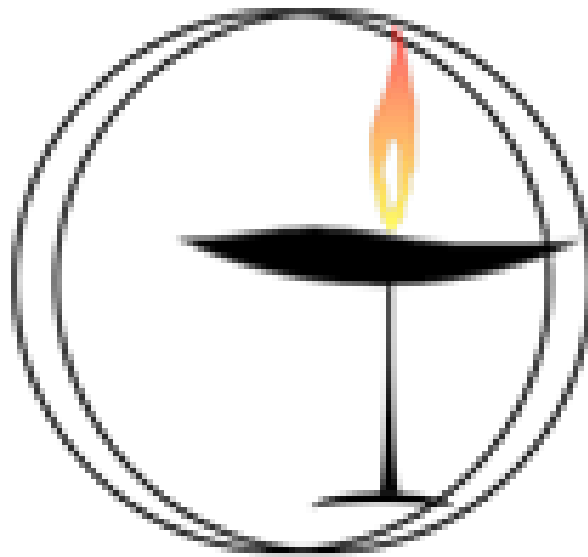


Created 11/7/2011

**The Miami Valley
Unitarian Universalist
Fellowship**



Personnel Manual

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1 Personnel Policies

With the exception of the minister(s) all employees of MVUUF are at-will employees (As defined by the laws of the state of Ohio).

All paid staff positions at MVUUF have job descriptions. These descriptions are subject to change in order to stay consistent with the changing needs of the Fellowship.

All employees will hired with an initial 90 day probationary period and will be evaluated near the end of that period.

1.1 Personnel Procedures

Article VIII, Section B of the By-Laws of the Miami Valley Unitarian Universalist Fellowship (MVUUF) make the Personnel Committee “responsible for staff salary recommendations, personnel counseling, and establishment and monitoring of staff contracts.” In addition, the Personnel Committee has been charged with setting up procedures for hiring and annual performance review processes. Those procedures are incorporated in the following MVUUF Personnel Policies and Procedures Manual (henceforth referred to as the Personnel Manual).

The personnel committee chair is appointed by the board. The personnel committee chair appoints additional MVUUF voting members to the committee. Other board members may serve on the Personnel Committee as needed. The personnel committee chair and all appointed members of the personnel committee are officials of MVUUF. The board vice president shall be an ex-officio member of the personnel committee, and may be appointed by the board as Personnel Committee Chair. The Personnel Committee Chair may delegate certain personnel tasks to appropriate designees. A designee may be the Office Administrator, a board member, another personnel committee member, and/or a temporary personnel consultant.

2 Job Descriptions

The Personnel Committee and its designees will be responsible for job descriptions. Current job descriptions are included as Appendix A. Job descriptions may be updated yearly by supervisor and employee in cooperation with the Program Council Representative and the Personnel Committee. Any revised job description must be submitted to the board for approval and if approved included in MVUUF Personnel Manual.

3 Hiring

Before the hiring/recruiting process begins, the job description and salary range will be reviewed and updated as necessary by the Personnel Committee. If an existing position is being refilled and the salary range remains the same, the Personnel Committee can approve. If a new position is opened or there is a major change in the description or salary range, the Board must approve.

Compensation for any new position must be appropriated in the annual budget before any recruitment activity can commence.

The goal of the Fellowship is always to seek and hire the most qualified person for every position, to comply with federal and state employment laws, and to maintain employee wage equity in accordance with UUA salary guidelines.

3.1 *Positions will be advertised in:*

1. The Fellowship Forum and on the bulletin board. Information will include minimal qualifications and names of Committee members to be contacted.
2. A local newspaper or special venues relevant to the position.

3.2 *Screening the applicants*

At least three members of the Personnel Committee shall review all applications received and, using a grading system, identify the most qualified applicants with regard to how well they meet the posted requirements.

When appropriate, members of the Personnel Committee will conduct telephone interviews to narrow the group of qualified applicants to a limited number to be invited for onsite interviews. Copies of the applications of applicants who are being invited for interviews will be provided to those who will conduct the onsite interviews.

3.3 *Interviews*

The Office Administrator will contact all potential interviewees and schedule the interviews. If the position of Office Administrator is vacant, the Personnel Committee chair or designee will complete any personnel tasks.

The interview will be conducted by the Personnel Committee and the direct supervisor for the position. Other relevant staff may be asked to take part as well.

Prior to any interview, the Chair of the Personnel Committee or designee will determine the standard interview questions that will be asked of all applicants by each Committee Member.

Interviewers may ask their own questions provided they fall within the laws of the State of Ohio.

To close the interview, the Chair of the Personnel Committee or designee will tell the applicant when she or he can expect to receive feedback regarding the selection decision, and that an employment background check will be conducted. In certain cases, the Personnel Committee may elect to do retail credit and criminal investigations on finalists; if so, the candidate will be so advised. At this time, employer contact information for references will be obtained (or verified) as well as the applicant's consent for contacting former employers (**Appendix B**). Immediately following each interview, each interviewer will prepare a summary report noting her or his

impression of the interviewee, and the “interviewing committee” will discuss the applicant and other applicants interviewed thus far.

3.4 *Background Investigation*

The Chair of the Personnel Committee or designee will investigate the employment background of applicants who are finalists for the position.

The most pertinent employment background information is normally the five years of employment history preceding the date of application.

The most meaningful employment contacts are telephone calls to the immediate supervisors of an applicant. The Human Resource Department of an applicant’s former employer will normally provide only the person’s position at separation and the dates of her or his employment (for fear of legal reprisals for disqualifying information).

The employment reference investigation form (**Appendix C**) will be used.

The applicant will be advised in advance if the present employer will be contacted regarding employment information.

3.5 *Final Employee Selection*

After reference checks are completed and deemed satisfactory, the Chair of the Personnel Committee or designee will telephone the applicant selected for employment with a verbal employment offer, contingent on approval of the MVUUF Board . Employment will be offered for a 90-day probationary period. After approval by the Board , the Chair of the Personnel Committee or designee will confirm the verbal employment offer and follow up with a typed offer letter, federal and state W4 forms, an I-9 form (**found at www.uscis.gov/files/form/i-9.pdf**), and applicable insurance forms. These forms should be returned to the Fellowship with a copy of the offer letter signed by the new employee. The employee will be given a copy of the MVUUF Personnel Manual.

The Chair of the Personnel Committee or designee will also notify all applicants who were not selected. (Do not attempt to explain to an applicant why she or he was not offered the position or rejected. Simply thank the applicant for applying.) Notification may be in the form of a letter or personal phone call. **NOTE:** Federal law requires that employment applications be retained for one year from the date of receipt. These materials will be kept in the locked personnel file cabinet.

3.5.1 *Communication to Bookkeeper and Office Administrator*

A Personnel Action Notice form (**Appendix D**) should be completed by the Office Administrator and given to the bookkeeper to enter the new employee into the Fellowship payroll and records system.

