

**The Miami Valley
Unitarian Universalist
Fellowship**



Personnel Manual

As of 07-06-2016

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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 paid staff hired after July 1, 2013 except for temporary positions, cannot be members of MVUUF.

As stated in MVUUF Bylaw, Article VIII.B.6 (Hire/Fire Authority) and agreed to in the Minister's Letter of Agreement, the senior Minister, in consultation with the Board, and consistent with the mission and confines of the budget and Board-determined staff actions, may hire or terminate MVUUF employees.

All employees will be 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 Bylaws 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 will assist the Minister 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

The Minister and at least two 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.

The Minister may delegate members of the Personnel Committee to 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 Minister, 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, in collaboration with the Minister, 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 Minister, 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 Minister, 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

The Minister has final authority to hire. After reference checks are completed and deemed satisfactory, the Minister, the Chair of the Personnel Committee or designee will telephone the applicant selected for employment with a verbal employment offer. Employment will be offered for a 90-day probationary period. The Minister, the Chair of the Personnel Committee, or designee will 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 Minister, 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 Minister, 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: Custodian (PT), Director of Religious Education (PT), and Office Administrator (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.

Benefits Matrix

Benefit	Full Time	Part Time
Vacation Accrual Amount	<i>LOS</i> <i>Accrual Amt</i> 0-2 years – 12 days/year (96 hrs/year)	<i>LOS</i> <i>Accrual Amt</i> 0-2 years – 12 days/year (48 hrs/year)
<i>Note: LOS means Length of Service</i>	> 2 years – 18 days/year (144 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	7 paid holidays/year: New Year's Day, Martin Luther King Jr. Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Christmas Day. Prorated to match employee's daily hours worked.
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.	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.

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	10.0% of base pay	10.0% of base pay
FICA, Worker's Comp and Unemployment	Mandated	Mandated
Health Insurance	80% of the UUA Health Plan for full-time employees. 50% of the UUA Health Plan for immediate family members. If insurance is obtained elsewhere, reimbursements will be based on a budgeted rate per scheduled hour.	Determined by budget to reimburse the costs of health insurance premiums or other health-related expenses. Based on budgeted rate per scheduled hour.

¹Employees must complete one full year of employment before eligibility for pension contribution benefit begins.

5.3 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 offers the UUA health insurance plan to all eligible staff and encourages all staff to obtain health insurance 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 the UUA health insurance plan or 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 according to the benefits matrix, 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.

If the employee selects the UUA health insurance plan, the budgeted amount available will be paid by MVUUF directly to the insurer. This benefit is not taxable.

For non-UUA health expenses, 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: Assistant Religious Educator

Department: _____ Status: partial part time; 5 hours/week

Prepared by: Personnel Policies Task Force Updated: May 2014 Committees
responsible to:

OVERVIEW

The purpose of the Assistant Religious Educator is to provide support to the leadership of the religious education within MVUUF. The Assistant Religious Educator will take direction primarily from the Director of Religious Education (DRE) of MVUUF and will assist with the smooth and efficient management of all levels of child and youth religious education.

DUTIES

- Sunday Duties ○ Provide support for the YRE Wing, particularly on weeks when the DRE is not available.

- Religious Education Classroom Duties
 - Maintain and keep private records regarding background, safety screenings, and health information for children.
 - Track students year-to-year, monitoring attendance, issues, growing UU identity.
 - Display records of attendance
 - In each classroom
 - On RE spreadsheet, noting attendance and frequency of attendance.
 - Maintain an appropriate level of supplies and equipment in organized, safe, and clean manner.
 - Maintain a library for resource materials.
- Religious Education Wing Duties
 - Assign a volunteer to welcome, provide information, and collect contact information for new and prospective YRE participants and families on Sunday mornings.
 - Maintain the appearance of the YRE Wing.
 - Organize and maintain children’s library and prep room, including monitoring of snack donations for ingredients and expiration dates.
 - Maintain walls and rooms with relevant, up-to-date materials.
 - Assure maintenance of YRE bulletin board.
- Communication Duties Through Calls, Individual E-Mails, Group E-Mails, and In Person
 - Follow up personally with new and prospective YRE participants and families within one week.
 - Enroll teachers, parents, and volunteers into appropriate yahoo communication groups.

