



# Personnel Handbook

Vestry Approved January 2015

**Christ Church**  
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## **Welcome to Christ Church!**

Christ Church is an Episcopal community of faith seeking to nurture and grow Christian disciples to serve God in the world. We are grateful for the gifts and talents you bring to this community. We are committed to supporting you in achieving your highest level of work. We strive to create an atmosphere of mutual care and accountability among our church staff.

This document communicates personnel policies and expectations for all employees of Christ Church. It is not an employment contract.

Clerical employees are also subject to the Canons of the Episcopal Church and the Diocese of Milwaukee. As well, this entire manual is subject to the Canons of the Episcopal Church and of the Diocese of Milwaukee. Should any discrepancies arise, the Canons will take precedence.

Should Christ Church be without a Rector, replace "Rector" with "Senior Warden" throughout.

This handbook was developed by the Christ Church Personnel Committee, in consultation with the Rector. It is to be reviewed, updated, and re-published annually by the employees, the Rector, and the Vestry, as part of the assessment cycle. It is only in effect the year after it was last reviewed.

It was approved by the Christ Church Vestry on January 20, 2015.

# **SECTION I: YOUR EMPLOYMENT**

## **Employment Classifications**

The Church classifies lay and clerical employment:

1. Full-time employees work a minimum of 40 hours per week. They are eligible for all employee benefits.
2. Part-time employees work less than 35 hours per week. They are not eligible for employee benefits.
3. Professional, administrative and executive personnel, and Clergy, are overtime exempt.
4. Other (hourly) employees are eligible for overtime compensation, should they need to work more than 40 hours in a work week.

## **Background Check**

Prior to being hired, all people who work in Christ Church pass a background check with appropriate rigor for the nature of their work.

## **Job Descriptions**

Before starting work, employees receive a written job description that outlines job duties and responsibilities. Employees are expected to: understand it, discuss any questions with their supervisor, review it regularly, update it annually as part of their annual review process, and use it to shape their goals for the upcoming year.

The Church reserves the right to revise and update job descriptions as it sees necessary and appropriate.

## **Initial Employment Review**

New employees will participate in a performance review after 60 days of employment, and establish goals for either the coming six months, or until the annual review in the late summer.

## **Annual Job Performance Evaluations**

All employees' work will be reviewed at least annually, normally late in the summer or fall, early enough to support budget planning in the late fall and winter. In some instances more frequent reviews and updates may be necessary; ideally supervisors conduct informal reviews frequently to keep expectations aligned.

Evaluations measure performance against the written job description and written goals for the period of performance. Evaluations will be conducted by the employee's supervisor, and will include feedback across the range of people with whom the employee works. Evaluations will identify strengths, weaknesses, key development

needs, and goals, based also on the needs of the church. This process will identify changes in the job, re-calibrating to emerging needs of the church.

The rector of Christ Church participates with the vestry in a Mutual Ministry Review in October. This process is intended to hold the rector, as Head of Staff, accountable to the same review processes and courtesies as other employees, because we have mutually determined these are fair and reasonable.

Reviews will also determine *eligibility* for compensation adjustments based on merit, which occur in February after the budget has been approved. Merit increases do not preclude cost of living adjustments.

Only after the Finance Committee has received written verification that an employees' assessment was completed, is in the files, and that the job description has been updated, can the Finance Committee approve adjustments in compensation for the new year.

### **Personnel File**

As Head of Staff, the Rector maintains personnel files for each employee, to include: application, promotions, payroll deduction authorizations, benefits, annual reviews, exit interviews, and other limited information. These files are kept private. An employee may review their file at reasonable times.

Personnel information is generally not released to a third party. Unless the employee provides written authorization, Christ Church will only provide verification of the dates of employment, the last or present job title, and the fact of the employment.

### **Attendance**

The normal work week is 40 hours.

The Office is open from 8:00-4:00 Monday through Friday.

Employees are expected to be present at work in accordance with the schedule established with their supervisor, as part of their job description. Schedule flexibility is determined by the needs and nature of the jobs, as discussed and arranged with the employee's supervisor.

Comp-time is given to non-exempt (hourly) employees in order to maintain a 40-hour week. Time off is given in the same week or the following week; it cannot be accumulated.

Exempt (salaried) employees are paid for the completion of specific jobs and not for a set number of hours. It is expected these employees work at least 40 hours, and that these employees work the number of hours it takes to do their jobs.

**Time Reporting**

All personnel fill out and file a bi-weekly time report to capture total hours worked and any vacation or leave. Supervisors, the Rector, and/or the Financial Secretary review and/or approve the time reports prior to pay days. The Financial Secretary maintains historic timesheets.

**Payday**

Full-time, salaried (exempt) employees are paid on the 15th and the last day of the month. Non-exempt and part-time employees are paid on the pay day just after their time cards have been approved by their supervisor, the Rector, and the Comptroller; this is most often twice a month, but depends on receipt of approved time cards.

**Absence or Being Late**

Absences or tardiness should occur infrequently and only when necessary. Prior to scheduled work, employees need to let their supervisor know they will be absent or late. It is expected employees will make up late time on the same day. Non-approved or excessive absences, or habitual tardiness, may be grounds for discharge.

**Job Abandonment**

Employees who do not call in or report to work for two consecutive workdays, may be considered to have voluntarily resigned.

**Resignation of Rector**

This process is handled by Canon Law and Diocesan policies, with the guidance of the Bishop.

**Courtesy Resignation of All Staff After Resignation of a Rector**

After a Rector resigns, and once a new Rector begins, it is customary in the Episcopal Church for all staff to offer their resignation, as a courtesy, so the incoming Rector can build a team according to their best understanding of the personnel needs of the Church.

