include:

Synod of the Pacific Office, Petaluma, CA (800) 754-0669

Synod of the Pacific Administrative Manual (www.synodpacific.org)

Churchwide Personnel Services, The General Assembly Council, Presbyterian Church (U.S.A.), National Ministries Division (www.pcusa.org/resource, search Personnel)

HR California, California Chamber of Commerce (www.calchamber.com/hrcalifornia)

The Personnel Perspective, Santa Rosa, CA (www.personnelperspective.com)

Tax Guide for Ministers & Churches, The Board of Pensions of the Presbyterian Church (U.S.A.) (www.pensions.org, click Publications and Taxes)

Church Law and Tax Update (www.ChristianityToday.org)

Church Insurance Carriers & Brokers (contact church workers compensation and/or health insurance)

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Introduction

The guidelines in this booklet are offered as help to sessions as they work in fulfilling the Book of Order responsibilities and Employer responsibilities both federally and within their state. These are guidelines and suggestions only; they are not meant to be rules or mandates and will need to be adapted to fit each individual situation. Due to the complexity of employment law, it is recommended to seek the guidance of an employment attorney.

Book of Order G-3.0201c

...The session . . . has the responsibility and power to: . . . nurture the covenant community of disciples of Christ...shall include...employing the administrative staff of the congregation.

Book of Order G-3.0110 Administrative Staff

Councils higher than the session may employ such staff as is required by the mission of the body in accordance with the principles of unity in diversity (F-1.0403)...A council shall make provision in its manual of administrative operations (G-3.0106) for the process of electing executive staff and the hiring of other staff, the description of the responsibilities of the positions, the method of performance review, and the manner of termination of employment.

Please note that the term Pastor is used throughout much of this Manual for simplicity in Job Titles, understanding that they are now a Teaching Elder within PC (U.S.A).

Human Resource Management Philosophy

Underpinning human resource management are the ideas that people have a right to proper treatment as dignified human beings while at work, that they are only effective as employees when their job-related personal needs are met, and that this will not happen without personnel management intervention in the everyday manager/subordinate relationships. Although the number of employees and the size of organizations may vary greatly, the importance of having personnel policies is almost equally important for every size of organization. Some state and federal laws, processes and record keeping requirements may be different depending on the size and location of the organization. However, the purpose and need for appropriate human resource management is equally important for almost any organization.

A Human Resource Management Philosophy can be articulated through the following definition:

Personnel Management is a series of activities which: first enable working people and the business/organization which use their skills to agree about the objectives and nature of their working relationship and, secondly, ensures that the agreement is fulfilled.

In order for the philosophy to be implemented, we need to set strategy and policy-making within a framework of management actions:

Mission – What is the organization for? Where is it going? Discussion and agreement on its mission is a precursor of policy. It is general and visionary.

Strategy – The mission is then continuously implemented by developing a program of initiatives to define and achieve the organization's objectives.

Policy – The overall mission and strategy are guided by a series of policies to channel decision and action, shaping the organization and providing the direction that is needed.

Procedures – Activities that implement the policy.

Thus a Human Resource Management Philosophy is the foundational guide to the development and implementation of any organization's personnel policies and guidelines.

As an example, the following is the Synod of the Pacific's Human Resource Management philosophy:

Mission Statement: Confessing Jesus Christ as Lord, empowered by God through the Holy Spirit, guided by Holy Scriptures, we, the Synod of the Pacific, Presbyterian Church (U.S.A.), seek to be faithful stewards of the material, human and spiritual resources of the presbyteries that we serve.

Guiding Principles: *Services and Resources:* The Synod will seek out the means to express and support partnership with the presbyteries and encourage such mission activity as might be done by more than a single mission council. Through consultations, the Synod and presbyteries, or clusters of presbyteries, will examine the expressed needs of mission and, when necessary, will create services, structures and resources.

Style of Leadership: The style of leadership in the Synod is best understood in words such as creative, sensitive, versatile and visionary. In these critical days in the life of the church, openness and flexibility are basic requirements, as is the ability to make clear decisions in inclusive processes. Respect for those with differing ideas and situations, consideration of new ideas and calls for change and mediation in conflict situations are the hallmarks of a Christian community working for reconciliation and renewal.

Inclusiveness: The Synod is a family of multiple ethnic backgrounds and faith experiences from vastly different geographic locations. As a family, the Synod is called to model for the whole church a pattern of loving inclusiveness, which will demonstrate the value of the unique contribution of each individual, and each group. Diversity is a gift of God and is this Synod's most important strength.

Personnel Committees

To assist them in implementing their Book of Order responsibilities, many sessions provide for the development of a Personnel Committee. Other sessions use a short-term personnel task force to work on specific matters. To determine the need for a personnel committee, sessions should consider the size of congregation, size of a session, number of pastors/Teaching Elders, number of staff and the needs of lay employees and ministers for such a committee.

A session personnel committee can provide an orderly, focused and considerate way for sessions to build a healthy work environment, including recommendations to the session of personnel policies, procedures and practices.

In churches where there is a head of staff, it is important that the session personnel committee not interfere with the ongoing supervision that the head of staff provides. In such situations the personnel committee works in a supportive and counseling relationship with the head of staff and with other staff, as needed. The term pastor is a Teaching Elder and can refer to either the sole pastor, associate pastor and/or the head of a staff. The term staff refers to all persons employed by the session: Teaching Elders or lay people, full-time or part-time and support or program staff.

In a church served by one pastor, the session personnel committee will function differently from a committee in a church with a larger pastoral staff. Still, the principles are the same.

Forming a Personnel Committee

Any session member can suggest the formation of a personnel committee, which consists of three to five members appointed by the session. They can be members of the session or others from the congregation, although a session member will often serve as chair. The church's pastor is an ex-officio member, though on occasion it is advisable for the committee to meet without the pastor. However, the pastor should always be informed of a committee's plan to meet and of its agenda.

All members should be able to keep confidences and be supportive of people and the church. They should be open minded, fair handed and reasonable.

The session personnel committee should hold regular meetings with an established agenda, and committee members should be a part of the normal rotation process of the session. If the session has a Manual of Operations, the personnel committee job description should be included in the manual.

See Appendix A for a sample job description of a Session Personnel Committee.

Personnel Committee Responsibilities

The session personnel committee typically has some of the following responsibilities:

Recommend position descriptions for all staff.

Review and recommend to session compensation packages for all staff.

Recommend to session and maintain personnel policies.

Encourage professional growth and development for all staff.

Recommend to the session ways to manage risk exposures, including proper sexual-misconduct prevention trainings.

Implement a plan of equal employment opportunities, developed in consultation with the presbytery and approved by the session.

Provide for a review process to assist in work planning.

Conduct performance evaluation of Head of Staff; receive reports from Head of Staff on other performance evaluations.

Ensure that personnel files are maintained appropriately.

Act as a support group for the pastor and other members of the staff.

Confer with the pastor on any important issues of concern.

Retain an attorney to advise committee and head of staff on all of the above, as needed

Regularly assess adherence to HR philosophy/mission statement and the mission and ministry of the congregation.

Some words of caution:

It is easy for a session personnel committee to get caught up in controversy, which is why members should be open-minded, fair-handed and reasonable. Because a personnel committee can be used by disgruntled individuals and groups as a power play to “get at” someone, it is important that the committee and its members act with caution and with forth-rightness in all matters. They should be aware of the limitations of their power and remember that they serve in an advisory capacity to the session. The session is responsible for the overall health and ministry of the congregation.

Adopting Personnel Policies

Personnel policies and procedures are essential whether a church has one or many employees and are applicable to all employees, whether full-time, part-time or seasonal and volunteer. Such policies should therefore be adopted by the session and reviewed and updated on a regular basis. Once a session has adopted a set of personnel policies, each staff member should be given a copy and required to return a 'Receipt and Acknowledgment' page. Personnel Policies & Procedures will include a variety of legal requirements as well as procedures and best-practices for an organization.

