

**Minister, Personnel
Committee
Office Administrator
and
Office Assistant
Handbook**

UUCSC
2014

The purpose of this handbook is threefold:

- 1) To help the Personnel Committee work with the Office Administrator (O.A.) and Office Assistant (A.O.A.) carry out their duties following the timeline approved by the UUCSC Board.
- 2) To clarify the protocols for staff evaluations (appraisals), and resolving employee issues, as stated in the Personnel Policy Manual. *See the Appendix for excerpts from the Personnel Policy Manual (P.P.M.).*
- 3) The Supervisor is defined in the Personnel Policy Manual as the Minister, or the Office Administrator. Committees are not supervisors, and do not have authority to discipline or otherwise sanction employees.

The Personnel Committee is directed to review the following sections with the staff members every year, during the September meeting. *(It should be noted that each employee has been given a Personnel Policy Manual and has signed it, formally acknowledging receipt and their responsibility to “read the Manual and comply with the policies, practices and rules of the Employer.”)*

I. O.A. Timeline: Sequence of duties from the P.P.M., section V. E., revised for this handbook.

A. CALENDAR

- September*
- Review Committee Handbook procedures with O.A.
- O.A. writes personal goals and submits to Minister

- October*
- O.A. submits goals to Board and copies to Personnel Committee

- December*
- Office Administrator reviews annual budget, and if additional funds are needed, submits request to Board and Finance committees no later than 1 week before January Board Meeting

- March*
- O.A. and Minister each complete separate evaluations by 3/15, exchange and review, and sign the 2 evaluations by 3/21
- Minister/O.A. submit any requested changes relating to preparation of a new contract to Personnel Committee

- April*
- Minister files the 2 evaluations and reports the results to the Board and the Personnel Committee 7 days before April meeting

- May*
- Minister and O.A. meet to plan coming year program and review past year's program

- June*
- Resolve any unfinished business; refer to Board any unresolved issues 7 days before June Board meeting

II. A.O.A. Timeline: *See the appendix for P.P.M. section I. N., Performance Evaluation.*

- September: A.O.A. writes personal goals
- October: A.O.A. submits goals to Office Administrator (O.A.)
- March: Office Administrator and A.O.A. each write separate evaluations by 3/15. Evaluations are based on job descriptions, annual goals, quality and quantity of work, effective interpersonal relations, dependability, attendance and punctuality
- Office Administrator and A.O.A. exchange, review and sign the 2 evaluations by 3/21
- April: Office Administrator gives 2 evaluations to Minister for review. Minister reports the results to the Board and the Personnel Committee 7 days before April meeting
- Unresolved issues, such as an evaluation signed with objections, are to be brought to the attention of the Personnel Committee by the Minister when the evaluations are submitted to the Board