**Resignation of Lay Employees and Associates**

If an employee is considering resigning, it is expected they will discuss it with their supervisor. It is generally mutually beneficial to review the situation together before any decisions become final.

If an employee decides to resign, it is expected that they will give a minimum of 2 weeks notice by formally submitting a notice of resignation to their supervisor. Less notice will automatically forfeit payment of remaining vacation time. Additionally, the employee needs to contact the Rector for an exit interview appointment.

One week prior to leaving, the employee needs to confirm with their supervisor the following: final details for transition, training for a successor, completion of ongoing projects, organizing files for others' easy use, and a scheduled exit interview.

On their last day of employment, employees need to ensure they have: returned all church property and equipment, removed their belongings, reviewed compensation and settled final pay with the Warden, and submitted exit interview information.

### **Supervisor Checklist for Staff Resignation**

1. Evaluate need to fill vacancy or re-allocate workload. If needed, initiate hiring process.
2. Exit interview: Schedule, conduct, document and place in formal personnel file. Provide feedback to appropriate personnel regarding exit interview.
3. Collect church property: computer, camera, phones, keys, etc.
4. Cancel user accesses for all systems (voicemail, network, webpages. . . .etc.)
5. Notify comptroller/treasurer of the employee's last day to ensure no additional time is paid.

### **Exit Interviews**

An exit interview is required, and should be performed by the Rector or Senior Warden and one of the following: Senior Warden, Junior Warden, Chair of the Personnel Committee. Forms for exit interviews may be found in **Appendix B** of this document.

### **Discipline of a Rector**

If the Vestry assesses the Rector is failing to live into his/her responsibilities, they will clearly and repeatedly communicate their grievances to the rector. It is expected that the rector and the vestry will try every available resource to help them communicate their differences and form a plan for moving forward together. If, however, after repeated attempts at communication, an impasse remains, the Wardens will formally contact the Bishop. Under the Bishop's guidance a Diocesan process for discipline may then be implemented at the bishop's discretion.

### **Discipline and Employment Termination of Lay Employees**

Employment with Christ Church is at will. Both the employee and the Church have the right to terminate employment at any time, with or without cause.

It is the intention of Christ Church to give employees opportunities to correct performance or behavioral problems. Christ Church has adopted the progressive, corrective process outlined below as a guideline for handling employment problems.

However, if the supervisor and wardens believe correction is unlikely, or for any other reason, Christ Church reserves the right to discharge employees at will.

No employee will be discharged without prior approval of the senior warden and rector.

In most circumstances, job termination is the result of:

1. **Serious infractions**
2. **Behaviors** incompatible with the teachings and values of Christ Church
3. **Inadequate job performance**
4. **Reductions of staff** for financial reasons

In the case of **serious infractions**, the employee is likely to be dismissed immediately, with neither severance nor accrued vacation.

In the case of **inadequate job performance**, or **behavioral issues**, the corrective action may follow the process outlined below. However, corrective action will take into consideration such factors as the severity of the problem, the nature of the problem, the employee's overall performance, as well as the supervisor, rector, and the senior warden's evaluation of the likelihood of satisfactory improvement. Severance and accrued vacation will not be paid if the employee is discharged for misconduct. If the employee is discharged for inadequate job performance, severance is unlikely, but accrued vacation will be paid.

In the case of **reduction of staff** for financial reasons, as much notice as possible will be given, and efforts will be made to provide severance of one week per year of service, up to 6 weeks.

The following are examples, not an all inclusive list, of grounds for discharge or other disciplinary action:

- Inadequate work quality or quantity
- Improperly treating other employees or any other non-employee associated with the Church
- Insubordination, lack of cooperation, or failing to follow instructions or perform work requested by a supervisor
- Failing to meet supervisor's expectations for efficiency and productivity
- Absenteeism, tardiness, or abuse of breaks or flexible schedule privileges, including unauthorized late arrival and early departure
- Improper or careless handling of Church property or property of employees or other people associated with the Church
- Falsifying any personnel, financial, or other records
- Possession or use of unauthorized firearms or illegal drugs on church property
- Acting in conflict with the interests of the church at any time, including off-hours disorderly conduct or violation of any law which may cause the employee to be perceived as unsuitable for employment
- Disclosing confidential or sensitive information inappropriately

## **Progressive Corrective Actions for Job Performance or Behavioral Issues**

When work performance or behaviors do not meet Christ Church's standards (see job descriptions on file, and Core Competency lists in **Appendix A**), supervisors will identify the issues early, clearly, and with compassion, encouraging employees to learn from mistakes and grow.

Christ Church expects supervisors and employees to follow the process outlined below to allow sufficient opportunity for employees to correct behaviors and performance.

### **1. Informal Counseling**

If an employee's performance or conduct fails to meet requirements, their supervisor provides informal feedback immediately, constructively explaining how expectations are not being met. Together the employee and supervisor identify a corrective path forward, including milestones for re-assessing progress.

This should be a frequent (even monthly) activity between all employees and their supervisors. It is a healthy and constructive mechanism for clarifying and coordinating expectations.

### **2. Formal Counseling as Oral Warning**

If informal counseling has not corrected performance, the supervisor meets formally with the employee to provide the employee with an oral warning and a written definition of the problem in terms of behaviors and outcomes. The supervisor will also identify corrective action including milestones for reassessment, and a timeline of consequences if deficient performance continues. The supervisor will provide the rector and senior warden with documentation of formal counseling. The supervisor will maintain dated documentation, *but not* place it in the employee's file.

### **3. Formal Written Warning and Probation**

If, following informal and formal oral counseling, an employee is still not performing to standards, the supervisor and employee will meet again. During this meeting, the supervisor will present written documentation, place the employee on formal probation, and explain their employment may be terminated unless performance is corrected during probation. The supervisor and Senior Warden will determine the length of probation and schedule a progress review for the end date. The supervisor will place signed and dated documentation in the employee's file.