There are many Federal and State Employment Laws governed by a handful of agencies. The most common are:

Federal: U.S. Department of Labor (DOL), Equal Employment Opportunity Commission (EEOC), Occupational Safety and Health Administration (OSHA) and Internal Revenue Service (IRS)

State: Employment Development Department (EDD), Department of Fair Employment & Housing (DFEH), California Occupational Safety and Health Administration (CalOSHA), California Department of Industrial Relations and Industrial Welfare Commission (IWC),

Laws and courts exempt religious organizations from some provisions of employment laws only where the exemption is necessary in connection with the church's ecclesiastical function. For instance, religious organizations can discriminate on the basis of religion, when it is a bona fide occupational requirement, such as for Pastors or Christian Educators.

Other distinctions:

Overtime: State and Federal overtime laws do apply to churches. If a non-exempt employee works more than 8 hours in a day or 40 hours a week, the employee must be paid time and a half for the excess hours. There is more about this in the section relating to Exempt vs. Non-Exempt on page 8.

Social Security: The church must pay FICA (Social Security & Medicare taxes) on all non-ordained staff on its payroll. However, it does not pay FICA taxes for ministers who are classified as self-employed under Social Security law (they pay their own self-employed Social Security tax).

Optional:

Unemployment Insurance: In some states, including California, churches are not required to participate in FUTA or SUI (federal and state unemployment insurance); they can do so on a voluntary basis. Instead, a church may want to have a severance-pay policy in place in the case of reductions-in-force.

State Disability Insurance (SDI): In some states, including California, churches are not required to participate in state-mandated disability insurance; they can do so on a voluntary basis. Instead a church may want to provide a comparable disability plan for its employees.

Here is a set of basic Personnel Policies recommended for a Manual:

Equal Employment Opportunity
Process of Employment
Legally Required Employment Documents
Employee Classifications
Exempt and Non-Exempt Categories
At-will Employer
Introductory Period
Work Week
Time-tracking for Non-exempt Staff
Meal and Rest Periods
Dress Code and Personal Appearance
Compensation Philosophy
Pay Practices
Annual Performance Reviews
Benefits
Social Security
Pension/Retirement Plan
Health Insurance
Vacation/Paid-time off
Holidays
Workers' Compensation Insurance
Sick Leave
Disability Leave (short term or long term)
Leaves of Absence (with or without pay)
Other Legally Required Time off
Study Leaves/Sabbaticals
Safety in the Workplace
Sexual Misconduct
Grievances
Corrective Action
Termination
Conflict of Interest
Alcohol and Drug Use
Smoking Policy
Use of Electronic Media
Personnel Records
Handbook Acknowledgement and Receipt
Required Employment and Labor Law Posters

Many of these policies are reviewed further in Appendix B.

Along with solid Personnel policies and procedures, it is important to maintain proper record-keeping and employee files. **There are a few different types of Personnel files.**

General Employee File: (these mostly apply to the "Job" and would be available for the employee to review, upon reasonable request)

(Note: none of these documents should include a social-security number)

Employment application and biographical data

Current position description
Annual performance reviews and work goals, as presented to employee
Corrective Action, if applicable
Work history, showing positions held, work schedule
Salary records including dates and amounts of increases
Vacation and study leave records
Termination Information

Confidential Employee File: (these items mostly relate to the “Person” and the information is kept separate and not available for general review)

Any benefit plan participation, medical, dependent, beneficiary, ADA accommodations and leave-of-absence information for an employee,

Another Confidential file would include interview and selection information along with employment references and ratings received from others during the annual appraisal process.

Subject Files: (these files each hold one subject, papers filed alphabetically by employee within same folder)

W-4s and tax documents

Employment eligibility (I-9 documents)

Workers Compensation claims

Wage attachment/garnishment notices, if applicable

Legal investigation information, if applicable

Special Considerations - The following two topics are looked at closely by the IRS and require attention.

Exempt or Non-Exempt

Because it is highly litigated, understanding the distinction between exempt and nonexempt employees is critical. The Exemption refers to an employee being ‘exempt’ from wage and hour requirements, including the payment of overtime. Generally, exempt employees are your key personnel with management and decision-making responsibilities. Always assume employees are nonexempt unless they clearly meet the job duties of an exempt position and will earn at least two times the current minimum wage on a monthly basis.

Remember that all non-exempt employees will need to fill out time sheets.

In a church setting, it is likely that the only exempt staff would be the Pastor and possibly the Business Manger and/or Office Manager; these might fall under the Executive, Administrative or Professional Exemption. If you are unsure about the status of a particular position, ask an employment law expert or attorney to review your determination.

Employee or Contractor

Determining employment classification is very important. Most church staff will be W-2 employees, not independent contractors.

The relationship between an independent contractor and a principal differs significantly from an employee/employer relationship. The difference is largely in the degree of control over the person performing the services and the multitude of obligations an employer has to an employee which are not part of the independent contractor relationship. There are many guides and checklists available online to help you with the determination, but some of the key factors used in determining employee or independent contractor status include whether or not the employer ultimately controls how and when the worker performs the work, if the worker works for many companies, whether or not training is needed and whether or not the worker performs work that is performed by other employees. Payments to Independent Contractors are reported on a 1099 form at the end of the year.

Position Descriptions

It is recommended that each employee have a clearly written position description and it is helpful if all of the position descriptions are organized in a uniform manner. From there, the Performance Review form can be laid out accordingly. Also, it is important to review the position description with the employee at least annually to address any changes to job responsibilities and expectations.

Each position description should include the following elements: (see samples in Appendix E)

Title - The title suggests the general area for which the position is responsible. Examples include pastor, co-pastor, associate pastor for congregational nurture, director of Christian education, commissioned lay pastor, administrative assistant, business manager, financial secretary, sexton and preschool teacher.

Status – Exempt/non-exempt, Salaried/hourly

Purpose - A one sentence statement that describes the primary purpose of the position.

Accountability – Specify to whom the position is accountable. For example, a pastor is primarily accountable to the presbytery, but also to the session and congregation. Support staff may be accountable to the business manager or to the pastor as head-of-staff.

Responsibilities - These include all duties and activities that pertain to the position.

Performance Expectations - Based on the above responsibilities, list applicable expectations.

Relationships - Describe briefly how the person in this position is expected to relate to the session, other official bodies, committees within the congregation and other members of the staff.

Evaluation - State the manner of evaluation to be used as well as how compensation will be reviewed.

Employment Terms

Education and Experience Needed

Skills, Knowledge and Abilities Needed

Physical Requirements

Effective Date

Temporary Pastoral Relationships

The Book of Order describes several temporary pastoral relationships that may be established in cooperation with the presbytery. Such as:

Stated Supply

Interim Pastor

Interim Associate Pastor

Temporary Supply

Organizing Pastor
Parish Associate
Commissioned Lay Pastor

Most of the above positions will require actions by the presbytery. Consult the *Book of Order* and the Committee on Ministry.

Process of Employment

It is helpful to have a written hiring process that includes how the position descriptions will be written and revised, the advertising and search process (this may vary depending on the type of position), the interview process, the internal candidate-selection process and how an offer will be extended.

Compensation

For Teaching Elders, compensation consists of salary and housing to which other benefits and expenses may be added. Presbyteries usually have guidelines to assist in setting salaries for church employees so consult with the presbytery Committee on Ministry concerning guidelines and minimum standards for compensation. Your presbytery will have to approve all compensation packages for Ministers of Word and Sacrament and because changes in compensation packages represent a change in the terms of call, the congregation must also act upon them.