QUALIFICATIONS

- Enjoyment of and desire to work with children and youth.
- Ability to work in a team.
- 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.
- Two years’ experience in related work. High School diploma/
- Strong interpersonal skills, including relationship-building, written and oral communication.
- Be in sympathy with the mission, principles, and tenets of the MVUUF and the UUA.

Title: **Bookkeeper**

Department: Administration

Prepared by: Personnel Task Force

Committees responsible to: Finance Committee

Status: Partial part time; 6 hours/month

Updated: May 2014

OVERVIEW

The Bookkeeper completes bookkeeping-oriented tasks for the Fellowship. The Bookkeeper works closely on financial tasks in cooperation with the Treasurer and the Finance Committee Chair.

ACCOUNTABILITY

The Bookkeeper reports to the Minister.

DUTIES

- Maintain the financial records of the Fellowship in an accurate and timely fashion. This includes, but is not limited to, the “Specific Monthly Tasks” listed below. □ Assist with internal or independent financial audits as necessary.
- Recommend financial process improvements to the Office 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 upon arrival.
- Complete other bookkeeping-oriented tasks as assigned by the Treasurer or Finance Committee Chair.
- Coordinate the Bookkeeper’s tasks and schedules with the Office Administrator, as necessary.
- Maintain accurate records of working time spent each week. Report time worked to the Office Administrator in time for payroll submissions.
- Provide the Office Administrator, Treasurer, and Finance Committee with current phone and e-mail contact information for the Bookkeeper. Make best effort to respond to calls and e-mails within 24 hours. Notify by phone, voicemail, or e-mail the Office 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. Display conduct in accord with, and in support of, the Fellowship’s purposes and principles.
- Other duties as assigned.

SPECIFIC MONTHLY DUTIES

- Payroll
 - Record monthly payroll from Horizon report.
 - Reconcile PowerChurch report to Horizon report.
- Bank Reconciliation for PNC Bank
 - Enter direct debits from PNC Bank, non-automated clearing house items, e.g., bank fees
 - Review for any variances and make corrections as needed.

- Reconcile to the General Ledger (all).
- General Ledger
 - Maintain chart of accounts.
 - Reconcile balance sheet accounts.
- Financial Statement Preparations
 - E-mail the income statement, balance sheet, and general ledger activity (monthly data only) to the Treasurer in time for review at the monthly Finance Committee meeting.
 - Make corrections as needed.
 - Run final balance sheet and income statement and resend to Treasurer and Finance Committee Chair.
- Monthly Activities in conjunction with Office Administrator, as needed, as such:
 - Accounts Payables functions.
 - Accounts Receivable functions.
- Meetings and Committees
 - Attend meetings as required.
 - Report about special funds, such as Humanitarian Giving, to appropriate chair.

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

: Childcare Provider

Status: Hourly

Prepared by: Personnel Policies Task Force

Date: May 2016

OVERVIEW

The Childcare Provider provides safe, nurturing, and consistent care for children ages 0-12 at the Fellowship. Times may be arranged by mutual agreement with the Religious Education Staff or Congregational Coordinator as needed (including during church activities held on evenings and weekends).

ACCOUNTABILITY

Position reports to the Religious Education Staff

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 Religious Education Staff or Congregational Coordinator.

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 Religious Education Staff.
- 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
Prepared by: Personnel Task Force

Status: Partial part time, 8 hours per week
Date: May 2014

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.

ACCOUNTABILITY

The Choir Director reports to the Minister.

DUTIES

- Coordinate with the Music Director (when incumbent in place) and Music Program Representative to develop 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), program representative, and Religious Educator 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 and rehearsals in connection with the program themes.
- Assist in recruiting special music for Sunday programs.
- Schedule pianists for Sunday services.
- Work with Minister and others in planning music for Sunday services.
- Hire the Choir Accompanist cooperatively with Music Rep/Music Director (when in place) with Board approval. Supervise the Choir Accompanist.

Title

- 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.
- Schedule piano tuning.
- Other duties as assigned.