During probation the employee's pay and benefits remain unchanged.

The supervisor and Senior Warden will keep appropriate documentation of performance throughout probation; this will become part of the employee's file.

If the supervisor and Warden believe correction is unlikely to be successful, they may decide not to provide probation, or curtail it. Again, Christ Church reserves the right to discharge an employee any time, with or without cause.

#### **4. Probation Review**

At the end of the probation period, the Senior Warden and supervisor will review the employee's performance and associated written documentation.

If the employee has been able to correct work or behavioral deficiencies and perform satisfactorily during the probation, their employment status will be restored at the end of the probation period.

If an employee is unable to sufficiently correct work or behavioral deficiencies, the supervisor and Senior Warden will begin to terminate employment. Again, Christ Church retains the right to terminate the individual's employment at any time during the probationary period for unsatisfactory progress.

#### **5. Employment Termination**

If the supervisor and Senior Warden decide terminating employment is necessary, they will inform the employee in writing and during a meeting. During this meeting the following will occur:

1. Documented exit interview.
2. Employee returns all church property: keys, files, equipment etc.
3. Employee removes their belongings.
4. Warden and employee settle final pay.

## **Section II YOUR WORKPLACE**

### **Personal Appearance**

Employees of Christ Church are expected to dress and present themselves in a manner consistent with professional dress codes, to make feel parishioners, and others with whom employees comes into contact, feel comfortable.

### **Comportment and Communication**

All visitors, callers, and people who communicate with Christ Church staff in any manner are to be treated with timely sensitivity and respect. Church staff behavior should convey cheerful, professional understanding and compassion.

Employees are expected to avoid communication among themselves when a visitor is present or someone is attempting to communicate with Christ Church.

Employees are expected not to interrupt a fellow staff with a visitor, or with a person attempting to communicate with Christ Church.

Employees are expected to minimize personal communication and business during work times.

All employees have the responsibility to ensure that Christ Church affairs and communication are handled with faith, confidentiality, honesty, and propriety.

All employees should continually build parishioner goodwill with genuine friendliness and by consistently being courteous, enthusiastic, and efficient.

### **Communications Technologies**

Each employee must ensure they use personal and business communications tools in a manner that is professional, legal, does not compromise the confidentiality of sensitive information, and maintains good stewardship of the missions of Christ Church. Business tools are provided for the employees to fulfill their job responsibilities; personal use during work is discouraged.

Employees have no privacy regarding information created or used on Christ Church's computer/communications resources. Christ Church reserves the right to access, review, and monitor all materials and information on its resources without warning.

Misuse or overuse of communications resources will result in disciplinary action, up to and including termination of employment.

### **Mobile, Flexible Ministry**

Good pastoral care requires priests to work out in the world, and out of the office. People often prefer to meet over coffee within the casual atmosphere of the coffee shop rather than coming into the church office. Additionally, mobile technology allows priests to have access to parish members and his/her files from anywhere. A priest who is working out in the community, from the library or coffee shop, creates a visible witness to the Church in a way that the priest in an office cannot do.

The Church also recognizes flexibility in the working schedule. Priests are often working on their "off" days, acting in a pastoral capacity (e.g., Saturday funerals), or executing programming (e.g., youth group lock-ins). Again, mobile technology allows priests access to all their contacts and files in the early morning and at night.

Of course, in order to supervise administrative staff, touch base with office volunteers, meet people for confidential appointments, and be present for the occasional visitor, the priest needs to be in the office, and often within the hours of a normal work-day.

Clergy are therefore expected to maintain a balance regarding being in the office during regular workday hours and working remotely and/or in the early morning or evening. It is understood that this balance will be at least 60% in the office.

### **Confidentiality and Sensitive Information**

Christ Church employees work in a position of trust. They are expected to treat all personal information about parishioners as sensitive, and never make public any sensitive information. Release of confidential or sensitive information is grounds for discharge.

### **Non-Church-Business Activities**

Employees are encouraged to participate in civic, trade or professional organizations provided such activity does not unduly interfere with regular duties. Supplies, materials, and other property and facilities belonging to Christ Church must not be used in more than an incidental way in support of such activity, unless approved by the Rector, and/or the Vestry.

### **Financial Ethics**

The following statement shall be presented and signed at the time of employment and reaffirmed annually during employment reviews:

*All funds and property received and administered by Christ Church are entrusted by God through the faithful financial support of church members. The highest degree of Christian stewardship and fiduciary responsibility is expected of all ministers and staff in matters relating to the receiving, reporting and use of such funds and property. Ethical, moral and legal conduct is a critical component of Christian stewardship. Fiduciary responsibility also includes loyalty to the objectives and purposes for which the funds*

*have been allocated, prudence and care in the administration of entrusted funds and property and personal commitment to the highest standard of fiscal responsibility.*

### **Equal Employment Opportunity Policy**

Christ Church employs the best qualified personnel in all positions, with equal opportunity for advancement, and does not discriminate based on race, color, age, sex, sexual orientation, ancestry, marital status, veteran status, or any other protected class.

All employees are responsible for supporting the concept of equal opportunity and affirmative action and assisting Christ Church to meet these standards.

### **Drugs and Alcohol**

Christ Church is a drug and alcohol-free workplace. Possessing, purchasing, distributing, selling, or having alcohol or controlled substances in your system during work hours, will result in disciplinary action, including discharge. Naturally, this does not pertain to the administration of Communion.

### **Smoking**

All church buildings are designated as non-smoking areas.

### **Good Housekeeping**

Employees are expected to clean up after themselves daily in the kitchen, refrigerator, great hall or any other areas for preparing or eating food, or working away from an office. The kitchen and refrigerator and common rooms should be ready for use without any clean up by any volunteer group at any time.