The Office Administrator will establish a personnel file folder where all employment and personnel-related forms are retained, including a copy of the Personnel Action Notice.

3.5.2 Communication with the Congregation

The Chair of the Personnel Committee or designee will announce the person selected to fill the opening to the Congregation at the next service.

The person selected to fill the opening will be announced in the next issue of the Forum, on the Bulletin Board, and on the e-mail news list.

3.5.3 Orientation and Training

Whenever possible, the employee's orientation will be conducted on her or his first day on the job. (**See Appendix E** - Employee Orientation Procedure and Employee Orientation Checklist.) The supervisor of the new employee will have primary responsibility for orientation and training, using the Position Description for the job, applicable insurance and other relevant information about the Fellowship.

The evaluation process will be explained to the employee during the orientation.

If the departing employee is available and would be an effective trainer, she or he should spend sufficient time training the new employee.

A suggested five-step training method:

1. Explain (using a current job description, the trainer explains job duties);
2. Demonstrate (trainee repeats her or his understanding of job tasks);
3. Try out (have employee perform job tasks);
4. Correct (trainer corrects any tasks not performed correctly).
5. Explain how this job relates to overall support of the Fellowship and its functions.

4 Time and Attendance

Time and attendance shall be recorded for all hourly employees. The Office Administrator will maintain all records.

The Office Administrator submits this information to the payroll service provider (currently Horizon) in the form it requires.

Salaries will be reviewed at the end of each fiscal year by the Chair of the Personnel Committee.

Salaries must be approved by the Personnel Committee and the Board in consultation with the Finance Committee, and the budget must be approved by the Congregation.

5 Benefits

Benefits will be offered on the basis of position status, i.e. whether an employee is “full time” “part time” or “partial part time” and on the basis of the organization’s ability to offer the benefit based on its resources and needs.

5.1 *Definitions*

Benefit: benefits include payroll-related insurance (FICA, Workers’ Comp, and Unemployment), optional insurance (Long Term Disability, LTD) and paid time off (vacation, sick and holiday)

Full time (FT) employee is one who works 36-40 hours/week

Part time (PT) employee is one who works 20-35 hours/week

Partial part time (PPT) employee is one who works less than 20 hours/week

5.2 *Benefits Administration*

Position status is established in the position description.

Currently three positions are eligible for benefits: Office Administrator (FT), Maintenance (PT) and LRE Director (PT).

No benefits, other than those which are payroll related, accrue to Partial Part Time positions.

Payroll related benefits are FICA, Workers Comp and Unemployment.

Employees planning vacation will request the time in writing in advance. The request will be submitted to the employee’s immediate supervisor.

Vacation and sick time shall be tracked via the time reporting system.

See the Benefits Matrix table below for list of benefits and additional information.

Compensation management re: paid time off (vacation, sick, holiday): Employees may be paid for only the standard (average) number of hours per month unless they have the written consent (paper or email; cc: bookkeeper) of their supervisor(s) to charge more. This applies whether or not the month includes any paid time off. When paid time off applies, they are considered part of the standard number of hours per month.

5.3 *Benefits Matrix*

Benefit	Full Time	Part Time
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Vacation Accrual Amount	<i>LOS</i> <i>Accrual Amt</i> 0-2 years – 12 days/year (96 hrs/year) <i>Note: LOS means</i> <i>Length of Service</i> > 2 years – 18 days/year (144 hrs/year)	<i>LOS</i> <i>Accrual Amt</i> 0-2 years – 12 days/year (48 hrs/year) > 2 years – 18 days/year (72 hrs/year)
Vacation Rollover	Maximum accrual is 18 days (144 hours) of vacation. If accrual balance reaches maximum, no additional accrual until balance falls below max. No retro accruals; i.e., may not recoup accrual for months in which not eligible due to being at max.	Maximum accrual is 18 days (72 hours) of vacation. If accrual balance reaches maximum, no additional accrual until balance falls below max. No retro accruals; i.e., may not recoup accrual for months in which not eligible due to being at max.
Accrual Process	1/12 of annual amount accrues monthly on pay day. Vacation leave may be taken once accrued.	1/12 of annual amount accrues monthly on pay day. Vacation leave may be taken once accrued.
Vacation Administration	Must be requested and approved by supervisor.	Must be requested and approved by supervisor
Long Term Disability (LTD)	Paid by MVUUF on an after-tax basis so that LTD benefits, if ever collected, are tax-exempt.	None.
Holiday Pay	7 paid holidays/year: New Year's Day, Martin Luther King Jr. Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Christmas Day	None
Holiday Pay Administration	If holiday falls on a weekend day or on a day when the employee must work, an alternate day off within the pay period shall be taken. The alternate day shall be mutually determined by the employee and the supervisor.	N/A
Sick Leave	5 days/year to use as needed. Use it or lose it as of beginning of each fiscal year.	N/A
Contribution to Pension ¹	8.0% of base pay	8.0% of base pay

FICA, Worker's Comp and Unemployment	Mandated	Mandated
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¹Employees must complete one full year of employment before eligibility for pension contribution benefit begins.

5.4 Health Care Reimbursement Account Policy

MVUUF values the health and well-being of all staff, and makes every effort to support and encourage good health through prevention and early treatment – to the extent that the Fellowship is financially able. MVUUF encourages all eligible staff to obtain health insurance if possible with the funds MVUUF makes available. When the cost of insurance is not affordable with the funds available, or if health insurance is provided by another source, MVUUF will provide a health care reimbursement account. This account is not intended to be a substitute for health insurance, nor is it considered a guarantee of health care expenses that go beyond the funds available in this account.

All full-time and part-time, non-contractual employees, defined elsewhere in this policy manual, are eligible for a health care reimbursement account. The amount available for each employee shall be in the Fellowship's annual budget. Each employee's account will be credited at the end of each pay period and funds may not be spent until they are accrued unless specifically approved by the employee's supervisor and the treasurer. Funds not used in the MVUUF fiscal year will not carry over to the next year.

The account will reimburse the employee for the cost of health insurance premiums, and/or out of pocket health care expenses. Health care expenses include: standard medical office visits, diagnostic tests, prescription drugs, vision and dental expenses. The account may be used to reimburse these expenses for the employee and their immediate family (spouse, domestic partner, or minor children). Funds may not be used for expenses that have been or will be reimbursed by a third party. These reimbursement accounts do not fall under the IRS description of business expenses and will be reported as taxable income.

Reimbursement will be provided to the employee only with receipts that reflect the name of the employee or family members, the service provided (in general terms) and the amount of the expense. Employees will attach health care receipts to a form for reimbursement and provide it to their supervisor for review. After the supervisor reviews and approves the request, the receipts will be locked in a confidential file separate from the personnel record, and maintained by the supervisor and/or the office administrator. As with all personnel issues, this information is confidential. A good faith effort will be made to maintain the employee's confidentiality, but confidentiality cannot be completely guaranteed.

The office administrator and each employee will monitor the balance of the account. The dollar amount budgeted per employee will not be exceeded.