Housing is usually provided in a manse or a housing allowance. If a housing allowance is provided in lieu of a manse, the following apply:

1. The Internal Revenue Code allows ordained ministers to exclude from gross income for tax purposes, if designated in advance by the employer, any housing allowance paid as part of compensation when that allowance is used for specified purposes. The responsibility for accurate estimates of the housing allowance and payment of applicable taxes rests solely with the employee.
2. Specified purposes for which a housing allowance may be used are:
 - a. Rental of a home
 - b. Purchase of a home including: down payment, mortgage, legal fees, fees for title search, installment payments, interest, taxes, fire and home liability insurance premiums, and repairs.
 - c. Operating costs of home, such as utilities, home furnishings, attached garage, sidewalks, front and back yards but excluding costs for food or domestic help.
 - d. All of the above is compared to fair rental value and estimated utilities and whichever is lower is operative.

Many presbyteries have minimum standards and guidelines for compensation of church educators.

You might base compensation for other lay employees on the standards existing in your community. In addition to Presbytery guidance, the Synod office maintains some salary range information for administrative positions and you can seek advice from other congregations in the area.

In all compensation considerations, adequacy and fairness should prevail. All compensation should be reviewed annually.

Benefits

It is important to determine benefit eligibility of staff. Many churches within PC (U.S.A.) provide benefits for staff working at least 20 hours per week.

The only mandatory benefits that apply to all employees are Social Security & Medicare (FICA) (some clergy exceptions), Workers Compensation Insurance and a few mandated types of Leaves of Absence. However there are several standard benefits that an employing congregation could offer. These include Vacation and Sick Leave, Paid Holidays, Health Insurance (Medical, Dental, Vision), Pension or Retirement Plan, Leaves of Absence and Professional Development.

In some states, including California, churches are not required to participate in FUTA or SUI (federal and state unemployment insurance) or State Disability Insurance (SDI); they can do so on a voluntary basis. Instead, a church may want to have a severance-pay policy and/or disability plan in place for its employees.

Annual Performance Reviews

Once a staff member has a current, clearly defined position description and has developed and followed an annual work plan with the session's priorities in mind, the review process will be easy to implement. Rather than being punitive, this process should help persons grow in their work and find satisfaction in what they do. In a sense, the review process is a ritual that should be ongoing, providing employee feedback and support throughout the year.

The following is a possible performance review process. See Appendix F for sample review forms.

- Supervisor and/or personnel committee prepare the annual Performance Review Form (samples attached).
- Obtain feedback from persons the employee has worked with closely.
- Have employee prepare a self-evaluation and goals for the coming year.
- Meet face-to-face with the employee to discuss the performance evaluation and goals.
- Determine what is needed to help the employee grow in the position and make concrete plans to help the employee meet those goals.
- Review and recommend any changes to the position description.
- Summarize agreements and make needed recommendations about how the work plan can best be implemented.

Professional Development

Lifelong learning and education has been at the heart of the Presbyterian Church throughout its history. The session personnel committee is key to establishing a plan of professional development for each of the staff members of the church. The ministry of the church is enhanced as the personnel committee encourages and values the growth and development of the church's staff.

As a part of the work planning and annual review process, consider the following kinds of professional development:

Training -The development of particular skills through classes, seminars and conferences.

Career Development - An educational program that leads to a degree or the completion of a specialized program such as certification.

Continuing Education – Workshops or classes related to current or upcoming work that helps to develop the staff member.

In most instances, the presbytery will have minimum standards for continuing education for church professionals. However, consult with the presbytery Committee on Ministry or professional organizations in the Presbyterian Church (USA) for the guidelines and support they may be able to provide. The model found in appendix B suggests some policies for professional development.

Sabbaticals or extended study leaves are becoming increasingly important for church professionals. They are a preventative measure for burnout and provide a time to gain perspective on the ministry of the church. These are not extended vacation times, however. Determining specific educational objectives before the leave and written reports afterwards will focus the experience both for the staff member and the committee.

Written plans for professional development should be approved by the session. Approval is especially important in relation to sabbaticals or extended study leave.

Staff Rights and Safety

All staff members are entitled to a safe workplace environment and a right of privacy and confidentiality, freedom from abuse of power and freedom from harassment, including sexual harassment. The employing organization must ensure these rights are adhered to and that all employees follow policies in relation to these rights.

It is important to have a written policy on Sexual Misconduct and Harassment along with proper training for church staff and volunteers. This policy would include the process for reporting misconduct and a grievance procedure.

Safety in the workplace also requires compliance with workers' compensation laws and the Federal and State Occupational Safety and Health Acts (OSHA). This includes written workplace safety policies and procedures and safety training and discussions with staff on a periodic and regular basis.

Separation

Each employing organization should have policies and procedures relating to Termination and Separation. These would include resignation, dismissal for cause, dissolution of a pastoral relationship, reorganization, and retrenchment of program or other circumstances arising out of no fault of the employee.

The policies should state, depending on the type of termination, how much notice will be given, whether or not severance-pay, extension of benefits and/or career planning guidance is included. It is helpful to include an Exit Interview procedure as well.

APPENDIX A-

Sample Job Description of Session Personnel Committee

Purpose: To provide for an orderly, focused and considerate means for the session to build a healthy work environment.

Membership: Five persons: three from the session, one of whom shall be appointed chair by the session, and two members from the congregation. The pastor serves as an ex-officio member. All members are appointed by the session. The committee will be divided into classes which are determined by the session's normal rotation process. No one may serve more than two consecutive terms.

Meetings: The committee shall meet at least quarterly and on the call of the chairperson or pastor. The agenda for each meeting shall be set by the chairperson and the pastor jointly. No meeting will take place without the pastor present, unless the pastor is notified and informed of all agenda.

Relationships and Accountability: The committee is accountable to the session. It will present a written report to the session following each committee meeting.

Responsibilities:

Recommend position descriptions for all staff.

Review and recommend to session compensation packages for all staff.

Recommend to session and maintain personnel policies.

Encourage professional growth and development for all staff.

Recommend to the session ways to manage risk exposures, including proper sexual-misconduct trainings.

Implement a plan of equal employment opportunities, developed in consultation with the presbytery and approved by the session.

Provide for a review process to assist in work planning.

Conduct performance evaluation of Head of Staff; receive reports from Head of Staff on other performance evaluations.

Ensure that personnel files are maintained appropriately.

Act as a support group for the pastor and other members of the staff.

Confer with the pastor on any important issues of concern.

Retain an attorney to advise committee and head of staff on all of the above, as needed

Regularly assess adherence to HR philosophy/mission statement and the mission and ministry of the congregation.

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APPENDIX B – Sample HR Manual

These are recommended items to include in an HR Manual; they are not all-inclusive and will vary depending on size and nature of employer. An employer should seek legal expertise when drafting their own personnel policies and procedures.

Personnel Policies & Procedures of The _____ Presbyterian Church

These policies cover all staff except term/contract employees who are governed by provisions of their contract. _____ PC has the right to change or amend policies at its discretion.

I. Equal Employment Opportunity

The _____ Presbyterian Church prohibits discrimination against employees or applicants on the basis of race, color, creed, gender (including gender identity and gender expression) religion*, age, marital status, physical or mental ability, medical condition (including cancer and genetic characteristics) genetic information, national origin or ancestry, sexual orientation* or any other consideration protected by federal, state or local law.

** except in the case where it is a bona fide requirement of a position requiring a Ruling Elder, Certified Christian Educator, Deacon or Teaching Elder of the Presbyterian Church (U.S.A.). Exceptions will require the review and approval of the Session Personnel Committee.*

_____ will comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability. _____ will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee, unless undue hardship would result.

If an employee believes he/she has been subjected to any form of unlawful discrimination, he/she is to provide a verbal or written complaint to his/her supervisor or person handling HR responsibilities. _____ will undertake a thorough investigation and attempt to resolve the situation. If _____ determines that unlawful discrimination has occurred, appropriate action will be taken.

_____ will not retaliate against an employee for filing a complaint and will not knowingly permit retaliation by management or co-workers.