### **Anti-Harassment<sup>1</sup>**

Christ Church is committed to maintaining a work environment free from all forms of harassment or intimidation based on age, race, creed, color, handicap, marital status, sex, national origin, ancestry, sexual orientation or any other legally proscribed basis of employment discrimination. Harassment may occur whenever unwelcome conduct, comments, touching, teasing, joking or intimidation based on any of these bases interferes with work or creates an intimidating, hostile or offensive environment. Unwelcome sexual advances, requests for sexual favors, and other verbal, visual or physical conduct of a sexual nature are also serious violations of this policy and are also prohibited. Harassment occurs whenever submission to such conduct is made either explicitly or implicitly a term or a condition of an individual's employment, or whenever submission to or rejection of such conduct is used as the basis for employment decisions.

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<sup>1</sup> This policy was reviewed by Christ Church's attorney as well as our insurance underwriters, in the summer of 2014.

Any employee who violates this Policy will be subject to corrective action, which may include discipline up to and including discharge.

Conduct, comments or behavior which might be offensive to Christ Church workers might be considered inoffensive by others. Because of this, it is difficult for Christ Church to learn of and take effective action to halt harassment unless the affected individual alerts the Rector, either of the Wardens or a member of the Vestry both to the occurrence and the fact that the conduct in question is offensive or unwanted.

Several options are available to individuals who feel they are subject to harassment. Affected individuals should first approach the alleged harasser and ask him or her to cease the offensive activity. If this is not effective in stopping the harassment or if the individual feels uncomfortable raising the matter with individuals named above, the individual should report the conduct to the Christ Church representative as set forth above. If the matter is not resolved with the person to whom it is initially reported and the problem persists, the affected individual should bring the matter to the attention of another Christ Church representative.

*You are not required to approach the harasser or any other specific individual.* You may go straight to the Christ Church representative of your choice (Rector, Associate Rector, Senior or Junior Warden, Vestry Member) if you wish, even for what you may consider a minor harassment incident. *You are required, however, to report harassment to **somebody** in a position of responsibility at Christ Church.* Christ Church will make every effort to halt any harassment. This Policy will not be effective, however, without the cooperation of all employees. Any individual who believes that s/he has been subjected to harassment has the duty to promptly bring this fact to the attention of management so that the problem may be confronted. All employees will be held responsible and accountable for avoiding or eliminating prohibited conduct.

We treat all claims of harassment seriously. All claims will be investigated, and confidentiality will be maintained as much as possible during the investigation. If an investigation reveals that harassment has occurred, we will take immediate and appropriate corrective action reasonably designed to halt the harassment and prevent recurrences, which may include discipline or discharge of the harasser.

Retaliating or discriminating against someone for complaining about harassment is prohibited. Retaliating against witnesses or other individuals who cooperate in a harassment investigation is also prohibited. If you believe you have been retaliated against, even if the retaliation is subtle, report this fact *immediately* to any of the above listed Christ Church representatives. Anyone found to have retaliated against an individual because of a harassment complaint or because of cooperation in the investigation of a complaint will be subject to discipline.

**Injuries**

First Aid kits are available in the Church office, and the kitchen. If you are seriously injured, you will be assisted and referred to obtain medical examination and treatment. For insurance purposes, please notify the Senior Warden promptly.

A defibrulator is in the Great Hall, on the coffee wall.

**Fire Safety**

All staff should be aware of where fire extinguishers are, and know how to use them.

They are located:

- 1) Hallway between the church office & great hall
- 2) Great hall
- 3) Kitchen
- 4) Stairway up to the music room
- 5) Entrance into church from the garden vestibule
- 6) Columbarium / nursery area
- 7) Sunday School hallway
- 8) Just outside the door to the boiler room

## **SECTION III: BENEFITS**

The Church Administrator functions as the Benefits Administrator, and maintains current documents and information on all benefits and policies.

### **Paid Time Off**

Part-time employees are hired without vacation or holiday benefits, or paid time off.

#### **Holidays**

The Church Office is closed the following 9 days:

1. New Year's Day (if on Sunday, it is Monday)
2. Martin Luther King Day
3. Good Friday
4. Memorial Day
5. July 4
6. Labor Day
7. Thanksgiving Day AND the following Friday
8. Christmas Day (if on Sunday, it is the succeeding Monday)

#### **Vacation**

Your letter of employment specifies eligibility and the accrual rate of vacation days.

Vacation days must be requested in writing and scheduled at least two weeks in advance with the Rector. If there is a schedule conflict, preference is given to the first requestor.

All vacation days are recorded on timesheets.

Employees should use vacation days annually. If necessary, five vacation days may carry over one calendar year.

If an employee is discharged for misconduct or poor performance, the Rector in consultation with the Senior Warden, may determine the employee will not be paid for accrued vacation days.

If an employee resigns with at least two weeks notice, they will be paid for accrued vacation days.

#### **Other Paid Leave**

##### **Sick Leave**

All employees are expected to do their best to keep healthy. When contagious, employees should stay home. As well, employees need to inform their supervisor as soon as possible prior to scheduled work, and support substitutes or adjustments, including partial work from home, to smooth operations.

If an illness will prevent an employee from coming to work for a longer period of time, they need to consult with the Rector and Senior Warden to determine if short-term unpaid leave or disability is needed.

#### Bereavement Leave

After one year of continuous service, full-time employees will be eligible at the Rector's discretion for up to three days away from work, with pay, to arrange and/or attend the funeral of an immediate family member (spouse, child, parent, grandparent, grandchild, brother, sister, stepchild).