6 Leave of Absence (Approved 2/18/10)

Leaves of absence are made available in a sincere attempt to recognize and meet the needs of paid staff. However, the granting of paid leave must also take into account the best interests of MVUUF, including but not limited to church calendar and financial situation. Negotiations will consider the availability of volunteers, the church budget, and the reasonable expectation of a prompt return to previous status. Leaves of absence for non-ordained staff are approved and administered by the Personnel Committee and the Board of Trustees.

6.1 Policy

Employees may request a leave of absence with the understanding that the employee intends to return to work for the Fellowship at the conclusion of the leave of absence.

A leave of absence for longer than six weeks precludes the Fellowship from assuring the employee of a return to the position held at the time the leave of absence began. However, should a leave of absence continue beyond a six week period, every effort will be made to find a position at the Fellowship for which the employee is qualified. An employee not returning to work the day following the conclusion of an approved leave of absence may be terminated from employment.

Only with Board approval may an employee be employed by another church, Fellowship, or organization while on leave of absence. Failure to secure approval will result in termination of employment.

6.2 Types of Leave of Absence

Paid

Medical and Family: An absence of up to six weeks as approved. Such leave may be authorized for a seriously ill employee (medical leave) or to care for a spouse, partner, child or parent who is seriously ill (family leave).

Parental: An absence of up to six weeks as approved. Such leave may be authorized for the birth, adoption, or guardianship of a child by the employee.

Bereavement: An absence of up to one week for the death of a spouse, partner, or child. An absence of up to three days for other family members.

Wages and Benefits

Employees seeking a paid leave of absence for any reason may receive 100% of their wage for the first two weeks of leave and no less than 60% for the remaining four weeks. Employees will continue to accrue benefits throughout the leave.

Full-time employees may negotiate a part-time schedule at full wage and benefits for up to six weeks. A physician must approve the reduced hours in the event of medical leave.

Unpaid

Personal: An absence of up to one month as approved.

Military: Absences of two weeks for the National Guard summer camp or for an extended period of time of National Guard or Reserve members in the event of a national emergency as declared by the President of the United States.

6.2.1 Procedure

In the event of a medical or family leave of absence, the employee is required to prove the supervisor with a written statement from the doctor as to the reason for the leave of absence request and a projected date for returning to work. In the event of parental leave of absence, the employee will provide a letter detailing the leave request.

A Personnel Change Notice form should be completed by the supervisor of the employee and given to the Personnel Committee for approval PRIOR to communicating approval of such leave to the employee.

It is the responsibility of the employee on leave to contact the supervisor in writing to request reinstatement of employment with the anticipated date of return to work. In the event of medical leave, the employee's doctor is required to provide the employee's supervisor with a written statement indicating a date when the employee may safely resume work.

7 Performance Management (Approved 12/07 by Personnel Committee)

For new employees, performance reviews will be conducted prior to the end of the initial 90 day probationary period. Thereafter, performance reviews for most MVUUF employees will be done annually, on or around the hire date anniversary.

The current or new approved job description will be the basis for employee reviews.

7.1 *Developing Annual Staff Goals*

Each staff member will develop annual goals based on the job description and the objectives of the Fellowship. (See Appendix F -Sample Job Performance Goals).

The Board will approve and/or negotiate changes to the Minister's goals.

The Minister and/or supervisor will meet individually with other staff persons to review the goals they have submitted.

7.2 Performance Evaluations

The performance review will be performed by the direct supervisor of the employee, with feedback gathered from committee members, congregation members, and program council representative. An evaluation process will be developed for each job description, using a format like the Performance Factors Evaluation System (**Appendix G**), or some other method approved by the Personnel Committee.

The performance review will cover three areas of performance: performance of area of responsibility outlined by job description; progress towards goals of the program that the employee works in, and progress towards personal /professional goals developed by the employee and the supervisor. These goals should be developed and communicated at least six months prior to the review. (See **Appendix H** - Conducting Effective Performance Evaluations).

For goals of the program, the employee working in that area will submit their evaluation both of the program as a whole and their understanding of their contribution towards these goals. The supervisor will gather feedback from program appropriate council representative, committee members and congregation members about the progress toward goals of the program and the employee's contribution and will share this feedback in a constructive manner during the review, using the employee's own evaluation as a valuable input to this overall evaluation.

The employee will also submit their own evaluation of their progress toward their personal and professional goals. The direct supervisor will provide an evaluation of the employee's progress toward these goals, using the employee's self evaluation as input and feedback gathered from members.

During the performance review, new personal/professional goals will be developed. The goals for the program will be developed by the supervisor and employee.

The most advantageous way of providing evidence of how an employee performed would be with measureable results such as increased attendance. However, it is understood that most performance is a subjective matter that is perceived differently by different perspectives. It is understood that employee and supervisor may have differing views on performance and may need to ask a Personnel Committee member to help them sort through their differing views.

7.3 Job Performance Warning

If at any time after the probationary period but prior to the next scheduled performance evaluation, the supervisor determines that an employee's job performance is "Unsatisfactory" or "Marginal," the supervisor (in consultation with the Personnel Committee) will give the employee a formal written warning that will become a part of the employee's personnel file.

7.4 Discipline

If a complaint is filed concerning ordained or unordained staff, the Personnel Committee will investigate the complaint. The Committee will counsel with the staff member, providing a written recommendation for future action. If warranted, the Committee will also place a written

record of the incident and the Committee's actions in the staff member's personnel file. The complainant will be informed in writing of the Personnel Committee's action.

7.5 *Employee Concerns*

Every employee will be treated fairly in matters of pay, benefits, promotions, working conditions, and the resolution of employment-related concerns.

If an employee has a concern, she/he should discuss it with the immediate supervisor. If the matter is not resolved to the employee's satisfaction by the immediate supervisor, the employee has the right to speak with the Minister or meet confidentially with the Chair of the Personnel Committee.

Appendix A – Job Descriptions

Use of Job Descriptions

Job descriptions alone are insufficient to provide individuals with day to day direction in their positions or to express annual performance expectations. Interaction between employee and supervisor achieves those goals. Job descriptions provide a general indication of what is expected for the purpose of setting salaries and providing guidance for searches.

Job descriptions should express the expectations of the supervisory team. Position content and job descriptions can get out of alignment as time goes by. Job descriptions should be reviewed annually against position content and organizational need to ensure that the document is current and aligned with the needs of the organization.

Job descriptions should also be reviewed whenever a new incumbent is sought for a position. This should take place before any other phase of the search commences.

When job descriptions change significantly in scope and expectations, the changes are submitted to the Personnel Committee. The committee members review the changes with the supervisor and incumbent as needed and send the updated job description to the Board for approval. Minor changes may be made by the supervisor in concert with the incumbent and with the approval of the Personnel Committee.

Title: ***Bookkeeper***

Department: Administration

Status: Partial part time

Prepared by: Scott Leonard

Date: 12/8/05

Committees responsible to: Finance Committee

OVERVIEW

The Bookkeeper completes bookkeeping-oriented tasks for the Fellowship.