II. Process Of Employment

A written position description that accurately reflects the job functions will be developed by the Pastor Nominating Committee or the pastor and the session Personnel Committee depending on the position to be filled. It must be approved by the session. Position descriptions will be rewritten in consultation with the new staff member four to six months following employment. They must be approved by the session.

If the position is advertised, it shall state that the _____ Presbyterian Church is an Equal Employment Opportunity employer. The Equal Employment Opportunity policy of the church shall be followed in consideration of applicants for interviews and employment.

Care shall be taken during the interviews to see that the privacy of the individual is protected. All questions shall be job-related.

All hiring documents will be managed appropriately, including those legally-required (see Hiring Checklist for complete list).

If a background check is required for the position, written candidate/employee authorization must be given and the results made available to the candidate/employee.

III. Position Classifications

All positions are classified as exempt or non-exempt, based on Federal and State law. Exempt employees are those who work in an executive, administrative, supervisory, or professional position of a type excluded or exempted from overtime and other provisions of the Federal Fair Labor Standards Act (FLSA) and/or California law. Exempt employees are paid a salary, regardless of actual hours worked. Non-exempt employees qualify for overtime pay and other wage and hour provisions under FLSA and/or state law, and are paid for actual hours worked.

IV. At-Will and Introductory Period

_____ Church is an at-will employer and, as such, employment may be terminated at the will of either the employee or employer on notice to the other.

At the time a lay staff person is hired, there shall be an introductory period of sixty days, considered training and get-acquainted period, completion of which does not guarantee continued employment. During this time either _____ Church, through the immediate supervisor, or the employee may voluntarily terminate employment without cause, notice or further obligation of either party. _____ reserves the right to extend the introductory period, if necessary. At the satisfactory completion of the introductory period, lay staff members working at least 20 hours per week are eligible for all regular employee benefits.

_____ continues to maintain an at-will employment relationship during and following an Introductory Period.

V. Work Week

The work week for full-time non-exempt staff is 40 hours and ordinarily consists of five working days (Monday – Friday) of eight hours each, including a fifteen minute rest period each in the morning and the afternoon, and an unpaid meal break of up to one hour per day. For time worked over 40 hours in a week or 8 hours in a day, pay is at the rate of one and one half times the regular hourly rate. Exempt employees are not paid overtime wages for hours worked in excess of 40 hours per week.

The work week for part-time non-exempt staff will vary depending on the position, but will be determined at time of hire.

Required attendance at meetings for full-time non-exempt staff outside of the working hours, but in addition to their regular work day, shall be considered overtime and shall be compensated as indicated.

VI. Time Tracking and Pay Periods

It is necessary to maintain and submit accurate and complete records of time worked, as required by the Fair Labor Standards Act (FLSA). Therefore, all non-exempt employees shall keep a daily record of their time and turn the Timesheet in to their supervisor at the end of the semi-monthly pay period.

All staff wages are paid semi-monthly, based on two pay periods, which are the first through the fifteenth day and the sixteenth through the last day of each month. Payroll checks are disbursed on the last working day of each pay period. If the scheduled payday falls on a week-end or church-observed holiday, employees will be paid on the preceding work day. All required deductions, such as federal, state and local taxes, and all voluntary deductions authorized in writing will be withheld automatically from an employee's paycheck.

VII. Dress Code

As a religious organization, it is expected that employees will project a professional image. Employees are to wear semi-professional attire and maintain good personal hygiene. The Synod is confident that each employee will use his/her best judgment in following this policy; however, management reserves the right to determine appropriateness.

VIII. Annual Compensation Review

The session Personnel Committee is responsible for recommending to the session all salary increases, in a time-frame consistent with church budget-preparations and employee performance reviews. Salary levels shall be maintained so that they are consistent internally, responsive to changes in the cost of living, and in keeping with the church's compensation standards. Salary scales for non-exempt staff shall be in keeping with the provisions of State and Federal laws covering minimum wages and competitive within the local market for similar positions.

Compensation for all ordained staff members is the responsibility of the congregation, with approval of the presbytery.

IX. Annual Performance Review

Every employee shall have an annual performance review with the participation of the employee, his/her supervisor and, on occasion, a member of the session Personnel Committee. In addition to an evaluation of the employee's performance and goals set for the year, the review will also include an employee self-evaluation and a review of and update to the employee's job description.

X. Benefits

The following benefits are currently provided to all staff working at least 20 hours per week, unless indicated otherwise. _____ Church has the right to revise benefits and provide notice to staff accordingly:

1. Social Security

All non-minister employees are covered by FICA (Social Security and Medicare); their share of the tax is withheld from their wages. Ordained staff are considered self-employed for W-2 purposes and are responsible for FICA payments.

2. Pension

Benefit-eligible staff is enrolled in the Presbyterian Pension and Benefits Plan.

3. Health Insurance

Medical and Dental insurance for employees is provided to benefit-eligible non-ordained staff; employee may add dependents at his/her own expense through payroll deduction. Called and ordained staff are entitled to family medical insurance through the Board of Pensions of PC (USA).

4. Vacation

Benefit-eligible exempt employees are entitled to one full month (22 working days) vacation per year. Benefit-eligible non-exempt employees are entitled to an annual paid vacation computed on January 1st of each year with ten (10) days granted for one year of credited service and with one day added for each additional year of service up to twenty-two (22) days. All earned, unused, vacation will be paid out to employee upon termination of employment.

5. Holidays

The following paid holidays will be observed: New Year's Day, Martin Luther King, Jr.'s Birthday, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day and the Friday following, Christmas Eve, Christmas Day. Any changes will be recommended to the session by the session Personnel Committee. In addition, each employee may elect to observe one "floating" holiday of his/her choice, with two weeks advance notice.

6. Workers' Compensation Insurance

All employees shall be covered by the Workers' Compensation Insurance to protect an employee if he/she is injured on the job.

7. Unemployment Insurance (religious entities in California are not required to participate in FUTA/SUI) (If Church does choose to participate: "All employees shall be covered by Federal and State Unemployment Insurance.")

8. Sick Leave

Benefit-eligible employees will receive 10 working days of sick leave each calendar year, cumulative up to 120 days, to be used in case of illness. Sick leave entitlement during the first year of employment will be prorated according to length of employment. At the time of termination of employment (either voluntary or involuntary) an employee shall have no claim for pay in lieu of unused sick leave.

Note: some employers offer Personal Time Off (PTO) instead of vacation and sick leave.

9. Leaves of Absence

Leaves of Absence (LOAs) can be complex. Below are some basic policies regarding various types of LOAs. It is advised to seek counsel on putting together a comprehensive LOA policy.

Employees can request leaves of absence for medical (including pregnancy/childbirth related), military, or personal reasons. All requests should be made to _____, with as much advance notice as possible. All leave of absence requests will be considered at _____ Church's discretion on a case-by-case basis, and will be handled in accordance with applicable legal requirements. (Note: Depending on the size of the organization there may be other leaves to include here).

An employee is eligible for a LOA after at least twelve (12) months of service (immediate eligibility for pregnancy-related disability and others, if legally-mandated).

Short-term Leaves of Absence With Pay

- For regular training period in the U.S. Armed Forces (up to two weeks annually).
- Jury duty (up to two weeks annually).
- Personal and family emergencies or other personal business that cannot be cared for outside working hours (up to three days annually).
- Bereavement leave (up to three days annually); time lost to attend a funeral locally may be counted as personal or family emergency leave to be arranged in consultation with an employee's supervisor.
- Time off for voting (up to two-hours) where election hours and work schedules cause a hardship on employees.

Medically Certified Disability Leave (short term or long term)

Employees who are, according to certification by a licensed physician, temporarily disabled and who are not covered by a state disability plan shall, beginning the sixth day of disability, receive half- salary and full benefits for a period of such disability not to exceed 90 days, at which time if disability continues, application may be made for disability benefits from the Board of Pensions for members of the Pension Plan or the church's Long-Term Disability Plan, if applicable. This policy shall apply to all medically certified disabilities, including pregnancy-related disability.