#### Hardship Leave

Depending on circumstances, after one year of continuous service, if an employee experiences an illness or serious hardship, the Rector and Wardens/Vestry may consider granting paid leave for up to 10% of the employee's work hours/service/annual pay. Generally, time away or payment for unworked hours cannot exceed 10% of annual work days/hours or pay.

#### Short Term Disability Leave

Christ Church buys short-term disability insurance for lay employees who work more than 35 hours a week. Once an employee has demonstrated a disability to the satisfaction of the insurance provider, the employee may receive up to 70% of their comp for up to 52 weeks. Refer to the Unum Short Term Disability Coverage Highlights and policy for details.

#### Long-Term Disability (and Life Insurance)

Christ Church buys life insurance and long-term disability insurance for full-time Clerical employees. Long-term disability insurance roughly covers up to 60% of salary for the duration of disability. Refer to the Unum Group Long Term Disability Plan Policy 559179 012 for details.

#### Parental Leave

Leave related to pregnancy or related complications are covered through medical leave (discussed below in next section).

After one year of continuous service, all full-time employees are eligible for paid leave after the birth or adoption of a new child.

After the birth of a child, mothers are encouraged to take 6 weeks paid leave to support recovery and begin establishing healthy family dynamics. They are also eligible for up to 6 weeks of unpaid leave.

After the birth of a child, fathers are encouraged to take 4 weeks of paid leave to begin establishing healthy family dynamics. They are also eligible for up to 8 additional weeks of unpaid leave.

After adoption of a child a parent is encouraged to take 4 weeks of paid leave to begin establishing healthy family dynamics. They are eligible for an additional 8 weeks of unpaid leave.

Parents may elect to use some of their vacation to supplement their paid leave.

## **Unpaid Time Off**

Because of its size, Christ Church is *not* a "covered employer" obligated to the standards of the Family and Medical Leave Act.

Requests for unpaid leave of absence will be considered for personal, family, medical, bereavement, military duty, and disability reasons. During unpaid leave other non-pay benefits will continue. More specifics are addressed below.

In all cases where possible, employees must request unpaid leave at least two weeks in advance, in writing, stating: the starting date, the date of planned return, and the reason for leave. Requests will be reviewed by the employee's supervisor, the Rector, and the Senior Warden, and granted at the discretion of the same.

Upon the employee's return, effort will be made to restore their former position. However, Christ Church cannot guarantee a position will remain open. An employee would be offered another opening for which they are qualified if one is available.

### **Personal Leave**

After one-year of continuous service, employees may take up to 10 days of unpaid personal leave in a year, at the discretion of the Rector and/or Vestry

### **Medical Leave**

After one-year of continuous service, employees may take up to 6 weeks a year without pay, with a physician's written statement that certifies need for leave and estimates the length of leave time necessary. During this time other non-pay benefits will continue. (Note: 6 weeks is about 12% of the year; it could be used by itself or combined with hardship leave if necessary.)

### **Family Leave (not including Maternity/Paternity Leave)<sup>2</sup>**

After one year of continuous service, all employees will be eligible for a maximum of two weeks in any one calendar year for family/medical leave without pay. Accumulated paid leave or vacation may also be used. Employees are expected to make a reasonable effort to schedule leave in a manner that minimizes disruptions to Church operations. Employees are also expected to give their supervisor, the Rector, and Senior Warden advance notice in a reasonable and practical manner.

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<sup>2</sup> Family Medical Leave Act requires organizations with 50 or more employees to provide up to 12 weeks of unpaid leave to care for family members. Christ Church is *not* obligated as an FMLA organization, based on size.

### **Parental Leave for Birth or Placement of a New Child**

After the Birth or Placement of a Child, and after one year of continuous service, the primary parent of a newborn or newly-adopted child is eligible for unpaid leave so that their total eligible leave time is 12 weeks. Christ Church will attempt to maintain their position and benefits during this time. Parents should keep in mind that total leave is limited to 12 weeks.

### **Military Leave**

The Church complies with applicable state and federal laws concerning leaves for military service.

### **Workers' Compensation Leave**

If an employee has a work-related injury or illness, the church complies with applicable state and federal laws concerning leave. Leave would be reviewed on an individual basis.

### **Limits on Total Leave**

Christ Church attempts to generously accommodate various needs for paid and unpaid leave. At the same time, Christ Church has must maintain and support smooth operations for our parish. In most cases, leave of any sort is limited to a total of 12 weeks, plus any vacation and holidays, for each calendar year. Employees may not arrange consecutive leaves across calendar years if it results in more that 12 weeks away from work, total. Twelve weeks represents approximately 23% of a year.

### **Educational Assistance and Professional Memberships**

Where it can be demonstrated that the Church will benefit from an employee's participation in an educational program or professional organization, the related expenses may be paid by the Church. Request for payment of expenses related to educational programs and professional organizations must be approved by the Rector in advance. If not budgeted, they must be approved by the Vestry.

### **Health Insurance**

Clergy and lay employees required to participate in the Medical Trust's health plans are those who are scheduled to work at least 1,500 compensated hours per year for any domestic diocese, parish, mission, or for any other ecclesiastical organization or body subject to the authority of the Church (and whose diocese has determined it must participate.) (Canon I, Sec 8).

Christ Church pays at least 90% of these employee's health care premiums.

In addition to the Benefits Administrator, the Treasurer maintains current Group Health Plan information, and manages it in consultation with the Finance Committee and Diocesan expert in health care benefits.

## **Retirement Investment**

### **Clerical Employees**

Pension contributions will be paid according to Episcopal Church Canons.