DUTIES

- Accurately and in a timely fashion maintain the financial records of the Fellowship. This includes, but is not limited to the “Specific Monthly Tasks” listed on the attached page.
- Assist with internal or independent financial audits as necessary.
- Recommend financial process improvements to the Administrator, Finance Committee Chair, and/or Treasurer. Improvements include any changes to make financial processes faster, more accurate, more auditable, or more resistant to fraud and data loss. Recommend when financial software or computer upgrades should be made. Implement improvements and upgrades (if approved) upon approval.
- Complete other bookkeeping-oriented tasks as assigned by the Treasurer or Finance Committee Chair.
- Coordinate the Bookkeeper’s tasks and schedules with the Administrator, as necessary.
- Maintain accurate records of working time spent each week. Report time worked to the Administrator in time for payroll submissions.
- Provide the Administrator, Treasurer, and Finance Committee with current phone and email contact information for the Bookkeeper. Make best effort to respond to calls and emails within 24 hours. Notify by phone, voicemail, or email the Administrator, Treasurer, and Finance Committee Chair in advance (if possible) when there will be extended periods (1 week or more) during which the Bookkeeper will be unavailable.
- Follow appropriate security procedures with regard to computer passwords and building keys. Provide the President and Vice President with current lists of computer passwords that are under the Bookkeeper’s control.
- Maintain a working knowledge of standard bookkeeping rules and principles. Adhere to those rules and principles, and promptly notify the Treasurer, Finance Committee Chair and President of the Fellowship if Fellowship bylaws, policies, procedures, or specific directions given to the Bookkeeper would violate standard bookkeeping rules and principles.
- Learn in a timely manner to use new financial software or bookkeeping processes as required. Perform data entry as needed to update computer systems or migrate to new systems.
- Abide by the UUA Code of Ethics in addition to codes of ethics appropriate for bookkeeping professionals. Consistently conduct themselves in accord with, and in support of, the Fellowship’s purposes and principles.
- Other duties as assigned.

SPECIFIC MONTHLY TASKS

- Specific monthly tasks for the Bookkeeper and an estimate of the time requirements for each are as follows. The total estimated time required for regular monthly tasks is 20 hours per month. The Bookkeeper shall record and be paid for his or her actual hours worked each month.

Accounts Payable (Estimated 1.5 hours / week)

- Enter new vendors as needed
- Enter payables using requisition vouchers prepared by Administrator
- Print checks, attach to voucher and put in “Checks to Be Signed” folder.
- Accounts Receivable (Estimated 1 hour/week)
- Enter cash receipts using weekly report prepared by Administrator
- Payroll (Estimated 1 hour/month)
- Record monthly payroll
- Reconcile Powerchurch report to Horizon report
- Bank Reconciliation for National City (Estimated 1.5 hours/month)
- Enter direct debits from National City account
- Reconcile to General Ledger (all)
- General Ledger (Estimated 2 hours/month)
- Maintain chart of accounts
- Reconcile Balance Sheet Accounts
- Cash in Bank

National City Account

- Review for any variances and make corrections as needed
- Email the preliminary Income Statement, Balance Sheet, and General Ledger (monthly data only) to the Treasurer and Finance Committee Chair in time for their review at the monthly Finance Committee meeting (Currently scheduled at 6:30PM on the 2nd Wednesday of each month.)
- Make corrections as needed.
- Run final Balance Sheet and Income Statement and resend to Treasurer and Finance Committee Chair.

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Meetings (Up to 5 hours/month)

- Attend meetings as required
- Weekly staff meetings
- Monthly Finance Committee meetings

REPORTING RELATIONSHIPS

The Bookkeeper accepts direction on financial tasks from the Treasurer and the Finance Committee Chair. The Bookkeeper’s formal reporting relationship is as described in the MVUUF Policy Manual.

QUALIFICATIONS

- The Bookkeeper shall have at least the following qualifications.

- Education and/or working experience in relevant bookkeeping processes.
- Ability to learn and become proficient in using the bookkeeping software owned by the MVUUF.
- Ability to perform all duties and monthly tasks described in this job description.

Title: **Custodian**

Department:

Status: Part Time

Prepared by:

Date:

Committees responsible to: Operations/Maintenance

OVERVIEW

The Custodian shall provide a clean, safe, and consistent environment at the MVUUF facility located at 8690 Yankee Street, Dayton, OH. The jobs in the ensuing "Itemization of Responsibilities" are to be performed in a manner consistent with the expectations of the Board and in accordance with local sanitation codes and cleaning practices. The Custodian will abide with the UUA Code of Ethics and will conduct him/herself in accordance with the Fellowship's Purposes and Principles on file at the Fellowship Office.

DUTIES

- Any tasks that the Custodian may be asked to perform that are not included in the Custodian's Itemization of Tasks will be compensated as negotiated with the Administrator and Operations Representative on a per item basis.
- The Custodian shall receive additional pay for any event requiring him/her to work additional hours above and beyond the normal custodial work schedule.
- Notify the Administrator when building usage has been unsatisfactory.
- Maintain the building according to jobs outlined on the attached Itemization of Tasks.
- Meet with the Administrator on a monthly basis to review and evaluate concerns.
- Notify the Administrator when standard building supplies are needed if such cost is over \$50.
- If the costs are under \$50, the Custodian may purchase said supplies and present a receipt to the Administrator for reimbursement.
- Establish weekly schedule of hours with the Administrator.
- Notify Administrator and/or Operations Representative if repairs and/or maintenance are needed.
- The Custodian should be alert to any building clean-up that needs to be done and perform such clean-up in a timely manner.
- Other duties as assigned.

REPORTING RELATIONSHIPS

The Custodian will report to and take direction from the Fellowship's Administrator. Any issues that cannot be resolved between the Custodian and Administrator must be brought to the attention of the Operations Representative. If the Operations Representative is unable to resolve the issue it is to be sent in writing to the Personnel Committee for review and resolution.

QUALIFICATIONS

Reliable and have a track record of steady work.