Parental Leave

Regular full-time and part-time employees are eligible for parental leave. Eligible employees may elect up to 6 weeks of paid leave for birth, adoption, or guardianship of a child. Parental leave can run concurrent with a medically certified disability. A 30 day notice must be given in writing for approval. The leave must be taken directly preceding or within twelve months of the birth or placement of a child. If spouses are employed by the same employer and wish to use this benefit, their aggregate leave is limited to three months. Benefit coverage continues during parental leave.

Personal Leave

Under special circumstances, _____ Church may grant an unpaid personal leave of absence for up to 12 weeks.

Other Legally Mandated Time Off

_____ will comply with all other laws requiring employee time away from work. This includes time off as appropriate for jury duty, voting in a statewide election, serving as a volunteer firefighter, organ donation, for leave necessary due to a domestic violence or sexual assault situation, and for time off for victims (or family members of victims) of violent or serious felonies to attend related judicial proceedings. (Note: This will vary based on organization size and what is required.)

Every effort will be made to return the employee to the same or a similar position at the conclusion of the leave of absence. However, the church's need to fill a position may override its ability to hold a position open until an employee returns from his/her LOA. Failure to return from a LOA upon the expiration of the leave will be considered a voluntary resignation.

10. Study Leaves

Employees are entitled to study leave of one week per year (two weeks for ordained staff). This leave is to be discussed in advance and approved by the session Personnel Committee.

11. Sabbaticals

Exempt employees are entitled to a sabbatical leave of up to six weeks every seven years for a session approved study program. Study leave will not be given on a sabbatical year.

Part-time employees (those working less than 20 hours per week) are eligible for the following:

1. Holiday pay, if the holiday falls on one of the regularly scheduled working days for that part-time employee.
2. Jury duty pay (up to two weeks leave annually).
3. Workers' Compensation Insurance.
4. Social Security participation.
5. Severance allowance in proportion to hours worked each week.

Temporary Employees

Those employed for a short period, usually less than three months, are covered under Workers Compensation Insurance but are not paid for holidays, sick leave, or other leaves, and do not earn vacation leave for their temporary employment. They are not eligible for the pension plans or other health benefits entitlements. If they work more than the normal weekly work schedule, they will be paid at the regular rate for hours up to 40 per week, and time and a half for above 40 hours in a week or 8 hours in a day, in the case of non-exempt employees. If a temporary employee joins the regular staff, his/her temporary employment is not considered as credited service in computing entitlements to vacation and other benefits.

XI. Sexual Misconduct and Harassment

The most common form of workplace harassment is sexual harassment, but harassment can also be based on race, gender, age, marital status, employment status, abuse of power or any other unlawful basis.

It is the policy of (this church) to maintain a workplace free from any form of harassment or sexual misconduct, by any employee, member or visitor of the congregation. This policy is based on the Sexual Misconduct Policy adopted by the General Assembly (1991) and as that policy may be amended. (You will need to establish a set of procedures to implement this—contact your presbytery Committee on Ministry for assistance).

The scope of this policy is not limited to the church building. It includes all contacts in carrying out this congregation's responsibilities and relationships with employees, volunteers, and others.

Any form of sexual misconduct or harassment is unacceptable behavior. All allegations will be taken seriously, investigated and appropriate corrective or disciplinary action taken as warranted.

Employees are required to report harassment that they experience or know of. When there is a complaint of sexual misconduct, discrimination, harassment and/or the abuse of power, the complainant is to notify his/her immediate supervisor or other person in authority or a member of the personnel committee and the civil authorities if required by law. An investigation will be conducted, and further action will be taken in accordance with the rules of the Church and the legal requirements of the state of jurisdiction. _____ Church takes all complaints seriously and will investigate each one. _____ Church has a 'no-retaliation' policy (see below).

The Supervisor shall immediately notify the Chair of the Personnel Committee. In the event the complaint is against the Supervisor, the person notified shall immediately notify the Chair of the Synod Mission Personnel Committee.

An employee also has the right to notify the appropriate state agency that resolves complaints of unlawful discrimination, including sexual harassment. To contact the agency, consult the local telephone directory under State Government Offices. Following is the last address for the California agency.

California:

Department of Fair Employment and Housing (DFEH)
2014 T Street, Suite 210
Sacramento CA 95814-6824

XII. Retaliation

_____ Church policy and state laws forbid retaliation against any employee who opposes unlawful discrimination, files a complaint, testifies or assists or participates in any manner in an investigation, proceeding or hearing conducted by _____ Church or the Equal Employment Opportunity Commission or comparable state agency. Retaliation includes refusal to hire/rehire, increased scrutiny by supervisor, denial of promotion, undeserved, negative reviews, written disciplinary action, demotion, ostracism and termination.

XIII. Grievances

Any problems arising from employment or conditions of employment are to be directed to the person's immediate supervisor, and if not resolved, to the pastor as head of staff. In those cases where the solution to a problem has not been worked out in discussion with the pastor, the employee may appeal to the session Personnel Committee. If the matter is still not resolved, the employee may appeal to the session in writing.

If the above steps fail to provide an acceptable remedy, the employee may file a written complaint with the appropriate presbytery committee. The presbytery committee becomes the mediator between the pastor, session and the employee, and will work out a solution acceptable to all three parties involved.

All original documentation shall be filed with the Church personnel records and a copy placed with the presbytery. Decisions will be final and binding upon all persons concerned in the grievance, subject to the *Book of Order*.

XIII. Termination

_____ Church is an at-will employer and, as such, employment may be terminated at the will of either the employee or employer on notice to the other.

Dismissal for cause may take place by written notice from the session giving reason for termination. Notice must be given or pay in lieu of notice of two weeks. No severance allowance will be paid. Reasons may include: unsatisfactory performance, refusal to do work within his/her position description, repeated unexcused absences, repeated tardiness, incompetence, or illegal, dishonest or unethical conduct.

For dissolution of a pastoral relationship, see the Form of Government.

Because of reorganization, retrenchment of program or other circumstances arising out of no fault of the employee, involuntary separation is at the discretion of the session upon recommendation of the session Personnel Committee. A severance allowance should be granted in relation to length of service.

Upon termination, for any reason, employees will receive the cash equivalent of their earned but unused vacation days.

Other Policies

There are other important policies and procedures to consider and address within a Church Manual. They include, but are not limited, to:

- Conflict of Interest
- Confidentiality
- Alcohol and Drug Use
- Smoking Policy
- Workplace Violence
- Use of Electronic Media
- Social Media in the Workplace

APPENDIX C

_____ CHURCH

RECEIPT AND ACKNOWLEDGMENT

I understand that all employees must execute this receipt and acknowledgment.

I have been given and have read the policies and procedures contained in the _____ Church Personnel Policies and Procedures Manual, dated _____ (referred to as "Manual").

I agree to follow the policies and procedures as stated in this Manual. I understand that _____ Church has the right to change or amend policies at its discretion. I further understand that none of the policies and procedures constitutes a contract or guaranty of continued employment, nor does it confer any contractual rights upon me. I further understand that, unless I am Clergy, my employment is at-will and can be terminated at any time with or without notice.

I agree that this Manual is the property of _____ Church and shall be available to all employees at all times, and be returned to _____ Church upon termination of employment.

I have carefully read this Receipt and Acknowledgment.

Employee Name: _____

Signature: _____

Position Title: _____

Date Signed: _____

Please return the extra, signed receipt and acknowledgement form to your Supervisor.