### **Lay Employees**

According to Episcopal Church Canons (Canon III. Sec 3), Christ Church is obligated to contribute to the retirement savings for all lay employees working 1000 hours or more annually. If a defined benefit plan is selected, the employer assessment and/or contribution shall be not less than nine (9) percent of the employee's compensation; if a defined contribution plan is selected, the employer shall contribute not less than five (5) percent of the employee's compensation and match at least four (4) percent of the employee's contributions. %. Vesting rights are immediate.

## **Life Insurance**

Christ Church provides life insurance for full-time clergy who have completed an initial 30 days of service, and work in excess of 40 hours a week.

## **Housing Allowance**

A portion of the Clergy's salary can be paid in the form of a housing allowance. Each year the Vestry is required to authorize this form of payment. This money is not subject to self-employment tax.

## **Worker's Compensation Insurance**

All employees are automatically covered by Workers' Compensation Insurance at the time they are hired. The church pays 100% of the premiums. The following benefits are provided to employees who sustain a work-related injury or illness:

- partial wage replacement for periods of disability
- medical care, including medicine, hospital, doctor, x-rays, crutches, etc.
- rehabilitation services if necessary.

If you are injured a written report of your injuries must be submitted to the Wardens as soon as possible (within a day).

## **Unemployment Insurance and Social Security**

According to State and Federal laws, Christ Church contributes to required levels of Unemployment Insurance and Social Security for all employees.

## **CONCLUSION**

This document is to be reviewed annually by the Personnel Committee and Head of Staff, during the cycle of Employees' Annual Reviews. Changes will be incorporated annually into the updated version.

To avoid floating and lost memoranda, additional documents should be attached to this handbook as appendices. Legal or other information should be incorporated as footnotes or endnotes.

This document will be in effect only during the year after it has been reviewed. Prior versions will be archived by the church administrator, but will not be in effect or binding on the church.

## Appendix A: Core Competencies

Below is a fairly comprehensive list of core competencies relevant to the lay and clerical staff at Christ Church. Holding every employee accountable to all of these standards is unrealistic. But having all staff and vestry read through them periodically, grounds our shared high standards of behavior and performance in our church community and in the world.

This information is excerpted from materials provided by Susan Beaumont during her seminar *Stepping up to Supervision*, sponsored by the Alban Institute and UW Madison Continuing Education. May 20-21, 2013.

### Personal Competencies

These competencies allow an individual to be effective in the daily conduct of their work lives.

**Attention to Detail:** Consistently attends to the many small pieces which must be assembled into an organized whole; follows up on missing or out of balance items; resolves unanswered questions needed to address a problem; keeps the larger picture in mind while tending to the smallest of details.

**Aesthetic Awareness:** Demonstrates a natural awareness about the effective organization of space for different purposes; possesses a natural orientation towards cleanliness and orderliness of space; appreciates the value of and need for sacred space and knows how to physically tend to it.

**Creativity and Innovation:** Generates new ideas; makes new connections among existing ideas to create fresh ideas to create fresh approaches; takes acceptable risks in pursuit of innovation; learns from mistakes; has good judgment about which creative idea and suggestions will work.

**Compassion and Care:** Exudes a natural sense of care for the well-being of others; responds with empathy to the life circumstances of others; communicates a sense of support in his or her very presence; demonstrates appropriate and bounded expressions of care.

**Ethics and Values:** Honors the core values and beliefs of the organization in his/her choice of behaviors; consistently embodies appropriate behavioral choices in both stressful and non-stressful situations; practices the behaviors he/she advocates to others.

**Influencing Others:** Encourages others to cooperate, participate, provide resources or make decisions, in service to the work at hand; uses verbal and nonverbal skills to communicate respect for others, and to generate energy, passion, and commitment to an idea; creates an environment that others want to participate in.

**Initiative:** Enjoys working hard; is action-oriented and energetic about worthwhile activities; not fearful of taking calculated risks; seizes opportunities; sets demanding but achievable objectives for self and others.

**Integrity and Trust:** Is seen as trustworthy by others; practices direct, honest and transparent communications; keeps confidences; admits mistakes; doesn't operate with hidden agendas; responds to situations with constancy and reliability.

**Interpersonal Skills:** Establishes good working relationships with all others who are relevant to the completion of work; works well with people at all levels of the congregation; builds appropriate rapport; considers the impact of his/her actions on others; uses diplomacy and tact; is approachable; avoids communication triangles

**Listening:** Engages in thoughtful and attentive listening; listens beneath the surface for real intent that may contradict the spoken message; overcomes personal bias to genuinely hear the ideas and concerns of another; can describe the perspective of another, even when he/she disagrees.

**Mission Ownership:** Demonstrates understanding and full support of the mission, vision and values and beliefs of the congregation by consistently behaving in a manner congruent with them and supportive of them.

**Personal Resilience:** Can effectively cope with change and uncertainty; can shift gears comfortably; can decide and act without having the total picture; isn't upset when things are up in the air; can comfortably handle risk and uncertainty; is flexible.

**Self Development:** Sets appropriate personal work objectives, measures own progress, identifies personal gaps in knowledge, understanding and skill; undertakes appropriate activities to develop needed skills; seeks regular feedback on performance; knows personal strengths and weaknesses; is sensitive to changing personal and organizational requirements and changes accordingly.

**Self-Differentiation:** Demonstrates strong and appropriate personal boundaries in relationships; has a healthy appreciation of self, without being egotistical; is emotionally mature; can maintain a non-anxious presence in the midst of turmoil; not overly dependent upon outside affirmation; works to build a strong personal support system.

**Technical Expertise:** Acquires and demonstrates the technical skills required to proficiently execute the essential functions of the job; understands which skills are lacking and seeks to develop those skills; continually works toward the mastery of technical proficiency.

**Time Management:** Is able and willing to focus time on tasks that contribute to organizational goals; uses time effectively and efficiently; values time and respects the time of others; concentrates his/her efforts on the most important priorities; can appropriately balance priorities.

