

**Congregational
Administrator, Minister,
and
Personnel Committee
Handbook**

UUCSC
2014

The purpose of this handbook is threefold:

- 1) To help those committees that work with staff members carry out their duties following the timeline approved by the UUCSC Board.
- 2) To clarify the protocols for staff and program evaluations, and to resolve employee issues as stated in the Personnel Policy Manual. The protocol for evaluating staff members was changed by the UUCSC Board in the fall of 2013 to align with the UUA's recommended protocol. The new protocol removes the committees from the staff evaluation process. However, the committees will continue to write program goals and a Program Evaluation each year following the timeline below. *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 Congregational Administrator. Committees are not supervisors, and do not have authority to discipline or otherwise sanction employees.

Each committee is directed to review the following sections with its employee 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.")*

The Congregational Administrator (CA) presents a special case with regard to the Personnel Committee (PC). As the CA works directly with the Minister, the PC's only role is to facilitate the goal setting and evaluation process.

I. Timeline: Sequence of CA, Minister, and PC committee's duties from the P.P.M., section V. E., revised for this handbook.

A. CALENDAR

- September
- Review Handbook procedures with CA
- CA writes personal goals and submits to Minister

- October
- CA submits goals to Board 7 days before October meeting

- December
- CA and Minister review annual budget, and if additional funds are needed, submit request to Board and Finance committees no later than 1 week before January Board Meeting

- March
- Minister completes the evaluation by 3/15, reviews it with the CA, and the CA signs the evaluation by 3/21
- CA/Minister submit any requested changes relating to preparation of a new contract to Personnel Committee

- April
- Minister files the evaluation and reports the results to the Board and the Personnel Committee 7 days before April meeting
- May
- CA and Minister 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
- Sign contract

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

- September: CA writes personal goals
- October: CA submits goals to Board 7 days before October meeting
- March: Minister writes the evaluation by 3/15. Evaluations are based on job descriptions, annual goals, quality and quantity of work, effective interpersonal relations, dependability, attendance and punctuality
- CA and Minister review and sign the evaluation by 3/21
- April: Minister files the evaluation and 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

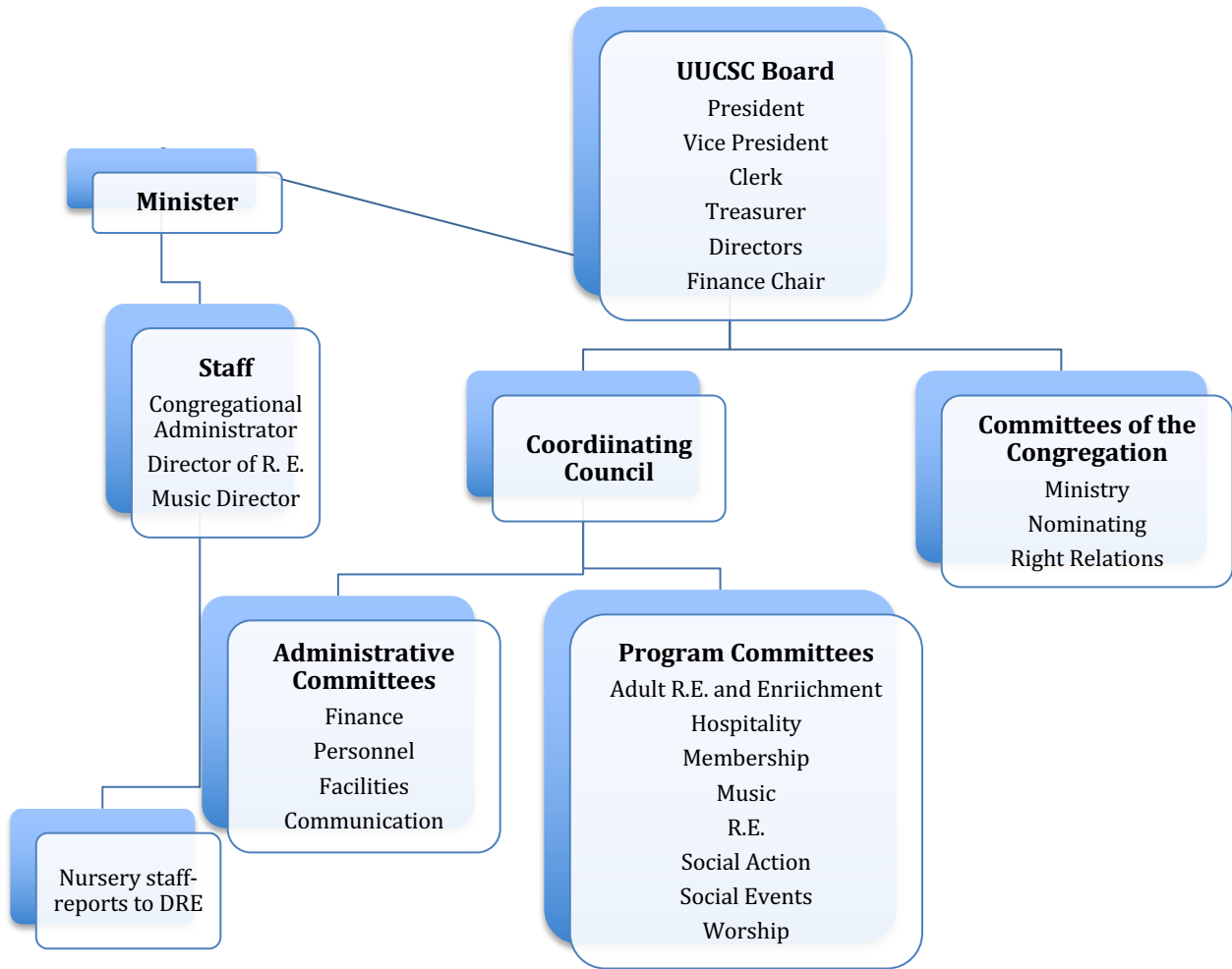
III. Resolving Employee Issues

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

Formal Procedure

- The CA 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.)
UUCSC Organizational Chart



Note: All committees and Supervisor report directly to Board; Staff report to Minister. Group headings are nominal and are those used in the UUCSC Bylaws section headings.

Thank you for reviewing and following these guidelines and procedures. May your committee accomplish its work in a loving, open and joyous spirit.

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

1. (II. Annual Evaluations)

PERFORMANCE EVALUATION (I. N.)

Each employee is evaluated annually with a written performance evaluation. The minister/supervisor will write each evaluation. All evaluations will be completed by March 15, signed and filed by March 21. The evaluations will be maintained in the Employees' permanent personnel files. 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—Congregational Administrator; Assistant Office Administrator—Congregational Administrator; Congregational 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 minister/supervisor writes each employee evaluation. Evaluations must be completed by March 15 and filed by March 21. If the supervisor and employee agree on the evaluation by signing their names with no objections, the supervisor places the performance evaluation 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 her/his evaluation 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, 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 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 within 14 days.

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

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