

Congregational Administrator Handbook: Last Revised 09-30-21

Congregational Administrator Handbook

UUCSC 2014
(Revised 2023)

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

The purpose of this handbook is threefold:

1. To help the Congregational Administrator (CA) carry out their duties by following the timeline approved by the UUCSC Board.
2. To clarify the protocols for evaluations, and to provide guidance in resolving employee issues as stated in the Personnel Policy Manual.
3. To clarify the role of supervisor as defined in the Personnel Policy Manual. The minister is the supervisor of the Congregational Administrator. The PC's role is to facilitate the goal setting and evaluation process. In the event that there is no settled minister, or the minister is not available, the Personnel Committee acts as supervisor.

The CA is directed to review the following sections with their supervisor every year during the September meeting.

CA EVALUATION CALENDAR

- September
- Review Handbook procedures with supervisor

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

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- April
Supervisor/Minister files the evaluation and reports the results to the Board and the Personnel Committee 7 days before April meeting
- June
- Resolve any unfinished business; refer to Board any unresolved issues 7 days before June Board meeting
- August
Sign contract (after approval at annual congregational business meeting)

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: Supervisor/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 Supervisor/Minister review and sign the evaluation by 3/21
- April: Supervisor/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 Supervisor/Minister when the evaluations are submitted to the Board

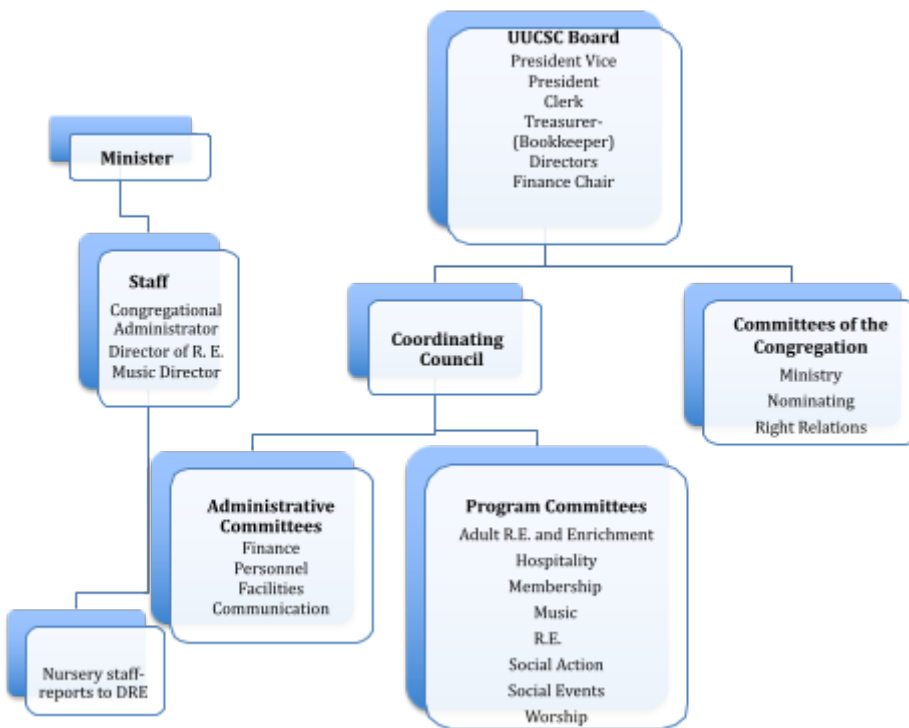
III. Resolving Employee Issues

The bullets explain the **Formal Procedure** the CA or Supervisor/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 Supervisor/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 the 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.

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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: Congregational Administrator— Supervisor/Minister; Director of Religious Education—Supervisor/Minister; Director of Music— Supervisor/Minister; Bookkeeper-Treasurer/Board of Directors.

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.

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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 Supervisor/Minister.

If discussion with the Supervisor/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.

3. 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.

VI. CONGREGATIONAL ADMINISTRATOR JOB DESCRIPTION (8/21)

UNITARIAN UNIVERSALIST CONGREGATION OF SOUTH COUNTY JOB DESCRIPTION: CONGREGATIONAL ADMINISTRATOR

TITLE:	Congregational Administrator	DATE:	August 12, 2021
REPORTS TO:	Minister/Supervisor	LAST REVIEWED:	August 12, 2021

SUMMARY

Responsible for a variety of administrative office tasks with minimal guidance. Manages office procedures to support staff, governing board, and committee chairs. Coordinates

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the long-term and short-term rental of the building and supports users when needed. Publishes both print and digital works. Prepares monthly reports for the governing board, including recommendations for more efficient office procedures. Supports the mission of the organization and its policies.

DESCRIPTION of DUTIES

1. Work closely with the minister, professional staff, Board members and committee chairs to provide organizational support.
2. Manage office procedures, facilities (including keys and key codes), and the congregational online calendar.
3. Perform general office duties including but not limited to answering and routing phone calls, emails, and traditional mail.
4. Manage building rentals by outside individuals or groups, or UUCSC members and troubleshoot questions from users as needed.
5. Maintain the current membership records, including
 - a. Master Congregational Spreadsheet
 - b. online Member Directory
 - c. emails in Constant Contact
6. Maintain current congregational documents as dictated by the UUCSC document retention policy, including UUCSC historical documents, and digital documents on the UUCSC website, in collaboration with the Board of Directors, Committee Chairs, and Communications Committee
7. Collaborate with the professional staff, board, and committee chairs to produce:
 - a. the weekly Order of Service for Sunday worship,
 - b. the weekly email newsletter, supplemental and emergency messages, as needed, using Constant Contact application.
 - c. the UUCSC website.
 - d. special event material preparation including memorials and weddings for UUCSC members.
 - e. materials and mailings for the annual meeting in June.
 - f. special mailings including stewardship, etc..
 - g. membership information
8. Collaborate directly with the UUCSC Financial Assistant and Board Treasurer as needed to maintain/establish contracts, vendors (collecting W9s), office equipment, office and congregational supplies, in line with relevant budget allotments.

REPORTING RELATIONSHIP

Reports directly to the Minister/Supervisor.

EDUCATION AND EXPERIENCE REQUIREMENTS

- High school diploma (or equivalent), Bachelor's degree preferred.
- 3 years minimum experience in office management, with a non-profit organization preferred.
- Skilled in current computer applications/technologies, including, but not limited to

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MS Office (including mail merge), Google Office Suite, Internet applications, and web publishing.

- Clear Background Criminal Investigation Check.

QUALITIES DESIRED

- Respect for Unitarian Universalist values and principles.
- The ability to maintain confidentiality in general, and specifically in relation to ministry, financial and pastoral concerns.
- Excellent communication and collaboration skills.
- Independent worker.
- Confident problem solver.
- Willing learner, strong desire to improve skills, as technology needs develop.
- Ability to organize and prioritize multiple tasks.
- Calm presence while dealing with complex issues.

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 Supervisor/Minister and Board President, approved by the Board.

HOURS AND SALARY

Part time, 21 hours/week, salary range \$20-\$25/hour. (time and salary for 2022, see annual contracts for changes in time or salary)