QUALIFICATIONS

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

Title: **Congregational Coordinator**
Prepared by: Personnel Task Force

Status: Partial Part time; 5 hours per week
Date: May 2014

OVERVIEW

The Congregational Coordinator is responsible for making connections to promote integrated networks of support and opportunity within MVUUF. To that end, the Congregational Coordinator will encourage the optimal use of human talents and resources within the Fellowship to help people and programs flourish. To facilitate these connections, the Congregational Coordinator will assess the needs and resources of the Fellowship. The Congregational Coordinator will create and maintain a data center (database or spreadsheets) identifying aspects such as the interests of new and old members; the talents of Fellowship members; available child care workers; the needs of the meals, wheels, and caring card appeals committee; and other ongoing projects within the MVUUF community. In this way, program or group leaders can secure adequate child care for their events, new and old members can be integrated into programs or activities of interest, Fellowship members can be contacted to perform services like handyperson or maintenance work, and support with rides, meals, or cards can be honored.

ACCOUNTABILITY

Position reports to the Minister

DUTIES

- Assess the needs and resources of the Fellowship in the areas of child care, new and old members, talents of Fellowship members, and needs of the meals, wheels, and caring card appeals committee
- Prepare and maintain data on child care providers, the interests of new and old members, the talents of Fellowship members, and the needs of the meals, wheels and caring card appeals committee.
- Use the data maintained to connect the membership resources with the needs of the congregation
- Actively recruit additions to these networks
- Keep accurate accounts of connections made

QUALIFICATIONS

- Evidence of organizational skills and ability to attend to detail
- Familiarity with Excel and other appropriate software programs
- Ability to work with diverse personalities and needs
- Enthusiasm for making connections among people
- Awareness of the variety of Fellowship organizations and activities like the RE program, covenant groups, orientation programs, and support for those in need of meals, rides, or cards

- Sympathy with the principles and practices of Unitarian Universalism

Title: **Custodian**

Status: Part Time; 20 hours/week

Prepared by: Personnel Policies Task Force

Updated: May 2014

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.

ACCOUNTABILITY

The Custodian reports to the minister.

DUTIES

- Maintain the building according to jobs outlined on the attached Itemization of Tasks.*
- Establish weekly schedule of hours with the Office Administrator.
- Maintain accurate records of working time spent each week. Report time worked to the Office Administrator.
- Notify Office Administrator and/or Operations Representative if repairs and/or maintenance are needed.
- 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 Office Administrator for reimbursement.
- Be alert to any building clean-up that needs to be done and perform such clean-up in a timely manner.
- Notify the Office Administrator when building usage has been unsatisfactory.
- Other duties as assigned. **

*Note: 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 Office 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.

QUALIFICATIONS

- The Custodian must be reliable and have a track record of steady work.

MVUUF CUSTODIAN ITEMIZATION OF RESPONSIBILITIES

Note: The frequency of performing the following job duties is to 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		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		X	X			
Dust	X				X			
Windows - clean	X				X			
Trash - empty all trash cans	X				X			
Door mat - vacuum	X	X	X	X				
Note: Custodian is not responsible for the cleaning kitchen sinks, counters and appliances or replacing supplies.								

Title: **Director of Music**

Department: Administration

Prepared by: MVUUF Music Task Force

Committees responsible to: Music, Worship

Status: Partial Part Time

Date: March 14, 2016

OVERVIEW

The DOM is an integral part of the ministry of the Fellowship, stimulating engagement with 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

- Develop a music program that stimulates and challenges the congregation, and conveys the ideals and principles of Unitarian Universalism.
- Responsible for preparing congregational singing, incidental music (ex: Prelude, Offertory, Postlude, etc.), and special music for Sunday morning services in coordination with the Minister and Worship Leaders.
- Provide accompaniment (or recruit accompanist) for weekly Sunday morning services throughout the year.
- Supervise other Fellowship music employees.
- Coordinate and prepare willing musicians in the congregation to perform special music as needed.
- Arrange for the Choir to perform special music 4-6 times a year for Sunday services.
- Coordinate Sunday morning rehearsals of service music for congregational Choir volunteers or soloists as needed.
- Attend regularly scheduled staff meetings, and submit annual budget requests to the appropriate committees, including maintaining spending records.
- Supervise and coordinate the maintenance of the congregation's musical instruments and library.