III. Resolving Employee Issues

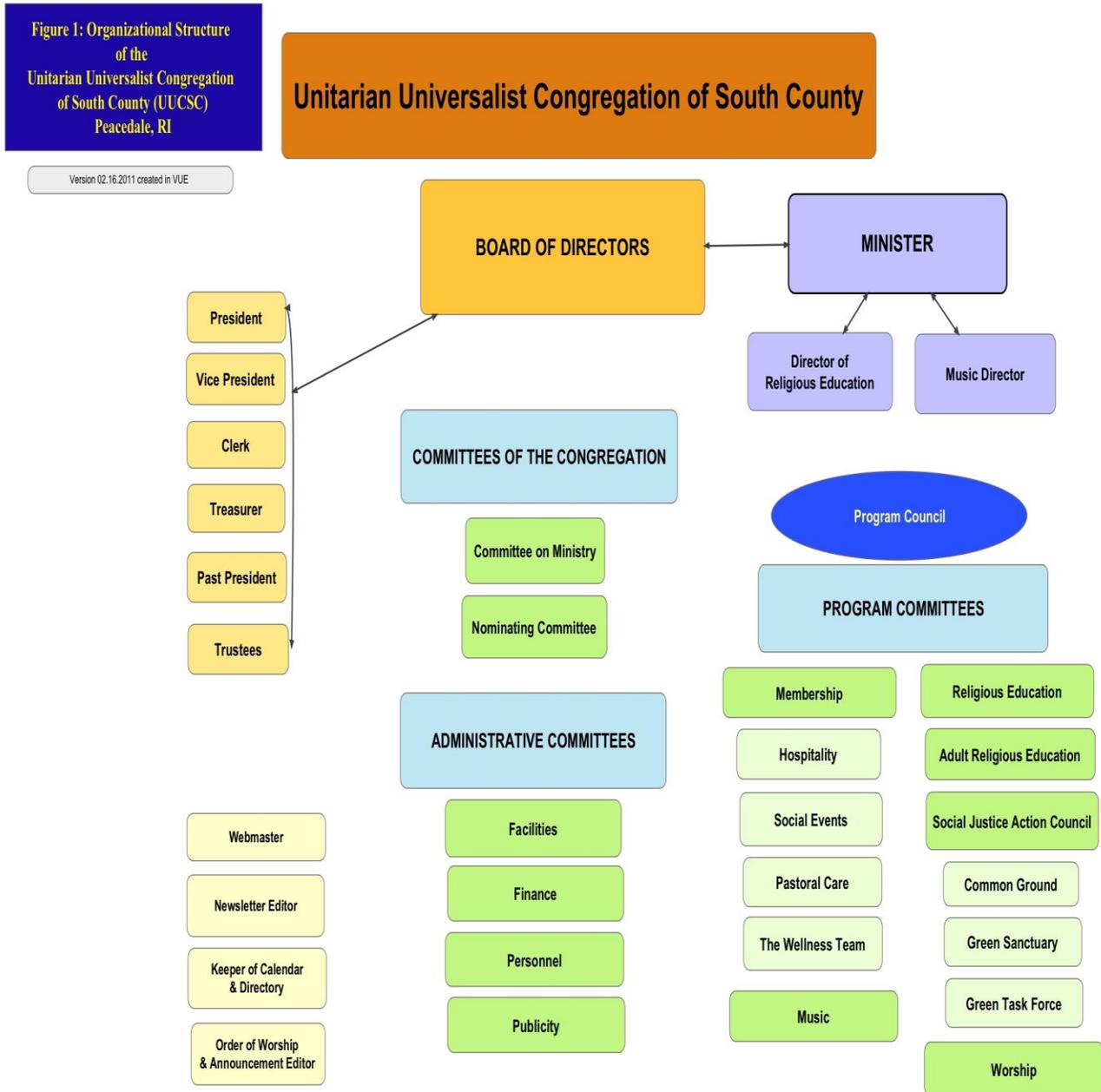
The bullets explain the **Formal Procedure** the O.A., A.O.A. or Minister should take, after every effort has been made to work things out, collaboratively. *See the appendix for P.P.M. section I. N., Resolution of Employee Complaints.*

Formal Procedure

- The A.O.A., O.A. or Minister requests a meeting with the Personnel Committee
- Personnel Committee will investigate and/or hold a hearing, and recommend a resolution to the problem
- If Personnel Committee's resolution is not satisfactory to either of the parties, the Board will review the Personnel Committee's recommendation. The Board's resolution to the issue is final and binding

IV. Diagram of the UUCSC’s Organizational structure (VI.)

Note: Office Administrator should be shown under supervision of the Minister. Assistant Office Administrator should be shown under Office Administrator.



Note: All committees and Supervisor report directly to Board; staff (DRE, MD) report to Minister. Group headings are nominal, and are those used in the UUCSC Bylaws section headings.

UUCSC STAFF Appraisal Process

The appraisal process involves the following three components:

Program Appraisal

The staff member and the appropriate committee will engage in a review of how well program goals are met. This appraisal will be shared with the minister.

Program goals:

- are established by the appropriate committee in consultation with the staff member associated with the program.
- are written prior to the beginning of the program year. The staff member's supervisor will ensure that this process occurs.

The year-end appraisal will:

- assess how well the program achieved the goals.
- assess how well the appropriate committee, staff, and congregation collaborated to achieve the goals
- reflect on how the program is being received in the congregation.

Appropriate committee chairs will write a summary of their team's appraisal and give a copy to the Minister.

Staff Self-Appraisal

Each staff member will:

- evaluate their contributions to the goals associated with their program (see program appraisal)
- evaluate their success in meeting their personal professional goals
- reflect on the following questions:
 - Does the job description accurately describe the job you perform?
 - What did you bring to your job this year that best served the congregation?
 - What do you think is the most under appreciated part of your job?
 - What aspects of your job and/or your job performance would you like to work on in the future?
 - What aspect of your work this year are you most proud of?
 - What professional activities have you been involved in this year?

Supervisory Appraisal

The staff member's supervisor will:

- meet with the staff person to discuss and review the program appraisals and staff self-appraisals
- write an overall performance appraisal assessing;
 - the extent to which the staff person met the requirements of the job description
 - the extent to which the staff achieved their professional goals for the year
 - the staff person's skill at communication, collaboration, and commitment to UUCSC's mission.

The final steps of the employee appraisal process are as follows:

The supervisor will meet with staff member to discuss the performance appraisal.