APPENDIX D

Sample Hiring Checklist

	Date Given to EE	Date Rec'd	Date Filed/Sent
Employee Name _____			Date of Hire _____
<input type="checkbox"/> Employment Application	_____	_____	N/A
<input type="checkbox"/> Background Checking Forms*	_____	_____	_____
<input type="checkbox"/> Offer Letter.....	_____	N/A	N/A
<input type="checkbox"/> W-4 Form: Employee Withholding	_____	_____	_____
<input type="checkbox"/> I-9 Form: Employment Eligibility Verification	_____	_____	_____
<input type="checkbox"/> Workers' Compensation Information	_____	N/A	N/A
<input type="checkbox"/> Personal Physician/Chiropractor Predesignation Form	_____	_____	_____
<input type="checkbox"/> Notice of COBRA Continuation Coverage Rights.....	_____	N/A	N/A
<input type="checkbox"/> Report of New Employee(s): Form DE-34	N/A	N/A	_____
<input type="checkbox"/> Wage and Employment Notice to Employees	_____	N/A	N/A
<input type="checkbox"/> Sexual Harassment Information Sheet	_____	N/A	N/A
<input type="checkbox"/> Disability Insurance Pamphlet (DE 2525)**	_____	N/A	N/A
<input type="checkbox"/> Paid Family Leave Pamphlet (DE 2511)**	_____	N/A	N/A
<input type="checkbox"/> Work Permit (if employee is a minor).....	_____	_____	_____
<input type="checkbox"/> Initial Safety Training	_____	_____	_____
<input type="checkbox"/> Employee Orientation	_____	_____	_____
<input type="checkbox"/> Emergency Information Sheet	_____	_____	_____
<input type="checkbox"/> Employee Handbook w/ Receipt Pages	_____	N/A	N/A
<input type="checkbox"/> Employee Handbook Receipt.....	N/A	_____	_____
<input type="checkbox"/> Conflict of Interest Receipt	N/A	_____	_____
<input type="checkbox"/> Health Insurance and Benefits/ BOP Info & Forms.....	_____	_____	_____
<input type="checkbox"/> Report of Independent Contractor Status (DE542)	_____	_____	_____
<input type="checkbox"/> Appropriate Exempt Analysis Worksheet	_____	_____	_____
<input type="checkbox"/> Employment Interview Checklist	_____	_____	_____

* Required if you do a credit or background check.

** These are required if employer participates in California SDI

Note: Forms in bold are legally required.

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APPENDIX E

Position Description Samples

Title: Pastor (Teaching Elder)

Status: Salaried, Exempt

Purpose: (NOTE: The following examples describe a variety of situations.)

Example 1

To provide spiritual leadership, pastoral care, administrative oversight and organizational direction to a congregation of 1,500 members with a broad program of worship, music, preaching, teaching and fellowship.

Example 2

To provide a balanced ministry of preaching, teaching, pastoral care, and organizational leadership to a congregation of 150 members, and to enable the church to grow to its full potential in membership and in spiritual vitality.

Example 3

To provide a total ministry in the name of the Christian church to an overcrowded 10-block depressed neighborhood in the heart of a large city where crime rates are high and human needs are great.

Accountability: Accountable to the presbytery and to the session through the Personnel Committee.

Responsibilities: (NOTE: Examples describe a variety of situations; yours should describe your particular situation.)

Provide an outstanding biblically based preaching and teaching ministry that will attract people from a wide geographic area.

Preach, lead in worship, and provide a teaching ministry that will lead to the spiritual growth of the membership and awaken them to an active outreach to their neighbors in evangelism.

Lead and inspire the session and congregation in the development and effective operation of a wide range of program activities—recruiting, motivating and training youth and adult leadership.

Provide active leadership to the session, the congregation and its organizations in development programs that will enable the church to grow in mission in keeping with its potential in a growing community.

Administer the church's program by leading, directing, and supervising a full-time professional staff of six, including an associate minister, a director of Christian education, a choir director, an organist, an administrative assistant (secretary), a business administrator, a weekday schoolteacher, and any additional support staff.

Maintain the program of activities of the congregation, including the church school, women's association, the choir and the Mariners Club.

Provide pastoral services for those in crisis situations.

Develop an active youth program that will bring young people into the church.

Coordinate a multifaceted program of community service and community organization activities, and supervise a professional staff of two and a large part-time and volunteer staff in the administration of programs, which include a well-baby clinic, a youth gang ministry, Head Start classes, adult education, employment services, and a drug rehabilitation ministry.

Work with community leaders in galvanizing community action to counteract exploitation of the community by unscrupulous entrepreneurs, absentee landlords and others.

Work with the session in developing programs for the congregation, for residents of the neighborhood, and for Christians in the whole metropolitan area.

Relationships: Relates to the session and various committees as the moderator of session; relates to the staff as head of staff; relates to congregation as pastor; relates to the presbytery as a member.

Evaluation: Performance reviews will be conducted annually by the session Personnel Committee and the pastor as head of staff. The session Personnel Committee will annually review the adequacy of compensation.

SKILLS, KNOWLEDGE AND ABILITIES NEEDED:

Must possess and demonstrate the following:

A faith in Jesus Christ which forms the foundation for his/her entire life.

An ability to communicate his/her faith in a winsome and gracious manner and practice a deep and authentic prayer and devotional life.

A knowledge of strategies for evangelism and outreach.

Capable administration skills to assist this person in managing the Church and staff.

Ability to understand and administer finances.

Ability to manage and evaluate the performance of exempt and non-exempt staff

Conflict Management/Mediation Skills

Knowledge and Experience:

Teaching Elder in the Presbyterian Church (USA).

Demonstrated ability in and with PC (USA) polity.

Has familiarity with the resources of the PC (USA).

Is knowledgeable with current technology and is willing to use this technology to facilitate communication and mission.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly requested to sit for prolonged periods of time. Close vision and manual dexterity are required to access data utilizing a personal computer and other office equipment. Talking and hearing is necessary when utilizing the phone for customer service and for presentations during meetings. Lifting up to 15 lbs. may be needed lifting file boxes and supplies.

Effective Date

(NOTE: This is a suggested guide. It should be adapted to the needs of your congregation.)

Position Description (Sample)

Title: Church Business Administrator

Status: Salaried, Exempt (may be non-exempt, depending on responsibilities)

Purpose: To coordinate the business affairs of the church, including the responsibilities of recruiting, training, and supervising of necessary personnel. The appropriate committee of the session, if any, should be consulted in each case, but the coordinating responsibility is the administrator's.

Accountability: Accountable to the pastor as head of staff.

Responsibilities: Oversee and coordinate the church office operations, computer services, general administrative work, and purchasing of equipment and supplies.

Supervise the church bookkeeping and accounting procedures including payrolls, accounts payable, collection and deposit of receipts, investments, pledge records, special gifts, stock conversions, tax listings, systems and procedures, financial statements, and statistics.

Oversee the preparation of the church budgets, including accumulating requests and preparing working documents for meetings of the Budget Committee, and meeting with the Budget and Finance Committee.

Supervise the maintenance of the building and grounds, assuring that repairs and maintenance, janitorial work, building openings and closings are performed.

Supervise dining room operations and special functions, overseeing scheduling, purchasing, inventory records, reservations of facilities and collection of fees.

Coordinate public relations efforts, such as radio broadcasts and news releases, and serve as a liaison between the church and the media.

Maintain a stewardship program and provide supplies, record-keeping, progress reports, and solicitation assistance, work with special groups for the purpose of interpretation of mission and stewardship, and other miscellaneous functions as may be required.

Relationships: The administrator reports to and works with the pastor as head of staff. The administrator works directly with various individuals such as the chairperson of the Board of Trustees, Joint Budget and Finance Committee, Personnel Committee, Property Committee, treasurer, financial secretary, and pastor to obtain information and such counsel as may be desired by the administrator.

Evaluation: Performance reviews will be conducted annually by the pastor as head of staff and the session Personnel Committee. The session Personnel Committee will annually review the adequacy of compensation.

SKILLS, KNOWLEDGE AND ABILITIES NEEDED

Must possess demonstrated effective skills in the following areas:

- Accounting and bookkeeping methods
- Accounting software
- 10-key calculator by touch
- Mathematical skills (including discounts, interest, percentages, etc.)