REPORTING RELATIONSHIPS

Position reports to Minister; Choir director and choir accompanist report to Music Director

QUALIFICATIONS

- Background in Music Education, Church Music, or Musical Theatre highly desirable
- Experience leading amateur musical groups of all ages
- Understanding the Principles and guiding tenets of Unitarian Universalism
- Familiarity with a wide variety of musical styles and traditions a plus

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

Department:

Prepared by: Personnel Task Force

Status: Part time, 25 hours per

Updated: August 2014

OVERVIEW

The purpose of the DRE is to provide leadership and guidance to MVUUF regarding religious education for children and youth. The DRE fosters a sense of community and a spirit of cooperation among the Religious Education program, its children, teachers, parents, and the larger congregation. The DRE collaborates with the volunteer teaching team, LRE Rep, the YRE committees, and the Fellowship staff to accomplish strategic planning for religious education and provide 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.

ACCOUNTABILITY

The DRE reports to the Minister.

DUTIES

Ongoing Duties

- Prioritize, plan, organize, lead, communicate about, and provide for the ongoing coordination and effectiveness of the YRE program.
- Evaluate and respond to children and teacher needs for appropriate learning environments, curricula, safety, and care.
- Create and maintain a learning environment that welcomes and nurtures participants.
- Implement MVUUF's Youth Religious Education policies, making recommended changes to the appropriate LRE/YRE representatives.
- Supervise, train, and support YRE staff, teachers, volunteers, and childcare providers.
- Recommend curricula to YRE committee.
- Oversee selection and delivery of curricula for children and youth.
- Plan and implement programming and special events in collaboration with the YRE Committee, teaching team, other volunteers, and staff.
- Coordinate rite of passage ceremonies for children and youth with Minister
- Consult with YRE Committee to coordinate youth groups.
- Attend all regularly scheduled YRE Committee meetings. Assure that minutes are kept and circulated.
- Attend Program Council meetings.
- Attend other committee and Board meetings as requested.
- Train and support volunteer teachers, leaders, YRE staff, and childcare providers for YRE programs and activities.

- Publicize curricula, program options, volunteers, activities, and/or newsworthy achievements in weekly e-blasts, monthly Forum articles, and on the MVUUF website.
- Maintain or oversee records regarding budget, professional growth, student registration, class roster and family contact information, attendance, background/safety screenings and health information for children
- Communicate with parents about discipline problems, allergies and medical issues, and/or policies and procedures as needed.

Sunday Duties

- Be present and available up to 5 hours on Sunday, actively engaged in the morning activities of YRE or attending service. If duties occasionally require being away from MVUUF on Sunday mornings, the DRE must ensure that all Sunday activities are fully staffed. Such occasions should be approved by the minister and coordinated with the Assistant Religious Educator to ensure that a designated staff member is always in charge.
- Coordinate child care for Sunday morning LRE classes.
- Assure that curricula and requested materials are available for teachers/volunteers.
- Oversee monthly worship experiences for children and youth.
- Provide or arrange for Words for All Ages or other child/youth appropriate components of Sunday worship.
- Collaborate with minister and Worship Committee on multi-generational worship services as requested.

Periodic Duties

- Provide fall training program, including information about allergies, medical issues, policies, and procedures
- Participate in strategic program review and planning for growth, development, and ongoing effectiveness of YRE program.
- Collaborate with the LRE Rep to develop and recommend an appropriate budget for the YRE program annually. Monitor and work within approved budget.
- Collaborate with the LRE Rep to prepare and present at congregational meetings a report summarizing curricula and program options.
- Ensure regular teacher recognition.

Perform other tasks or duties as assigned.

Study and Self-Development

- Maintain own spiritual, physical and emotional well-being.
- Participate in DRE training opportunities (for example: 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 UUA-approved professional religious education credentials 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 UUA.

Title: **Office Administrator**
Department: Administration
Prepared by: Personnel Policies Task Force
Committees responsible to: Board of Trustees

Hours: 30 per week
Status: Part time
Date: February 2009
Updated: May 2014

OVERVIEW

The Office Administrator is responsible for general office work, making available the weekly order of service and certain aspects of building use. The incumbent serves as record keeper for the membership and pledge functions of the Fellowship. This position manages the informational database, PowerChurch, assuring that associated actions and functions are timely and accurate. The Office Administrator works closely with the Minister, staff, Board, Program Council, and committees in the achievement of the goals of the Congregation, the Board, and the Minister. Because the Office Administrator is often the first contact a visitor has with the Fellowship, he/she must be familiar with and openly supportive of the policies and practices of the Fellowship and the Unitarian Universalist Association Principles and Purposes.