- The supervisor and the staff member will sign the appraisal to acknowledge that the appraisal process did occur.

- Appraisals will be filed and confidentiality maintained in the UUCSC staff members personnel files.
03/09/14

V. Appendix: Excerpts from the P.P.M.

1. (II. Annual Evaluations)

PERFORMANCE EVALUATION (I. N.)

Employees are evaluated annually with two written performance evaluations. Each employee will write his or her own performance evaluation. The employee's supervisor will write a separate performance evaluation. Both evaluations will be completed by March 15, and signed by March 21. Both evaluations will be maintained in the Employee's permanent personnel file. Factors considered in assessing performance include, but are not limited to: job description, annual goals, quality and quantity of work and duties as directed by the supervisor; dependability; attendance and punctuality; effective interpersonal relationships with the congregation, and personal conduct. Refer to the relevant Committee Handbook for more information on the evaluation process (Table of Contents, IX).

Employees report to the following supervisor: Sexton—Office Administrator; Assistant Office Administrator—Office Administrator; Office Administrator—Minister; Director of Religious Education—Minister; Director of Music—Minister.

In collaboration with their respective supervisor, employees are requested to identify goals and objectives prior to the beginning of the evaluation period, so that their work may be evaluated on the basis of clear criteria they have helped to develop.

The evaluation process is as follows: In March, the supervisor, and employee each write their own employee evaluation, completed by March 15. If the supervisor and employee agree on the evaluation by signing their names with no objections by March 21, the supervisor places the 2 performance evaluations in the employee's personnel file, and notifies the Board and Personnel Committee seven (7) days before the April Board meeting. The supervisor advises the Personnel Committee to proceed with preparation of a new contract.

In the event of any unresolved issues, such as the employee signing any of the evaluations with objections, the parties have until the May Board meeting to resolve them. Unresolved issues should be directed to the Personnel Committee. The Personnel Committee will gather the evidence necessary to complete an investigation and/or hold a hearing. The Personnel Committee shall then recommend a resolution of the issue(s). If the Personnel Committee's recommendation does not resolve the issue(s) to either party's satisfaction, the dissatisfied party may then seek a review by the Board. The resolution recommended by the Board shall be binding on all parties. A contract for the next fiscal year is offered only after a satisfactory resolution of the outstanding issue(s).

2. (III. Resolving Employee issues)

RESOLUTION OF EMPLOYEE COMPLAINTS (I. E.)

Effective communication is essential for productive working relationships. To that end, employees are encouraged to discuss any concerns about work or suggestions for improving operations in the following manner:

The employee should present any complaint or grievance to his or her supervisor and together discuss the problem, applicable rules or policies, and possible resolution.

If discussion with the supervisor does not resolve the matter to the employee's satisfaction, the employee should submit the complaint or grievance in writing to the Minister.

If discussion with the Minister does not resolve the matter to the employee's satisfaction, the employee should submit the complaint or grievance in writing to the Personnel Committee, which will gather the evidence necessary to complete an investigation and/or hold a hearing. The Personnel Committee shall then recommend a resolution of the problem. If the supervisor is the Minister, then unresolved grievances should be directed to the Personnel Committee.

If the Personnel Committee's recommendation does not resolve the matter to the employee's satisfaction, the employee may then seek a review by the Board. The resolution recommended by the Board will be binding upon all parties involved in the grievance.

The following is excerpted from section IV. B. The Supervisor is either the Minister or the Office Administrator.

B. WORK AND DISCIPLINARY GUIDELINES (IV. B)

Certain guidelines must be observed by all employees to protect the integrity of the congregation. Violations may result in disciplinary measures, including verbal warnings, written warnings or termination.

Disciplinary Procedure (IV. B. 2.)

All other matters of employee performance will be handled in a progressive process designed to improve the employee's performance in a fair and equitable manner.

Step 1 – Supervisor issues a verbal warning, outlining the problem with corrective action. Corrective action required in next 14 days.

Step 2 – Supervisor issues a written warning, covering the recurrence of the problem with written corrective action required in next 14 days.

Step 3 – Board issues a Termination notice as a result of no corrective action being taken by employee.

JOB DESCRIPTION

TITLE:	Office Administrator	DATE:	May 19, 2011
REPORTS TO:	Minister	LAST REVIEWED:	April 17, 2014

SUMMARY

Position provides administrative actions and clerical support for the Unitarian Universalist Congregation of South County (UUCSC).