<u>MVUUF CUSTODIAN ITEMIZATION OF RESPONSIBILITIES</u>								
Note: The frequency of performing the following job duties is be used as only a guideline. It may be updated as needed by the Administrator, Operations Representative, and Custodian.								
Date Prepared: August 17, 2005 Job Title: Custodian								
Reports to: MVUUF Administrator								
	As/If Needed	Day 1	Day 2	Day 3	W	M	Semi	Y
<u>Building Exterior:</u>								
Pick up & dispose of loose trash	X	X	X	X				
Windows - wash & clean	X						X	
<u>Building Interior:</u>								
Replace light bulbs throughout building	X							
Wastebaskets - empty all	X	X	X	X				
Entryways - windows - clean	X							
Entryway mats - clean	X							
<u>Hallways & Gathering Space:</u>								
Sweep	X	X	X	X				
Wet-Mop - 2 times per week	X	X		X				
Wax and Buff - strip and re-wax	X							X
Walls-clean off scuff marks and handprints	X							
Glass doors and windows-clean off prints	X							
Wastebaskets - empty	X	X	X	X				
<u>Restrooms:</u>								
Floors - mop	X	X		X				
Sinks - clean	X	X	X	X				
Toilets - clean	X	X	X	X				
Mirrors - clean	X	X	X	X				
Replace: toilet paper, paper towels, liquid soap	X	X	X	X				
Walls & Stall Walls - clean	X							X
<u>Offices, Class Rooms, Library</u>								
Dust	X				X			
Vacuum	X				X			
Clean doors, walls, windows of scuff marks & handprints	X				X			

Empty wastebaskets	X				X			
Carpet - shampoo	X						X	
<u>Sanctuary:</u>								
Vacuum	X				X			
Dust everything (including window sills)					X			
Move and/or re-arrange chairs as requested	X							
Cobwebs - remove					X			
Choir Risers - dust and straighten					X			
<u>Kitchen & Coffee Area:</u>								
Wet Mop	X				X			
Dust	X				X			
Windows - clean	X				X			
Trash - empty all trash cans	X				X			
Door mat - vacuum					X			
Note: Custodian is not responsible for the cleaning kitchen sinks, counters and appliances or replacing supplies.								

Title: **Administrator**

Department: Administration

Prepared by: Amy Russell

Committees responsible to: Board

Status: Full time

Date: February 2009

OVERVIEW

The administrator is responsible for general office work, the weekly order of service, and certain aspects of building use. The administrator serves as secretary for the membership and pledge functions of the Fellowship. The administrator must work closely with the Minister, staff, Board, Program Council, and committees in the achievement of the goals set forth by the Congregation, the Board, and the Minister.

Because the administrator is often the first contact a visitor has with the Fellowship, he/she must be familiar with and supportive of the policies and practices of the Fellowship and the Unitarian Universalist Association Principles and Purposes.

DUTIES

General Office Work

- Answer telephone and program answering machine
- Assist committees.
- Maintain and track all address lists (membership, Forum, and UU World subscription).
- Receive and distribute mail.
- Inventory and purchase office supplies, and coffee.
- Oversee operation, maintenance, and repair of office equipment.
- Assist Planned Parenthood book drop.
- Supply annual and semi-annual reports
- Assist Personnel Committee with ensuring that any new hire receives appropriate paperwork and that these forms are on file in the Fellowship office.
- Schedule Minister's appointments as needed
- Add sermons to web site.
- Create brochures and flyers as needed Order of Service (Bulletins)
- Receive information, create file, coordinate printing. Monthly Newsletter (Forum)
- Receive information, create email and print versions, send out.

Building

- Schedule use of Fellowship facilities and handle contracts and arrangements in accordance with Fellowship policy.
- Welcome visitors and conduct tours of building.
- Be responsible for building keys.
- Coordinate custodial arrangements with minister.
- Coordinate arrangements for memorial services and weddings as needed.

Membership

- Keep Fellowship directory current.
- Mail information packets to guests and interested persons.
- Maintain and track membership lists (members, associate members, friends, and visitors).

- Send letter to all guests, new members, and those who resign in timely fashion.
- Keep Membership Committee updated as to new members including addresses and telephone numbers, as well as resignations.
- Coordinate with the Caring and Sharing Committee.
- Records
- Keep Treasurer, Finance Committee, and Canvas Committee informed of new members and pledge status of all pledging units.
- Certify membership with UUA.
- Maintain records of pledge receipts.

Finance

- Prepare payroll information
- Process and send payment to vendors.
- Send acknowledgments and thank you notes for memorial gifts.
- Assist bookkeeper.
- Maintain individual contribution records, prepare and mail quarterly and annual contribution statements, record weekly deposits in Powerchurch.
- The administrator will also be responsible for writing checks and running the PowerChurch reports to generate the balance sheet, income statement, and cash report used by the Fellowship to make appropriate financial decisions.
- Other duties as assigned

REPORTING RELATIONSHIPS

Position reports to: Minster

Position supervises: office volunteers and provides daily work direction to the custodian.

QUALIFICATIONS

Education: 2 year degree or equivalent experience

Experience: A minimum of 2 years experience working in a similar environment with similar accountabilities

COMPETENCIES

- basic knowledge of word processing, spreadsheet, and data base execution
- skill in oral and written communication
- self-motivating, able to work with little direct supervision
- ability to plan, implement and evaluate
- awareness of organizational priorities and need of individual
- proficiency in organizing and maintaining records and schedules
- time-management skills
- ability to work under time pressures and with a wide variety of people detail oriented
- willingness to work in a cooperative team environment
- good working understanding of the Fellowship, including an appreciation for the need and use of the democratic and group processes.

Title: ***Director of Religious Education (DRE)***

Department:

Status:

Prepared by:

Date:

Committees Responsible to:

ACCOUNTABILITY

The DRE reports to the minister and collaborates with the YRE Committee, Teaching Team, and Lifespan Religious Education Representative (LRE Rep). The LRE Rep and Minister, in conjunction with the personnel committee, will work together with the DRE on regular performance review/ management.

SUPERVISES

RE Assistant, Nursery Care Provider, Child Care Provider (YRE Staff), and teachers and volunteers.

OVERVIEW

The purpose of the DRE is to provide leadership and guidance to MVUUF regarding religious education for children, and youth through age 20. The DRE collaborates with the volunteer teaching team, LRE Rep, the appropriate RE committees, and the Fellowship staff to accomplish strategic planning for religious education and provides ongoing coordination of the RE program. The DRE fulfills the responsibilities of the position in a way that demonstrates care and concern for the members of the Fellowship.

DUTIES

On-Going Responsibilities

- (in collaboration with the LRE Rep, YRE volunteers and YRE support staff)
- Be present and available up to 5 hours on Sunday, actively engaged in the morning activities of YRE. (One Sunday off per month is allowable).
- Welcome, provide information to and follow up with new and prospective YRE participants and families
- Plan, organize, prioritize, and provide ongoing coordination of the YRE program
- Evaluate and respond to children's needs for appropriate learning environments, curricula, safety and care
- Implement YRE policies
- Foster a sense of community, the healthy functioning of the congregation and a spirit of cooperation among its members and staff
- Create and maintain a learning environment that welcomes and nurtures participants
- Provide or arrange for monthly Children's Chapel and Youth Worship
- Assure snacks are available to classes who request them
- Perform other duties or tasks as assigned

Periodic Responsibilities

- (in collaboration with the LRE Rep, YRE volunteers and YRE support staff)
- Select and implement a curricula for children and youth in accordance with Board/LRE Representative expectations in collaboration with the YRE Committee

- Plan and implement programming and special events in collaboration with the YRE Committee, teaching team, and other volunteers and staff
- Coordinate rite of passage ceremonies for children and youth with the Minister
- Recruit, train and support volunteer teachers and leaders for YRE programs and activities
- Review YRE policies and recommend changes to the LRE Representative.
- Participate in strategic program review and planning for the growth, development and ongoing effectiveness of the YRE program