- Computerized spreadsheet software
- Computer network environment
- Communication (oral and written)
- Interpersonal relations
- Commitment to teamwork
- Customer service

Knowledge and Abilities

- A Bachelor's Degree in Accounting or Finance plus two years full-charge bookkeeping experience, or a five year combination of education and accounting experience
- Able to work independently and under pressure
- Professional appearance, ethical conduct, and ability to maintain confidentiality

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly requested to sit for prolonged periods of time. Close vision and manual dexterity are required to access data utilizing a personal computer and other office equipment. Talking and hearing is necessary when utilizing the phone for customer service and for presentations during meetings. Lifting up to 15 lbs. may be needed lifting file boxes and supplies.

Effective Date

NOTE: This is a suggested guide. It should be adapted to the needs of your congregation.

Position Description (Sample)

Title: Administrative Assistant or Church Secretary

Status: Hourly, Non-Exempt

Purpose: To provide administrative and secretarial services to the pastor and other church staff.

Accountability: Accountable to the pastor as head of staff or church business administrator.

Responsibilities: Perform the function of administrative assistant (or secretary) to the pastor and other staff including all typing, filing, routine correspondence and maintenance of calendar.

Be responsible for production of materials through computers, folding machine, duplicating machine and postage machine, and oversee usage of machines by others. Maintain permanent church records. Perform administrative work for church committees and organizations as directed by the pastor, as the head of staff. Be responsible for the ordering of office supplies and equipment. Set deadlines for receipt of information and prepare documents for mailing, including church bulletins, announcements, letters to congregations, and newsletters. Supervise volunteers as required.

Relationships: The administrative assistant (secretary) is accountable to the pastor as head of staff and, through the pastor, to other staff in the performance of his/her responsibilities.

Evaluation: Performance reviews will be conducted annually by the pastor as head of staff and the session Personnel Committee. The session Personnel Committee will annually review the adequacy of compensation.

SKILLS, KNOWLEDGE AND ABILITIES NEEDED

Must possess demonstrated effective skills in the following areas:

- Ability to prioritize
- Leadership
- Communication (oral and written)
- Interpersonal relations
- Commitment to team work
- Customer service
- Time-management
- Initiative and creativity
- Computerized word processing and spreadsheet software
- Computer network environment
- Mathematical skills (including interest, percentages, etc.)

Knowledge and Abilities

- An Associate's degree and one year's administrative experience, or a three year combination of education and administrative experience
- Able to work independently and under pressure
- Professional appearance, ethical conduct and ability to maintain confidentiality

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly requested to sit for prolonged periods of time. Close vision and manual dexterity are required to access data utilizing a personal computer and other office equipment. Talking and hearing is necessary when utilizing the phone for customer service and for presentations during meetings. Lifting up to 15 lbs. may be needed lifting file boxes and supplies.

Effective Date

NOTE: This is a suggested guide. It should be adapted to the needs of your congregation.

Position Description (Sample)

Title: Director of Music

Status: Salaried, Non-Exempt

Purpose: To coordinate and plan the whole music program of the congregation and to supervise the church organist.

Accountability: Accountable to the pastor as head of staff.

Responsibilities: Plan the music program and make appropriate recommendations. Coordinate/Direct all the choirs. Respond to other music needs that come through other staff persons. Coordinate training of young people and children in the music program. Provide soloists as needed.

Relationships: Relates to the pastor as head of staff, other staff persons, and the Music Committee, and supervises the church organist.

Evaluation: Performance reviews will be conducted annually by the pastor as head of staff and the session Personnel Committee. The session Personnel Committee will annually review the adequacy of compensation.

Add sections for 'Skills, Knowledge & Experience Needed' and 'Physical Requirements' and Effective Date

NOTE: This is a suggested guide. It should be adapted to the needs of your congregation.

Position Description (Sample)

Title: Church Sexton (Custodian)

Status: Hourly, Non-Exempt

Purpose: To provide the essential maintenance services for the church building and grounds, and serve as security/watchperson of premises.

Accountability: Accountable to the pastor as head of staff.

Responsibilities: Keep buildings clean and well maintained on the inside and outside. Maintain all grounds, performing such functions as cutting grass, shoveling snow, and caring for flower beds. Maintain security of premises, and serve as watchperson to be sure building is in safe condition and locked when premises are vacant. Perform minor repairs to masonry, electrical system, plumbing, and immediate temporary repairs in an emergency. Keep the Property Committee (or Trustees) informed of major repairs needed.

Relationships: Accountable to the pastor as head of staff and the Property Committee (or Trustees) in the performance of his/her responsibilities.

Evaluation: Performance reviews will be conducted annually by the pastor as head of staff and the session Personnel Committee. The session Personnel Committee will annually review the adequacy of compensation.

Add sections for 'Skills, Knowledge & Experience Needed' and 'Physical Requirements' and Effective Date

NOTE: This is a suggested guide. It should be adapted to the needs of your congregation.

SYNOD OF THE PACIFIC, PC (U.S.A.)

TITLE

TITLE: [Write title Name]

STATUS: [Hourly, non-exempt or Salaried, non-exempt]

PURPOSE: To serve as _____ for the Synod.

ACCOUNTABILITY: *(Sample)* The _____ is employed by the Synod and is accountable to the Synod Executive through the Director of Business Services.

REPORTS TO: Director of Business Services

GENERAL GOAL OF THE POSITION: To provide _____, all in accordance with established Synod policies and procedures.

JOB RESPONSIBILITIES, TASKS AND PERFORMANCE RESULTS EXPECTED:

I. Function: [Percentage of time spent: ____%]

A. Tasks

- 1.
- 2.
- 3.

B. Performance meets satisfactory expectations when:

- 1.
- 2.
- 3.

II. Function: [Percentage of time spent: ____%]

A. Tasks:

- 1.
- 2.
- 3.

C. Performance meets satisfactory expectations when:

- 1.
- 2.
- 3.

RELATIONSHIPS: *(sample)* The _____ is a member of the appointed staff and works directly with central office staff and financial staff in regional offices.

EVALUATION: There is an annual review and evaluation of performance in accordance with the personnel policies of the Synod.

EMPLOYMENT TERMS: This is a (exempt or non-exempt) ____ time _____ (salaried or hourly) position at _____ hours per week. The position is subject to the personnel policies of the Synod of the Pacific. The employee must maintain confidentiality at all times. All other terms and conditions are described in the Personnel Policies & Procedures Manual or current office procedure and practice. The Synod of the Pacific is an Equal Opportunity Employer.

SKILLS, KNOWLEDGE AND ABILITIES NEEDED (*sample*)

I. Must possess demonstrated effective skills in the following areas: (*sample*)

- Accounting and bookkeeping methods
- Accounting software
- 10-key calculator by touch
- Computerized spreadsheet software (Excel)
- Communication (oral and written)
- Interpersonal relations
- Commitment to teamwork
- Customer service

II. Knowledge and Abilities

- An Associate Degree in Accounting plus one year bookkeeping experience, or a three-year combination of education and bookkeeping experience
- Able to work independently and under pressure
- Professional appearance, ethical conduct, and ability to maintain confidentiality

PHYSICAL REQUIREMENTS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly requested to sit for prolonged periods of time. Close vision and manual dexterity are required to access data utilizing a personal computer and other office equipment. Talking and hearing is necessary when utilizing the phone for customer service and for presentations during meetings. Lifting up to 15 lbs. may be needed lifting file boxes and supplies.

Effective Date

APPENDIX F
Sample Performance Review Forms

Performance Review/Work Plan Sample

Date

(Sample)

Name _____ Date _____

Position _____

Based on Goals and Priorities Established by Session
(establish expected dates of completion for each goal)

Work plan for evangelism:

Propose to the Evangelism Committee a method for implementing its program of Covenant Renewal designed last year.