ACCOUNTABILITY

The Office Administrator reports to the Minister.

DUTIES

General Office Work

- Assure the smooth organization and operation of the Fellowship office functions. ○ Answer telephone in a welcoming manner, take accurate messages, and distribute them in a timely fashion. Program answering machine to give up-to-date information when the office is closed or staff aren't available.
 - Receive and distribute mail daily; maintain supply of postage.

- Inventory and purchase office supplies in a fiscally responsible manner. Oversee operation, maintenance, and repair of office equipment.
- Provide work direction to office volunteers and daily work direction to the Custodian.
- Assure employee enrollment in relevant MVUUF paperwork and benefits plans. Monitor hire dates to enroll employees in relevant anniversary-related benefits. Maintain appropriate forms in the Fellowship office. Run background checks.
- Marketing activities, such as
 - Creating brochures and flyers as needed
 - Keeping pamphlet rack filled
 - Informing webmaster of necessary changes to website
 - Keeping the Fellowship calendar up-to-date
 - Prepare and/or edit and distribute informational electronic messages to membership, such as weekly and monthly updates.
- Support the Minister, congregation, and committees of the Fellowship
 - Copy and distribute annual and semi-annual Board reports when requested.
 - Schedule appointments.
 - Assure Sunday bulletins are available by receiving/soliciting information, creating file, coordinating printing.
 - Order and update Fellowship plaques as needed.
 - Order and personalize (if necessary) Sanctuary chairs as needed.
 - Assist with Planned Parenthood book drop via Social Concerns Committee.

Building

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

Membership

- Maintain and track all address lists (membership, friends, visitors, Forum, and UU World subscription).
- Mail information packets to guests and interested persons.
- Send letter to all guests, new members, and those who resign in a timely fashion.
- Keep Membership Committee updated as to new members including addresses and telephone numbers, as well as resignations.
- Keep Treasurer, Finance Committee, and Canvas Committee informed of new members and pledge status of all pledging units; maintain records of pledge receipts.
- Certify membership with UUA in collaboration with the Membership Rep.

Organizational Business and Finances

- Provide input and output from the database management system, PowerChurch (PC), in an accurate and timely manner.
 - Enter new vendors in PC as needed.
 - Enter payables into PC using requisition forms.
 - Process and send payments to vendors.
 - Prepare other checks as needed.
 - Enter cash receipts in PC and record weekly deposits.
- Prepare payroll information for submission to Payroll Service Company.
- Send acknowledgements and thank you notes for memorial gifts.
- Maintain individual contribution records.
- Prepare and mail quarterly and annual contribution statements.
- Assist Bookkeeper as needed.

Other duties as assigned.

QUALIFICATIONS

- Education: 2 year degree or equivalent experience
- Experience: A minimum of 2 years' experience working in a similar environment with similar accountabilities

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.)

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 () Involuntary () Reduction in Staff ()	23) Last Day Worked:	24A) Severance Pay: Yes () No ()	24B) No. of Days/Dollar Amount

<p>APPROVAL / COMMENTS</p>	<p>25. Sr. Pastor _____</p> <p>Date ____</p> <p>Supervisor _____</p> <p>Date ____</p> <p>Personnel Liaison/ Committee Chair _____</p> <p>Date ____</p>	<p>26) Comments</p>		
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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 Explain Fair Treatment policy for dealing Completed Employment forms: with concerns

W-4: Federal and State Other information/Answer questions I-9: Department of Immigration Work Safety and Fire Prevention:

State Work Permit for minors Contact supervisor in case of accident Employment application (if not completed) Location of first aid kit

Insurance applications (if eligible) Slippery floors

Tour of church and work area; introduction Objects on floor to coworkers and review of work schedule Lifting objects

Explain church rules (working Proper shoes (Housekeeping from the Employee Manual with employee) employees)10. On the job training:

Three-month training period Review of work materials and schedule Importance of attendance and punctuality Review of job description

Phone supervisor when ill or delayed Introduction to trainer who will explain job

Parking Employee observes job tasks

Personal appearance Employee performs job tasks

Performance evaluations and wage Trainer corrects employee if needed

increases 1. End of day review with employee by

Staff meeting: day and time and importance supervisor of attending

How did your day go?

Questions?

Orientation completed:

—

Date	Supervisor	Employee
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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

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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.