Administration

Budget

- Collaborate with the LRE Rep to develop and recommend an appropriate budget for the YRE program annually.
- Monitor and work within approved budget

Communication

- Publicize program options in bulletins and Forum articles
- Prepare and publish YRE schedule of programs and prospectus yearly
- Assure maintenance of YRE bulletin board
- Records
- Maintain records regarding budget, professional growth, student registration, class roster and family contact information, attendance, background/safety screenings and health information for children

Volunteer and RE staff Support

- Recruit, train, and provide feedback and support as needed for volunteers
- Maintain an appropriate level of supplies and equipment in organized, safe, and clean manner
- Maintain a library for resource materials
- Assure that curricula and requested materials are available for teachers/volunteers
- Recruit, train and supervise a YRE Assistant, Nursery, and Childcare Providers
- Ensure regular teacher recognition

Board / Committee Work

- Participate in meetings of YRE Committee, ensure minutes are completed and submitted
- Attend other committee and Board meetings as requested
- Study and Self-Development
- Maintain own spiritual, physical and emotional well-being
- Participate in DRE training opportunities (e.g., district, regional, independent study)
- Maintain District and denominational contacts and connectedness as a means of service and nurturing personal growth
- Abide by the LREDA Code of Ethics and the MVUUF Code of Ethics for Ministry with Youth and the policies of MVUUF
- Experience, Knowledge, Skills, and abilities:
- Enjoyment of and desire to work with children and youth
- Understanding of developmental norms and needs for different ages/stages of children and youth

- Ability to plan, organize, prioritize, and provide ongoing coordination of the YRE program (requires analytical thinking, problem-solving, attention to detail)
- Ability to work in a team and independently, and with minimal supervision
- Ability to build and maintain a support network within the UU community within and outside of MVUUF
- Ability to develop and maintain positive and professional rapport with a diverse group of people with various religious orientations, of all ages, including adults/parents
- Bachelor's degree in religion, education, or other related field (preferred) or experience in related work
- Strong interpersonal skills, including relationship-building, written and oral communication skills
- Be in sympathy with the mission, principles, and tenets of the MVUUF and the larger UUA.

Title: ***Religious Education Assistant (REA)***

Department:

Status:

Prepared by:

Date:

Committees responsible to:

OVERVIEW

The Religious Education Assistant (REA) assists the Director of Religious Education (DRE) and the RE staff in planning and implementing RE programs for children and youth. The duties listed below are to be performed in a manner consistent with the Board and DRE's expectations, in accordance with the direction of the RE mission and goals, and in a way that demonstrates care and concern for all members of the Fellowship and their religious education needs.

DUTIES

- Assist the DRE and volunteers with RE activities during Sunday services and other programs as agreed. (See Duties for Sunday Morning listed-attached)
- Provide assigned RE clerical help in the RE office.
- Comply with the UUA Code of Ethics and the Ministry of Religious Education Code of Ethics on file at the Fellowship.
- Be visible and active in the YRE wing, monitoring all YRE areas for safety and respond to needs
- Assure neatness and cleanliness in the Prep Room and YRE classrooms
- Assist DRE in recruiting volunteers for various YRE programming
- Provide program support for up to two hours (average) during the week, which may include such tasks as making phone calls or clerical work.

REPORTING RELATIONSHIPS

Position reports to: DRE

Position supervises: No supervisory responsibilities

QUALIFICATIONS

- Strong interpersonal, teamwork, and relationship-building skills
- Successful track record in coordinating volunteer activities, preferably in a liberal religious or social service setting
- Be in sympathy with the mission, principles, and tenets of the Miami Valley Unitarian Universalist Fellowship
- Responsiveness to the needs and concerns of participants and, where relevant, parents of MVUUF
- Strong time management skills (e.g., completing work in a timely manner, making effective use of time, etc.).

TITLE: Youth Advisor Staff

Department:

Status:

Prepared by:

Date:

Committees responsible to:

OVERVIEW

The Youth Advisor plans and coordinates the youth groups activities for the YRE program. The Youth Advisor is involved and oversees the senior high youth group, junior high youth group, youth leadership committee as well as two CONs per year. The duties listed below are to be performed in a manner consistent with the Board and DRE's expectations, in accordance with the direction of the RE strategies and goals, and in a way that demonstrates care and concern for all members of the Fellowship and their religious education needs.

DUTIES

- Plans for and facilitates both junior high and senior high youth groups
- Facilitates Youth leadership committee by providing youth with guidance as well as attending their committee meetings
- Attends one junior high conference (CON) and one senior high conference each year
- Communicates with youths' families about conferences as well as coordinating permission slips and volunteer drivers to and from CONs
- Coordinate and works with volunteers in to help with junior high, senior high, and Youth Group Committee
- Comply with the UUA Code of Ethics and the Ministry of Religious Education Code of Ethics on file at the Fellowship.
- Monitor all YRE areas for safety and respond to needs during youth meetings
- Assist DRE in recruiting volunteers for all youth groups

REPORTING RELATIONSHIPS

Position reports to: DRE

Position supervises: volunteers who work directly with youth groups

QUALIFICATIONS

- Experience in working with youth
- Strong interpersonal, teamwork, and relationship-building skills
- Successful track record in coordinating volunteer activities, preferably in a liberal religious or social service setting
- Be in sympathy with the mission, principles, and tenets of the Miami Valley Unitarian Universalist Fellowship
- Responsiveness to the needs and concerns of participants and, where relevant, parents of MVUUF
- Strong time management skills (e.g., completing work in a timely manner, making effective use of time, etc.)

Title: ***Nursery Caregiver***

Department:

Status:

Prepared by:

Date:

Committees responsible to:

OVERVIEW

The Childcare Provider provides safe, nurturing, and consistent care for children ages 0-12 at the fellowship during Adult Religious Education and ages 0-4 during Sunday services. These hours are 9:15 a.m.-12:15 p.m. on Sunday. Other times may be arranged by mutual agreement with the DRE as needed.

DUTIES

- Supervise all children left in their care at the Fellowship, providing a safe and nurturing environment.
- Monitor conditions (e.g. playground, classroom) for safety and cleanliness.
- Maintain records (i.e. attendance, visitor registration) as requested.
- Other duties as assigned by the Director of Religious Education (DRE).

REPORTING RELATIONSHIPS

Position reports to: DRE

QUALIFICATIONS

- Enjoyment of and desire to work with children and youth
- Ability to work in a team and independently, and with minimal supervision
- Strong interpersonal skills, including responsiveness to the needs and concerns of participants and parents
- Ability to manage concurrent multiple priorities (requires analytical thinking, problem-solving, and attention to detail)
- Ability to provide effective feedback to the DRE.
- In sympathy with the mission, principles, and tenets of the Miami Valley Unitarian Universalist Fellowship

Title: ***Choir Accompanist (CA)***

Department: Music

Status: Partial Part Time

Prepared by:

Date:

Committees responsible to:

OVERVIEW

The CA is responsible for accompanying the choir at rehearsals and in performance.