**Verbal Communication:** Is able to deliver a message clearly, articulately and with appropriate emotion in a variety of settings; demonstrates communication styles appropriate to the situation at hand; adjusts the message, without losing the essence of the message, depending upon the circumstance and the listener.

**Written Communication:** Is able to write clearly and succinctly; employs correct grammar, punctuation, and patterns of speech; clearly delivers message in a tone appropriate to the context. Chooses appropriate format and channel.

## **Organizational Competencies**

These competencies allow an individual to operate effectively in an organizational setting.

**Conflict Management:** Understands the dynamics of human negotiation among conflicting interest groups and how to achieve mutual agreement; embraces constructive conflict as a means to promote growth; reads situations quickly; can find common ground and get cooperation with minimal anxiety.

**Decision Making and Problem Solving:** Uses sound logic to approach difficult problems and apply effective solutions; can distinguish between symptoms, causes and implied solutions; decides in a timely manner based upon a blend of research, experience, risk-taking and judgment.

**Helping Orientation:** Demonstrates concern for and attends to the needs of the congregation's internal and external constituencies; projects a sense of empathy and understanding when dealing with members and friends of the congregation; is able and willing to supply answers and resources that others find satisfying.

**Negotiation:** Skillfully navigates potentially contentious situations with other staff, lay leaders and members; can settle differences with minimal conflict; can gain compliance or commitment while keeping relationships healthy; can be direct and forceful as well as diplomatic; gains trust of others quickly.

**Organizational Knowledge:** Knowledgeable about how congregational communication, decision-making, and leadership works; knows how to get things done through formal and informal decision-making channels; can maneuver through charged political situations effectively and quietly; anticipates organizational barriers and plans his/her approach accordingly.

**Priority Setting:** Spends his/her time and directs the time of others to what is important; quickly zones in on the critical issue, and ignores or minimizes distractions; can sense what will help or hinder accomplishing a goal; eliminates roadblocks; demonstrates focus.

**Project Management:** Identifies the key objectives and scope of a proposed project; garners needed resources and project support; develops a realistic and thorough plan for achieving key objectives; keeps team members briefed on progress; implements action plans; communicates progress to sponsors; identifies and resolves barriers and problems.

**Team Orientation:** demonstrates interest, skill and success in team environments; promotes group goals ahead of personal agendas; steps up to offer self as a resource to other members of the team; understands and supports the importance of teamwork; shares credit for success with others; takes responsibility for his or her part in team failures.

## **Supervisory Competencies**

These competencies allow an individual to be effective in the supervision of others.

**Delegation:** Clearly and comfortably delegates both routine and important tasks and decisions; appropriately shares authority and responsibility; creates accountability; sets clear objectives and measures; monitors process, progress and results; builds feedback loops into the work; trusts people to perform their own work.

**Developing Others:** Provides others with challenging and stretching tasks; holds frequent developmental discussions; is aware of the developmental aspirations of others; encourages people to accept challenging assignments.

**Hiring and Staffing:** Identifies new talent; attracts and hires the best people; clearly defines the essential functions and core competencies of a role before hiring; is not afraid of selecting strong people; does not discriminate in hiring practices; seeks to strengthen the team through the addition of diversity.

**Motivating Others:** Creates a climate in which people want to do their best; can motivate employees, volunteers, and members; empowers others; invites shared input and decision making; makes each individual feel that his/her work is important.

**Supervising Work:** Is good at establishing clear expectations and setting clear direction; sets stretching objectives; distributes the workload appropriately; provides regular and ongoing feedback about performance; proactively deals with substandard performance; engages disciplinary processes in a timely manner.

**Teambuilding:** Blends people into teams when appropriate; leads the team successfully through difficulties and challenges, including conflict, diversity and inclusion issues within the team; creates strong morale and spirit in his/her team; shares wins and successes; defines success in terms of the whole team; creates a feeling of belonging and pride in the team.

**Informing Others:** Provides the information people need to know to do their jobs well; helps people understand the information and knowledge and its relevance to the task at hand; is timely and transparent in the sharing of information.

## **Managerial Competencies**

These competencies describe the behaviors and skills of an effective manager.

**Change Management:** Seeks organizational innovation with a purpose; leads others in innovation activity; creates a prudent risk-taking environment; embraces life-long learning for oneself and for others; accepts the mistakes of others and turns them into learning opportunities; identifies alternatives to status quo and advocates system changes when barriers to change are identified.

**Diversity Management:** Manages all kinds and classes of people equitably; committed to the promotion of equal opportunities; ensures ongoing consultation with people that represent all types of difference; ensures that processes and practices are adaptable to different needs, abilities and ways of working.

**Fundraising:** Thinks innovatively about new sources for funding the ministries of the congregation; coordinates and executes venues for fundraising in accordance with congregational policy; is willing and able to ask others to contribute financially; coordinates fundraising efforts with the larger stewardship efforts of the congregation.

**Leadership Development:** Encourages others to discover and engage their giftedness and skills in service to the larger community; calls out the best in others; supports others in the development of their skills and abilities; actively seeks to engage others more directly in the leadership life of the congregation; thinks strategically about the continual need for a next generation of leaders and works to build the leadership base.

**People/Volunteer Management:** Provides direction, gains commitment facilitates change and achieves results through the efficient, creative and responsible deployment of volunteers; engages people in their areas of giftedness and passion.

**Process Management:** Good at figuring out the processes necessary to get things done; knows how to organize people and activities; understands how to separate and combine tasks into efficient work flow; knows what to measure and how to measure it; can see opportunities for synergy and integration; can simplify complex processes and create policy for repetitive processes.