DESCRIPTION

1. Acts as receptionist, and engages in general office duties, including:
 - a. Answers and routes phone calls;
 - b. Opens and distributes mail;
 - c. Responds to e-mail as appropriate.
2. Acts as administrative assistant to Minister—to be negotiated with Minister.
3. Develops, maintains, and administers office and systems.
 - a. Develops and maintains central records system for UUCSC.
 - b. Maintains office equipment and interfaces with related vendors and servicers.
 - c. Maintains office supplies.
 - d. Tracks office security, including building key distribution.
 - e. Maintains UUCSC calendars.
 - f. Communicates with Webmaster and Newsletter Editor regarding congregation and community news.
 - g. Produces weekly Order of Service and Bulletin with input from Minister (or worship leader), Director of Music, Director of Religious Education, and Worship Committee.
 - h. Manages building rentals and usage records.
 - i. Maintains church mailing list, membership information, and databases
 - j. Processes all checks/cash brought to the office, other than pledge contributions.
 - k. Gathers material for UUCSC newsletter; finalizes newsletter format; produces for mailing; and supervises mailing process (currently performed by Karen Ellsworth).
 - l. Supports work of Board and Committees as needed
 - m. Collaborates with Board and Committees on updates to congregational documents i.e. ‘How Do I?’ book.
 - n. Supervises Office Assistant (A.O.A.)

REPORTING RELATIONSHIP

Reports directly to Minister, works under indirect supervision of Board, meets with Personnel Committee as needed.

EDUCATION AND EXPERIENCE REQUIREMENTS

- Minimum of high school diploma (or equivalent)
- 3 years of clerical (or equivalent) experience

- Experience with and skilled in current computer applications/technologies, including, but not limited to: word processing, spreadsheet, presentation, and database applications (such as Word, Excel, and PowerPoint); internet applications, including e-mail.
- Solid communication skills, and experience with dealing directly with public.
- Hiring conditional upon acceptable Background Criminal Investigation

DESIRABLE SKILLS AND ABILITIES:

- Ability to maintain print and electronic financial and other database records.
- Experience & competence with publications, database, and graphics software.
- Experience with computer and other technologies; knowledge of maintenance, service, and repair needs.

PERFORMANCE EVALUATION (Appraisal)

Performance of duties and responsibilities per goals established will be evaluated annually. Annual goals will be developed and assessed in collaboration with the Minister and the Personnel Committee.

**UNITARIAN UNIVERSALIST CONGREGATION OF SOUTH COUNTY
JOB DESCRIPTION**

TITLE:	Office Assistant (A.O.A.)	DATE:	May 8, 2013
REPORTS TO:	Office Administrator/Minister	LAST REVIEWED:	May 8, 2013

SUMMARY

Position provides a assistance to the office administrator with both administrative actions and clerical support for the Unitarian Universalist Congregation of South County (UUCSC) for one-half day per week, four hour shift.

DESCRIPTION

1. Acts as receptionist, and engages in general office duties, including:
 - d. Answers and routes phone calls;
 - e. Opens and distributes mail;
 - f. Responds to e-mail as appropriate.
2. Assists in maintaining and administering office and systems.
 - a. Maintains office equipment and interfaces with related vendors and servicers as needed, as needed.
 - b. Follows procedures for office security, including building key distribution.
 - c. Keeps records of calendar requests for Office Administrator(OA).
 - d. Prints, collates and folds weekly Order of Service and Bulletin for Sunday distribution and other publications as created.
 - e. Records requests for building rentals and usage for OA.
 - f. Assists with church mailing list, membership information, and databases as needed.
 - g. Collects and records incoming money/revenues and provides receipts other than pledge contributions.
 - h. Gathers material for Announcements, Weekly-Highlights.
 - i. Filing and file maintenance.

REPORTING RELATIONSHIP

Reports directly to Office Administrator, and works under indirect supervision of Minister and Board.

EDUCATION AND EXPERIENCE REQUIREMENTS

- Minimum of high school diploma (or equivalent)
- 3 years of clerical (or equivalent) experience

- Experience with and skilled in current computer applications/technologies, including, but not limited to: word processing, spreadsheet, presentation, and database applications (such as Word, Excel, and PowerPoint); internet applications, including e-mail.
- Solid communication skills, and experience with dealing directly with public.
- Hiring conditional upon acceptable Background Criminal Investigation

DESIRABLE SKILLS AND ABILITIES:

- Ability to maintain print and electronic financial and other database records.
- Experience & competence with publications, database, and graphics software.
- Experience with computer and other technologies; knowledge of maintenance, service, and repair needs.

PERFORMANCE EVALUATION

Performance of duties and responsibilities per goals established will be evaluated annually. Annual goals will be developed and assessed in collaboration with the Minister and the Personnel Committee.