DUTIES

- Accompany choir at all weekly and other special rehearsals.
- Accompany the choir in performances.
- Perform other appropriate tasks assigned by the Choir Director or Director of Music.
- Report to and take direction from the Choir Director.
- Comply with the UUA Code of Ethics on file at the Fellowship, consistently conducting him/herself in accordance with and support of the Fellowship's Purposes and Principles on file at the Fellowship.

REPORTING RELATIONSHIPS

Position reports to: Choir director (and Music director, when incumbent is in place)

Position supervises: No supervisory responsibilities

QUALIFICATIONS

- Experience playing piano for choral groups
- Ability to work effectively with people
- Demonstrate teamwork

Title: **Choir Director (CD)**

Department:

Status: Partial part time

Prepared by:

Date:

Committees responsible to:

OVERVIEW

The Choir Director is responsible for directing and rehearsing the choir throughout the year and arranging for piano accompaniment for Sunday services. The Choir Director is an integral part of the ministry of the Fellowship, stimulating interest in music as part of the life of the entire congregation. The Choir Director's behavior and attitude shall reflect the caring nature of ministry and a respect for the Purposes and Principles of the Unitarian Universalist Association.

DUTIES

- Coordinate with the Music Director (when incumbent in place) and Music Program Representative a choral program that stimulates and challenges the congregation and conveys the ideals and principles of Unitarian Universalism.
- Provide diverse, imaginative music of high quality for congregational worship services, while maintaining freedom of musical expression. This includes planning choral music appropriate for the program theme and season of the year.
- Assist the Music Director (when incumbent in place) and program representative in recruiting and developing children and youth music programs.
- Rehearse as necessary choirs, soloists, and other musicians participating in Sunday morning services.
- Schedule regular choir performances in connection with the program themes.
- Assist in recruiting special music for Sunday programs.
- Hire and supervise the Choir Accompanist.
- Recruit members for the choir and cultivate musical talent with people of all ages in the Fellowship.
- Develop musical programming that conveys the ideals and principles of Miami Valley Unitarian Universalism.
- Plan details of music offerings in time to be included in the Sunday bulletin and monthly Forum.
- Coordinate with the Music Director the Fellowship's music library.
- Other duties as assigned.

REPORTING RELATIONSHIPS

Position Reports to the Director of Music or Minister

QUALIFICATIONS

- Experience directing choral groups and some musical training preferred.
- Ability to work well with diverse personalities, thereby encouraging participation and retention.

Title: **Director of Music**

Department: Administration

Status: Partial Part Time

Prepared by:

Date:

Committees responsible to: Music, Worship

OVERVIEW

The DOM is an integral part of the ministry of the Fellowship, stimulating interest in music as part of the life of the entire congregation. The DOM is a resource for a variety of types of music for Sunday morning services, alternative services, and special music programs. The DOM works closely with the minister, the music and worship committees, and the Fellowship staff in planning and designing worship services and programs. The behavior and attitude of the DOM shall reflect the caring nature of ministry and a respect for the Purposes and Principles of the Unitarian Universalist Association.

DUTIES

- Take charge of the musical life of the congregation. Develop a music program that stimulates and challenges the congregation and conveys the ideals and principles of Unitarian Universalism.
- Coordinate the music for Sunday worship services.
- Coordinate the Saturday Celebration services September through May.
- Supervise the Fellowship music employees.
- Arrange for the development of the children and youth music programs.
- Coordinate all phases of the music for the Fellowship with the worship committee, the Choir Director, and the Minister to provide diverse, imaginative music of high quality for congregational worship services. This includes providing music appropriate to the theme of the Sunday morning and alternative services as well as planning choral, instrumental, and vocal music appropriate to the program theme and season of the year.
- Plan details of music in time to be included in the Forum, program bulletins, and other Fellowship publications.
- Arrange for musical talent within and without the congregation to perform at Sunday services, Saturday Celebrations, and special musical programs.
- Submit annual budget requests to the finance or other appropriate committees. Maintain spending records.
- Attend regularly scheduled staff meetings as personal schedule permits.
- Work with the Minister and other musicians to provide music at weddings, memorial services, and other private services when requested.
- Supervise the maintenance of the congregation's musical instruments and music library.
- Cultivate musical talent with people of all ages in the Fellowship.
- Other duties as assigned.

REPORTING RELATIONSHIPS

Position reports to Minister

Choir director and choir accompanist report to Music Director

QUALIFICATIONS

- Experience in working with ministers and other to coordinate music with services
- Contacts in the community that lead to enriching the music options for the congregation
- Good organizational skills and the ability to work to and meet deadlines
- The ability to work well with a variety of people

Appendix B – Employer Reference Inquiry

Church Name

Street Address/Box No.

City/State/Zip

Fax No.

The below former employee, by signing this form, has given you permission to answer the following questions candidly:

Former Employee:

Given/Maiden Name(s):

Signature:

Social Security #:

Date:

1. Dates of Employment:

2. Position at Separation:

3. Salary at Separation:

4. Overall Work Performance Evaluation During Last Year of Employment

5. Eligibility for reemployment: Eligible Ineligible (Circle one).

If “Ineligible” please state reason (Please Use Back of Form if Needed):

Supervisor’s Name (Please Print)

Company/Institution Address

Appendix C– Employment Reference Investigation

Applicant:

SSN:

Co./Institution Contacted:

Person/Dept.:

Phone No.:

Date:

By:

Conclusion (Favorable or Unfavorable):

QUESTIONS

1. Dates of Employment:
2. Position at Separation?
3. Salary at Separation?
4. Work-Related Strengths?
5. Need for Improvement Areas/Weaknesses?
6. Leadership Ability/Potential?
7. Relationship with Subordinates?
8. Relationship with Supervisor?
9. Attitude towards Position and Company?
10. Overall Work Performance Evaluation During Past Year (Based on Performance Evaluations)?
11. Eligibility for rehire?: Eligible Ineligible (Circle One). If “Ineligible” please state reason.
12. Other Questions/Comments?

Appendix D– Personnel Action Notice

EMPLOYEE DATA	1) Name: Last, First & Middle	2) Social Sec. No.	3) Effective Date/Mo.-Day-Yr.	4) Home Phone No.
EMPLOYEE DATA	5) Street Address or Box No. 6) City 7) State 8) Zip Code 9) Birth Date	6) City	7) State 8) Zip Code	9) Birth Date
EMPLOYEE DATA	10) Employment Date	11) Job Title	12) Salary Grade	13A) Job Classification: Non-Ordained () Ordained ()
WAGE CHANGE	13B) Job Classification: Full Time () Part Time () Seasonal ()	14A) Wage: To \$ From \$ 14B) Paid Weekly () Bi-Weekly () Semi-Monthly () Monthly () Bi-Monthly ()	15A) Next Performance Evaluation Date: 15B) Next Wage Review Date	16A) REQUIRED EEOC DATA Caucasian () African Amer. () Asian () Hispanic () Native Amer. () Other _____ 16B) Female () Male () 16C) Unmarried () Married ()
JOB STATUS CHANGE	17A) Classification () Job Title () Promotion () Demotion () Other _____	17B) To From	18A) Job Classification: Non-Ordained () Ordained () 18B) Full Time () Part Time () Seasonal ()	19) Salary Grade: To From
ABSENCE	20A) Leave: Paid Vacation () Unpaid Vacation () Paid Family () Unpaid Family () Paid Illness () Unpaid Illness ()	20B) Leave of Absence Illness/Disability () Maternity () Military () Other _____	20C) Funeral Leave Paid () Unpaid ()	21) Dates: From To
TERMINATION	22) Voluntary ()	23) Last Day	24A	24B) No. of

	Involuntary () Reduction in Staff ()	Worked:	Severance Pay: Yes () No ()	Days/Dollar Amount
APPROVAL / COMMENTS	25. Sr. Pastor _____ Date ____ Supervisor _____ Date ____ Personnel Liaison/ Committee Chair _____ Date ____	26) Comments		

Appendix E – Employee Orientation Procedure

Employment Information

Position: _____

Employment Date: _____

Starting Salary: _____

Work Schedule _____

First Perf. Eval. Date: _____

SSN _____

Work/Alien Permit # (if applicable): _____

Orientation Record:

Greeted by supervisor

Completed Employment forms:

W-4: Federal and State

I-9: Department of Immigration

State Work Permit for minors

Employment application (if not completed)

Insurance applications (if eligible)

Tour of church and work area; introduction

to coworkers and review of work schedule

Explain church rules (working

from the Employee Manual with employee)

Three-month training period

Importance of attendance and punctuality

Phone supervisor when ill or delayed

Parking

Personal appearance

Performance evaluations and wage
increases

Staff meeting: day and time and importance
of attending

Explain Fair Treatment policy for dealing
with concerns

Other information/Answer questions

Work Safety and Fire Prevention:

Contact supervisor in case of accident

Location of first aid kit

Slippery floors

Objects on floor

Lifting objects

Proper shoes (Housekeeping

employees)10. On the job training:

Review of work materials and schedule

Review of job description

Introduction to trainer who will explain job

Employee observes job tasks

Employee performs job tasks

Trainer corrects employee if needed

End of day review with employee by
supervisor

How did your day go?

Questions?

Orientation completed:

Date

Supervisor

Employee

Appendix F – Sample Job Performance Goals

Examples of goals for a program area:

Increase participation by members in area through recruitment and promotion of programs

Improve internal communication about programs in area

Examples of personal/professional goals for an employee:

Improve ability to communicate about a program

Improve timeliness of deliverables for program

Provide a standard of professionalism that speaks to MVUUF's desire to serve congregants with excellence

Appendix G – Sample Performance Evaluation and Improvement Plan

Non-ordained Staff

Employee:

Position:

Overall Rating: Outstanding Excellent Good
 Too Early to Rate Marginal Unsatisfactory

Evaluator:

Evaluation Date:

Next Evaluation Date:

Performance Factor	O	E	G	TETR	M	U	Improvement Plans
Personal Attendance							
Attitude Toward Position							
Working Relationship w/ Others							
Working Relationship w/ Super.							
Job Knowledge							
Quality of Work							
Quantity of Work							
Initiative							
Problem-Solving							
Cost Control							
Use of Time							
Other							

Appendix H – Conducting Effective Performance Evaluations

Step 1: Give the persons you supervise the performance factors or performance goals by which she or he will be evaluated at the time you adopt the performance evaluation process. It is also good practice to discuss these factors or goals during the orientation of a new employee.

Step 2: Tell the staff member when the evaluation will take place so that she or he can prepare for it. Select a place for the evaluation that is private, with no interruptions, but that is also informal (if practical, do not sit across a desk from your subordinate). The climate for your feedback session is as important as the evaluation itself.

Step 3: Evaluate each factor or goal and then write out a narrative statement summarizing that evaluation. The performance evaluation form is designed so that the evaluation can be done on page one and the narrative statement summarizing that evaluation can be written on page two. For a first time a performance evaluation is implemented, for each factor or goal, use the categories of *Excellent*, *Good*, *Marginal*, *Unsatisfactory*, or *Too Early to Rate*. The category of *Outstanding* should not be added to the evaluation form until after the performance evaluation process has been in place for one or two years in order for the pastor and other supervisors not experienced with administering performance evaluations to gain experience with the process.

Step 4: Review how you rated each performance factor or goal and the contents of each performance narrative before you determine the overall rating. Don't assign an overall rating based solely on the total number of marks (x) in a rating category, since certain factors should carry greater weight than others. For example, "quality of work" should be given greater weight than "personal appearance." It is important to remember that any performance evaluation has a degree of subjectivity; the process explained here is designed to enhance the evaluator's objectivity.

Step 5: An alternative strategy you can employ at a midyear evaluation is to have the subordinate prepare a self-evaluation prior to your conference. The pastor or supervisor would also prepare an evaluation before meeting with the employee. When using this method, allow the subordinate to present her or his evaluation *first*. After the subordinate finished, you (the supervisor) would then present your evaluation.

Step 6: Since there is always a great deal of anxiety at the time of a subordinate's evaluation, especially the first, obtain the subordinate's undivided attention by informing her or him of the overall rating at the beginning of the evaluation *if* the rating is "Good," "Excellent," or (eventually) "Outstanding." *If*, however, the overall rating is "Marginal" or "Unsatisfactory," it is more effective to evaluate each factor or goal as you progress through the evaluation form. Such a strategy will enable you to coach the subordinate as to how he or she can improve each "Marginal" or "Unsatisfactory" performance factor or goal. Obviously, you want to offer praise to your subordinate for "Excellent," "Good," and "Outstanding" ratings. It is critical that you be candid and accurate when administering a performance evaluation. As a means of ensuring accuracy when conveying facts or information about job performance, it is good practice to maintain a file folder for each subordinate. When you observe an action or inaction that affects a

subordinate's job performance either positively or negatively, write a brief note, date it, and drop it into their file. Later, when you begin preparing performance evaluations, you will have accurate information on hand to draw upon. [Also note what you said to the subordinate on that occasion!]

Step 7: For job performance to improve, the evaluation must be a two-way dialogue. Avoid being defensive; permit a subordinate to disagree with your evaluation of a performance factor or goal; be flexible. Changing one or two ratings of a factor or goal should not change the overall rating, however. Again, the objective of the evaluation process is to improve the subordinate's job performance. The result is a "win-win" situation!

Erwin Berry, *The Alban Personnel Handbook for Congregations* (N.p.: Alban Institute, 1999), pp. 38-40.