**Strategic Management:** Is future-oriented and can visualize the larger picture of where the organization is heading; identifies and prioritizes strategic objectives that are consistent with the vision of the organization; creates effective breakthrough objectives to carry out strategies; balances risk with desired outcomes.

**Vision and Purpose Management:** Establish a clear, achievable and compelling vision and core purpose; articulates possibilities, is optimistic; creates mileposts and symbols to rally support behind the vision; makes the vision sharable by everyone.

## **Pastoral Competencies**

These competencies describe additional skills and attributes necessary to be an effective pastor.

**Hospitality/Accessibility:** Generates a sense of hospitality and or accessibility by his/her very presence; communicates a sense of availability, warmth, openness and approachability; fosters natural connections between members of the congregation and with visitors; supports a culture of welcoming and connection in the life of the congregation.

**Spiritual Maturity:** Shows strong personal depth and spiritual grounding; demonstrates integrity by walking the talk, and by responding with constancy of purpose; is seen by others as trustworthy and authentic; nurtures a rich spiritual life; seeks the wisdom and guidance of appropriate mentors; is able to articulate a clear and consistent theology.

**Preaching:** Is a consistently effective preacher; able to inspire from the pulpit; communicates a clear, consistent and relevant message through sermons that are carefully prepared and artfully delivered; projects the identity and character of the congregation through a pulpit presence.

**Teaching:** Designs effective lesson plans and facilitates learning experiences in both small and large group settings; selects teaching topics that are relevant, provocative and contribute to a deeper understanding of scripture, theology and spiritual practice; uses a variety of teaching topics to maintain interest and build connection.

**Worship Leadership:** Designs and facilitates relevant and inspiring worship; combines elements of theology, music, and art to promote experiences of the sacred; crafts worship flow that reinforces a theme or purpose; fosters worship moments that invite participants into an encounter with the divine; creates liturgical moments that embrace the work of the people in worship.

**Stewardship:** Promotes stewardship as a principle that guides both individual and congregational life; encourages generosity in the sharing of time, talent and finances; promotes a culture of abundance; supports leadership in the development of a comprehensive stewardship program.

**Social Witness:** Demonstrates a personal conviction to truth and justice; leads the congregation in its articulation of a social witness; advocates on behalf of the marginalized and the disenfranchised; encourages and exhorts others to do the same; encourages the development of congregational programs and ministries that allow the congregation to live out its social witness.

**Pastoral Care/Counseling:** Demonstrates the ministry of presence; creates a spirit of openness that invites those who are spiritually or emotionally troubled to confide in him/her; demonstrates appropriate pastoral care boundaries, recognizing his or her own

limitations as a care provider; respects confidences; appropriately refers congregation along to other professional care providers as warranted.

**Visitation:** Moves comfortably and easily around those who are ill or suffering; generates a sense of calm, hopeful presence; offers appropriate prayers and facilitates rituals that invite healing; demonstrates appropriate personal boundaries when caring for the ill and dying; stands as a calm, sure presence in the face of death.

**Spiritual Formation/Discipleship:** Demonstrates an understanding of spiritual formation/discipleship as a journey or process; invites others into reflection about personal spiritual journey; teaches a variety of spiritual practices to lead others in deepening and developing spirituality; creates teaching and small group environments that promote discipleship.

**Evangelism/Witness:** Stands ready to communicate and spread a message of good news, based upon the congregation's mission; articulates the message for members of the congregation, encouraging them to become evangelists and witnesses as well; supports a culture of evangelism, witness and ministry growth outside the walls of the congregation.

**Membership Development:** Supports the membership process of the congregation with a well-defined articulation of membership and its benefits; actively connects visitors with the life of the congregation in ways that support membership commitment and growth; understands the membership process of the congregation as a systems that incorporates hospitality, welcome, orientation, membership and deployment.

## **Appendix B: Exit Interview**

It is our hope that you will enjoy working at Christ Church and have a productive and successful experience here. If you should leave our employment, we would like to have an exit interview with you. The purpose of the exit interview is to give you an opportunity to receive answers to any questions you may have, and to provide the church with your opinions about working here, including your position, wages, benefits, and working conditions. We are particularly interested in your opinion about any improvements we might make. Your supervisor will arrange the exit interview a short time before your last day of work. We will appreciate your honest input.

**Name:**

**Supervisor:**

**Position:**

**Employment Dates:**

**What prompts you to leave?**

**How did your supervisor perform in the following areas?**

Demonstrating fair and equal treatment

Demonstrating recognition and appreciation

Developing cooperation and teamwork

Listening to encouraging of suggestions

Resolving complaints and problems

Following policies and practices

**How was your workload?**

**What were the best parts about your job?**

**What were the greatest challenges and/or frustrations in your job?**

**What suggestions would you make to improve the experience of your successor?**

# Appendix C: Template for Annual Performance Evaluation

## Annual Performance Evaluation

**Employee's Title Here**

**Employee Name:**

**Position Title:**

**Supervisor Name:**

**Supervisor Title:**

**Date of Review:**

**Period of Review:**

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**Goals for this review period:**

**Notable accomplishments from year in review:**

### Performance of Essential Functions and Responsibilities

Scale: 1 = Unacceptable (Does not meet expectations)

2 = Needs Improvement (Meets some but not all basic expectations)

3 = Meets Expectations (Consistently meets basic expectations)

4 = Exceeds Expectations (Meets basic and exceeds some expectations)

5 = Outstanding (Consistently exceeds expectations)

<b>Performance Expectations</b>	<b>Comments</b>	<b>Rating</b>
<b>Major Heading or Grouping of Essential Functions</b>		
Specific functions or responsibilities that should be measured.		
<b>Major Heading or Grouping of Essential Functions</b>		



<b>yy</b>		

**Additional Comments**

**Goals for the Coming Year or Review Period**