Recommend to the Evangelism Committee some options for meeting its goal of increasing the church's membership 20 percent.

Work plan for teaching responsibilities:

Provide leadership training for youth and adult leaders in order to improve the planning and implementation of programs for youth and adults.

Work plan for spiritual development of members:

Develop a Spiritual Life Committee responsible for planning and implementing a program of spiritual development.

Work plan for stewardship and commitment program:

Recommend some alternatives to the Stewardship Committee for achieving its goal of a year-round program and increasing pledges by 25 percent.

Work plan for administrative leadership:

Hold a series of staff meetings in which the concept of shared ministry is discussed and in which recommendations for implementation are transmitted to the session for its discussion.

Signed _____

Approved _____

(supervisor or chair of session Personnel Committee)

Performance Review Form

Name _____ Date _____
Position _____

Work plan for _____ (e.g. Evangelism)
If accomplished list results, or if not accomplished, list reasons.

2. Work plan for _____
(Repeat the list of accomplishments or reasons for lack of accomplishments for each of the specific work plans.)

What actions need to be taken? What is the time frame to do this?

Signed _____
(employee)

Signed _____
(supervisor or chair of Personnel Committee)

Feedback on Work Performance
(Sample)

Attached is this year's work plan for _____ (employee's name). You worked with him/her on some of these tasks. Please complete the following and return it to _____ (name) by _____ (date). Thank you.

What was most helpful?

What could have been different?

Do you have any other comments regarding the individual's work performance?

Signed _____ Date _____
Position/relationship to employee _____

SYNOD OF THE PACIFIC (PCUSA)

CONFIDENTIAL ELECTED STAFF PERFORMANCE EVALUATION

This section is to be completed by the Presbytery Personnel Committee and returned to the Synod Executive.

NAME: _____ REVIEW DATE: _____

JOB TITLE: _____

EMPLOYMENT DATE: _____ TIME IN POSITION: _____

EVALUATION PERIOD FROM: _____ TO: _____

RATING SCALE:

E = Exceeds Expectations – Performance far exceeds expectations

S = Satisfactory – Performance meets expectations

NI = Needs Improvement - Performance falls short of expectations

N/A = Not Applicable to the employee’s current position

It is important to remember the purpose of an evaluation is to recognize successful job performance, and to provide assistance for improvement where needed.

Instruction: Using the rating scale above and descriptive observations, the evaluator is to note the assessment of the performance for this staff member relative to the functions/tasks, from job description, listed below.

SECTION I: JOB PERFORMANCE RESULTS

List the primary Job Functions/Tasks from current Job Description

Job Function/Tasks	Document performance results of each overall Function for which the Elected staff person is responsible.
I.	Rating:
<u>Rationale:</u>	

Document performance results of each overall Function for which the Elected staff person is responsible.

Job Function/Tasks

II.

Rating:

Rationale:

III.

Rating:

Rationale:

SYNOD OF THE PACIFIC (PCUSA)

SECTION II: SKILLS, INTERPERSONAL & SUPERVISORY PERFORMANCE APPRAISAL

Write the appropriate performance rating for the following areas. Use the blank areas for comments.

Staff Name: _____ **Evaluator Name:** _____

Knowledge and Skills	Rating:	
<p>Demonstrates knowledge and skills essential to the effective performance of the position and responsibilities.</p> <p>Keeps abreast of developments in job field and related fields.</p> <p>Masters office technology required to produce efficient services.</p>		
Communication	Rating:	
<p>Listens effectively and responds clearly and directly.</p> <p>Prepares clear, concise reports, correspondence and records.</p> <p>Responds to requests in a timely manner.</p>		
Interaction with others	Rating:	
<p>Works well with public.</p> <p>Works effectively w/associates/committees to achieve results.</p> <p>Responds positively to situations requiring courtesy and tact.</p> <p>Elicits and considers others' ideas and suggestions.</p> <p>Handles conflict constructively.</p>		
Quality/Quantity of Work	Rating:	
<p>Prioritizes tasks and effectively manages schedules.</p> <p>Shows a consistently low level of errors.</p> <p>Completes work within acceptable time frame, or delegates work appropriately to meet deadlines.</p>		

Planning and Organizing	Rating:	
<p>Designs realistic short and long-term plans.</p> <p>Establishes efficient work processes and procedures.</p> <p>Establishes appropriate procedures to monitor work progress, and identifies deviations in progress.</p> <p>Plans/organizes cross training.</p>		
Problem Solving/Decision Making	Rating:	
<p>Demonstrates ability to clearly isolate and define problem areas.</p> <p>Proposes and evaluates effective alternative solutions.</p> <p>Makes timely decisions once all pertinent facts are analyzed.</p>		
Delegation and Supervisory Skills	Rating:	
<p>Clearly defines responsibilities/limits with staff.</p> <p>Makes effective assignments based on staff skills & knowledge.</p> <p>Motivates staff to think and work independently.</p> <p>Counsels staff in both positive and negative circumstances.</p> <p>Provides opportunities to staff to develop knowledge and skills</p>		
Leadership	Rating:	
<p>Communicates Synod mission to staff.</p> <p>Shares information, involves staff, and gains commitment to goals.</p> <p>Establishes an open/trusting work environment in which employees feel involved, and are free to discuss opinions and ideas.</p> <p>Demonstrates knowledge of workplace policies, procedures, ethics, and diversity.</p>		

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SECTION III: SUMMARY OBSERVATIONS, INPUT & SIGN OFF

Staff Name: _____ Review Date: _____

NOTE: This set of questions/input from others would likely only be used for a Teaching Elder position. For an Administrative position, you may choose to seek input from others, but #3 (ways God is seen through employee) would likely not be used.

A. Summary of observations and input from others (committees, associates, staff):

Responses are confidential and are summarized here for purposes of this evaluation. Participating reviewers need to refer to the employee's job/position description to identify relevant responsibilities and expectations. This section is to be completed by the evaluating committee.

1. Employee's strengths

 2. Opportunities for growth for employee

 3. Ways God is seen at work through this employee's life and work

 4. Things appreciated most about this employee

 5. Other comments

 6. Were last year's goals successfully attained?

 7. Goals and Objectives for the coming year
-

B. Review of job/position description completed with employee. Is job description still accurate? Has the job changed? Suggested job description changes will be reviewed by the Synod Executive after the evaluation process is complete.

Supervisor's Initials _____

Employee's Initials _____

C. Employee Comments/Responses (if any):

Evaluating Committee Chair Signature: _____ **Date:** _____

Employee Signature: _____ **Date:** _____

Synod Executive signature: _____ **Date:** _____

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NAME: _____ REVIEW DATE: _____

APPRAISAL PERIOD FROM: _____ TO: _____

SECTION IV: SELF- EVALUATION OF JOB PERFORMANCE

This page is to be completed only by the person being reviewed. This stays with the evaluating committee.

1. What areas of your responsibility do you find particularly enjoyable?

...particularly frustrating?

2. To what extent were last year's Performance Objectives met?

3. What factors contributed to your ability to meet or not meet these objectives?

4. What are your stated Goals and Objectives for next year?

(This form might only be used for specific positions)

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SECTION V: INPUT FROM OTHERS

(Committees, Associates, Staff)

STAFF NAME: _____ **EVALUATOR:** _____

You have been selected to provide input relative to the performance evaluation of the staff member noted above. Your responses to the five questions below will provide added insight to the overall evaluation process. All responses are confidential, and will be summarized for the staff person as part of their performance review. Use the back side if more space is needed. Your assistance in this process is greatly appreciated. This form will stay with the personnel review committee.

When completed, please return to _____

1. In what capacity have you worked with the staff person being evaluated?
2. What do you see as this employee's strengths?
3. Where do you see opportunities for growth for this employee?
4. What are the ways you see God at work through this employee's life and work?
5. What are some of the things you appreciate most about this employee?
6. Other comments would you make that might be helpful: