

**Unitarian Universalist Church of Tallahassee
2810 N. Meridian Road
Tallahassee, FL 32312**

**Appendix 8
STAFF PERSONNEL MANUAL**

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TABLE OF CONTENTS

SECTION A. GENERAL POLICIES AND PRACTICES

A.1. Employment Philosophy	5
A.2. General Purpose of Manual	5
A.3. Relationship with Minister as Chief of Staff	5
A.4. Role of Support Teams	5
A.5. Civil Rights/Equal Employment Opportunity	5
A.6. Internet Policy	6
A.7. Confidentiality	6
A.8. Alcohol and Drug-Free Workplace.....	7
A.9. Church Policies	7
A.10. Employee Personnel Files.....	7
A.11. Employee Use of Church Facilities	7

SECTION B. WAGE, HOUR AND JOB ADMINISTRATION

B.1. Staff Position Descriptions.....	7
B.2. Hiring	8
B.3. Probationary Period.....	8
B.4. Employment Eligibility Verification	8
B.5. Employment Classifications	8
B.6. Taxes	8
B.7. Work Hours and Schedule	8
B.8. Timekeeping.....	9
B.9. Overtime and Compensatory Time Off	9
B.10. Volunteer Work.....	9
B.11. Orientation	9
B.12. Church Membership and Participation	9

SECTION C. LEAVE AND VACATION POLICIES

C.1. General Leave Policy	10
C.2. Vacation Leave	10
C.3. Personal Leave	11
C.4. Family Leave.....	11
C.5. Paid Holidays	11
C.6. Sabbatical Leave	11

SECTION D. EMPLOYEE BENEFITS

D.1. Health Insurance	12
D.2. Other Health-Related Benefits.....	12
D.3. Workers' Compensation Insurance.....	12
D.4. Retirement Plan.....	12
D.5. Professional Expenses.....	13

D.6. Annual Letters of Rehire.....13

SECTION E. STAFF PERFORMANCE REVIEWS

E.1. Performance Expectations.....13

SECTION F. RESOLUTION OF COMPLAINTS

F.1. Resolution of an Employee Complaint.....13

F.2. Resolution of a Complaint by a Congregant to a Staff Member14

SECTION G. TERMINATION OF EMPLOYMENT

G.1. Termination of Employment.....14

G.2. Termination Procedures.....14

ATTACHMENTS: PROCEDURAL DOCUMENTS

#1 – Procedures for Hiring New Personnel: Regular, On-going Positions15

Followed by:

- *Employment Application* form
- *Authorization and Request for Background Investigation* form
- *Reference Check by Telephone* form

#2 – Letter of Hire Template for Regular Positions28

#3 – Procedures for Hiring Temporary and Limited-Hours Personnel30

#4 – Letter of Agreement Template for Temporary Positions33

#5 – Letter of Hire Template for Limited-Hours Positions35

#6 – Letter of Rehire Template for Regular Positions.....37

#7 – Letter of Rehire Template for Limited-Hours Positions.....39

#8 – Procedures Upon the Departure of an Employee40

#9 – Employee Exit Interview Form42

#10 – Employee Separation Form43

#11 – Items That Should Be in Each Staff Person’s Personnel File.....44

#12 – Corrective Actions45

#13 – Shared Responsibilities Grid for UUCT Programs51

#14 – Staff Contact & Emergency Information Form	53
#15 – Staff Position Description: Office Administrator	54
#16 – Staff Position Description: Director of Religious Exploration	57
#17 – Staff Position Description: Music Director	59
#18 – Staff Position Description: Chief Childcare Provider	61
#19 – Staff Position Description: Assistant Childcare Provider	63
#20 – Staff Position Description: Sexton	64
#21 – Staff Position Description: Special Event Site Coordinator	66
#22 – Staff Position Description: Religious Exploration Coordinator	68

STAFF PERSONNEL MANUAL

SECTION A. GENERAL POLICIES AND PRACTICES

A.1. Employment Philosophy

We believe that anyone who is employed by or provides a service to the church should be treated with respect and paid a fair and equitable wage. The Unitarian Universalist Church of Tallahassee (UUCT) strives to meet the Fair Compensation guidelines of the Unitarian Universalist Association.

A.2. General Purpose of Manual

This manual provides a general explanation of the personnel policies for all non-ministerial employees of UUCT. For specific questions about benefits, the final authoritative sources are the appropriate plan documents and amendments, insurance contracts, and rules and regulations of the Internal Revenue Service. These policies do not apply to ministers serving the congregation, for whom governing policies and procedures are detailed in individual Covenants and Working Agreements.

A.3. Employee Relationship with Minister as Chief of Staff

All employees, whether supporting friends or un-affiliated, acknowledge that their primary relationship with the congregation's Minister is a working, professional one. The Minister serves as Chief of Staff providing day-to-day supervision of most staff members, with the assistance, as needed, of lay leader support teams, as outlined in staff position descriptions. While childcare providers come under the Minister as Chief of Staff, the Director of Religious Exploration provides day-to-day supervision. Due to their limited hours, they do not have lay leader support teams.

A.4. Role of Support Teams

The role of the support teams of lay leaders is to assist the Minister, as needed, in the supervision and support of the designated staff members, in keeping with the Minister's supervision. While a support team member may work directly with a staff member on a task falling under that team member's area of responsibility, this is done under the overall staff direction of the Minister as Chief of Staff. In addition, support teams:

- Participate in a joint support team meeting with the Minister and relevant staff each year,
- Participate in reviews of Shared Responsibilities Grid,
- Review and approve changes in Staff Position Descriptions, along with the Minister and staff, and
- Serve on search committees for hiring new staff members.

A.5. Civil Rights/Equal Employment Opportunity

It is the policy of UUCT to ensure respect for the human rights of all employees. UUCT does not discriminate or establish policies on the basis of race, religion, ethnic origin, gender, gender identity and expression, sexual orientation, disability, or age. Sexual harassment is prohibited and shall not be tolerated. Unwelcome sexual advances, requests

for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment.

If an employee feels he or she has suffered discrimination or harassment of any kind:

- The employee should report that conduct immediately to the Minister as Chief of Staff or to his or her immediate supervisor if other than the Minister.
- If the immediate supervisor, other than the Minister, or a member of the employee's support team is implicated in the complaint of discrimination or harassment, the employee should report the conduct to the Minister.
- If the Minister is implicated, the employee should report the conduct to the Executive Board President.

Every complaint or report of discrimination or sexual harassment shall be promptly investigated by the person to whom the complaint or report is made. Although investigations shall be conducted with sensitivity to confidentiality issues, investigative information shall be communicated as appropriate to those with a need to know, but only to those people. If the investigation indicates that a violation of this policy may have occurred, the investigator shall report to the Executive Board for timely and appropriate action.

A.6. Internet Policy

UUCT provides Internet access, including email, to its staff members to assist and facilitate church-related communications, data management and storage, and research. All materials, information, and software created, transmitted, downloaded or stored on the church computer system are the property of UUCT and may be accessed only by authorized persons.

Disciplinary action shall be taken if evidence is found that an employee has used the church's computer system inappropriately, such as:

- Transmitting obscene, harassing, offensive, or unprofessional messages.
- Accessing, displaying, downloading, or distributing any offensive or inappropriate materials, including those containing racial slurs, sexual connotation or offensive comments about race, color, religion, sex, sexual orientation, gender identity and expression, national origin, age, disability, or any other classification protected by law.
- Transmitting any of the church's confidential or proprietary information, such as, but not limited to, member or supporting friend data, for any purpose other than official church business.
- Violating software licensing or copyright agreements.
- Loading any new software programs onto a church computer without prior approval of the employee's supervisor.

A.7. Confidentiality

Employees may have access to confidential information about the church, including but not limited to information about members, supporting friends, or other staff members.

Such information must remain confidential and may not be released, removed from the church premises, copied, transmitted or in any other way used for any purpose by the employees outside the scope of their employment. All requests for information concerning past or present employees received from organizations or individuals should be directed to the Minister, to the employee's immediate supervisor, or to the President of the Executive Board.

A.8. Alcohol and Drug-Free Workplace

Staff of UUCT expect to work in an alcohol and drug-free environment, and the church expects its employees to be free from the effects of alcohol and drugs while on the job or in the workplace. The manufacture, distribution, dispensation, possession, or use of controlled substances (including the possession, sale, purchase, or consumption of alcohol) is prohibited, except as otherwise provided in this policy.

The possession and reasonable consumption of alcoholic beverages on church grounds by staff members may be permitted where the staff person is not serving in an official capacity as an employee of the church. Where permitted, the use of alcoholic beverages on church premises shall be considered a privilege and allowed only if consistent with state law. Drinking to excess resulting in behavior that could be considered inappropriate, offensive, disruptive, aggressive, or violent will be cause for disciplinary action or dismissal.

A.9. Church Policies

All employees are required to review and comply with the sections of the Bylaws and the *Manual of Policies and Procedures* relevant to their positions.

A.10. Employee Personnel Files

Employee personnel files shall be held in confidence by the Minister who shall consult with the employee when access to the file has been requested. Attachment 11 of this manual lists the items that should be in each employee's file.

A.11 Employee Use of Church Facilities

Employees may use church facilities for personal purposes, including for economic gain such as offering lessons, training, etc., in accord with the provisions of Section G.3.1 of the *Manual of Policies and Procedures*.

SECTION B. WAGE, HOUR AND JOB ADMINISTRATION

B.1. Staff Position Descriptions

Each paid position at UUCT shall have a Staff Position Description (see Attachments 14-18). These shall be updated by the Personnel Committee as needed and then reviewed and approved by the Minister, the immediate supervisor if other than the Minister, the employee, and the support team. Each staff position description shall indicate whether an employee is classified as permanent or temporary, salaried or hourly, and exempt or non-exempt (see Section B.5).

B.2. Hiring

Hiring of new staff shall follow the procedures developed by the Personnel Committee. These procedures are found in attachments to this Personnel Manual: Attachment 1 for regular, on-going positions and Attachment 3 for temporary and limited-hours positions (less than 5 hours per week).

B.3. Probationary Period

A new staff person may be terminated without cause during a probationary period of at least six months. During the first six months of employment, a new staff person shall meet regularly with the Minister and/or the employee's immediate supervisor to review expectations and performance. Prior to completion of six months of employment, the Minister and the support team shall conduct a formal review to determine potential for continued employment and ending or extending the probationary period.

B.4. Employment Eligibility Verification

To comply with federal immigration law, all employees at UUCT shall complete an I-9 Employee Eligibility Verification form which shall be kept in each employee's personnel file.

B.5. Employment Classifications

Regular full-time employees are those who are regularly scheduled to work 40 or more hours per week. Employees who are scheduled to work less than 40 hours per week are considered part-time employees, and their eligibility for benefits shall be pro-rated according to the percentage of full time worked, or as indicated for each specific benefit in their individual position descriptions.

Employees who are subject to state or federal minimum wage and overtime laws are referred to as "non-exempt" employees. Those in administrative, management, or supervisory positions, who are not subject to such regulations, are referred to as "exempt" employees.

B.6. Taxes

UUCT shall pay the employer's share of all federal employment (FICA) taxes and deduct the employee's share from paychecks. Any person who performs work for the church and earns the minimum in a calendar year set by federal law shall have FICA taxes deducted. IRS Publication 15, Circular E, published in January each year, shall be used to compute the required taxes.

B.7. Work Hours and Schedule

The total hours worked per week or month shall be specified in each individual Staff Position Description. Location of work and schedule of hours shall be mutually agreed upon between the employee and the Minister or her/his immediate supervisor if other than the Minister.

B.8. Timekeeping

Non-exempt employees must submit a written and signed record of their time worked each day to their supervisor. Limited-hours employees shall do so monthly. Other non-exempt employees shall do so every two weeks. Any scheduled hours not worked or time worked in excess of the employee's regular schedule must be noted.

B.9. Overtime and Time Off for Extra Hours Worked

Non-exempt employees shall not work more than 40 hours in any one work week without prior authorization from the Minister or the Minister's designee. Where such authorization is granted, the employee shall be paid time-and-a half for the overtime worked.

Non-exempt employees may be eligible for time off for extra hours worked on an 1-to-1 basis if they work more than their regular weekly hours, but no more than 40 hours in any one work week. Such time off may only be earned when the demands of the position require more than the allotted hours per week and when the employee obtains prior approval from his/her supervisor prior to working the extra hours. Time off for extra hours worked must be taken within 30 days unless otherwise approved by the Minister or the employee's immediate supervisor.

B.10. Volunteer Work

No employee shall be expected to nor should he or she perform any of the duties of his/her paid position as UUCT volunteer work, unless permission to do so is requested by the employee and agreed to by the Minister or his or her immediate supervisor.

B.11. Orientation

- a. By October 1 of each new fiscal year, lay leader support teams shall attend a joint meeting with the Minister and the Personnel Committee to introduce new team members to team responsibilities, share contact information, and update procedures for personal leave notification, etc.
- b. At the time of each new hire, the new employee, the Minister, the support team, and applicable committee(s) shall discuss and complete the Shared Responsibilities Grid in order to clarify roles. (See Attachment 12.) The completed grid shall be reviewed whenever there is a change in board member, committee chair, or Minister and revised if needed.

B.12. Church Membership and Participation

Employees and their family members may attend church events, including Sunday services, and their children may participate in the Youth RE program. Spouses and children 16 and over may be UUCT members. Regular employees may be supporting friends of the church but not members. Temporary employees and employees working five hours or less per week are exempt from this provision and may be members or supporting friends.

SECTION C. LEAVE AND VACATION POLICIES

C.1. General Leave Policy

All planned leave requests should be pre-approved by the Minister (or the lead Executive Board member of the employee's support team in the minister's absence) or by the immediate supervisor if other than the Minister (or designee for supervisor in supervisor's absence). If applicable, the staff member should then notify his/her support team about the planned leave.

Notification of personal leave (see Section C.3) should be given to the Minister or immediate supervisor (or to the lead support team member or supervisor designee in the absence of the Minister or supervisor).

If State of Florida offices are closed for a hurricane or other local or regional emergency, UUCT employees also should not report to work, or should leave work if closure occurs during the workday.

Each employee shall maintain a record of all leave time allocated and taken from July 1 to June 30 each fiscal year.

For the purpose of calculating leave, one "day" is defined as the annual average number of hours worked each day over a 5-day workweek by an employee; e.g. for an employee who is assigned to work 30 hours per week, one "day" = 6 hours: $(30/5)$. For an employee whose assignment includes different numbers of hours per week in some months of the year, the calculation will be adjusted proportionally. For example, for an employee who is assigned to work 30 hours per week for 9 months and 20 hours per week for 3 months, one "day" = 5.5 hours: $((30*9) + (20*3))/(12*5)$.

C.2. Vacation Leave

Employees who work regularly scheduled hours are allocated paid vacation at the beginning of each church fiscal year (July 1 - June 30) in the amount of 12 "days," i.e. one "day" per calendar month to be worked.

After five years, annual vacation time is allocated at a rate of 1 and 1/3 "days" per calendar month. After 10 years of employment, annual vacation time is allocated at a rate of 1 and 2/3 "days" per calendar month.

An employee whose employment terminates prior to the finish of a fiscal year shall have vacation days deducted from the total annual allocation at the rate of one "day" per calendar month not worked. If the employee has already used all of the vacation days allocated prior to termination, the pay for any vacation days taken beyond those earned per calendar month worked shall be deducted from the employee's final pay check.

Up to six "days" of vacation time may be carried over from year to year.

C.3. Personal Leave

Personal leave is to be used only in the event the employee is unable to work due to personal illness, injury, or other medical condition, or the illness, injury, death, or medical condition of a member of the employee's immediate family (defined as spouse/partner, child, parent, or sibling).

Paid Personal Leave—Employees who work more than five hours per week are allocated paid personal leave at the beginning of each church fiscal year (July 1 - June 30) in the amount of 12 "days," i.e. one "day" per calendar month to be worked. Paid personal leave may be carried over from year to year, up to a maximum of 30 "days."

Personal Leave Without Pay—With the approval of the Minister, employees who work 30 or more hours per week who have exhausted their vacation leave and paid personal leave may take up to two weeks' additional personal leave without pay per year. This time shall not be deducted from the basis in calculating paid vacation earned, health insurance premium payments, or contributions to the UUC Retirement Plan on the employee's behalf. However, any further approved unpaid leave shall be deducted from the basis.

C.4. Family Leave

Upon the birth or adoption of a child, an employee who works more than five hours per week may request approval by the Executive Board for up to 20 "days" of paid family leave. The employee may extend the leave by using accumulated paid personal leave and/or vacation leave days. Unpaid family leave of up to 30 "days" may be taken in addition to any paid or unpaid leave taken for the same or any other purpose.

C.5. Paid Holidays

Employees who work 30 or more hours per week receive the following paid holidays: New Year's Day, Martin Luther King Jr.'s Birthday, Memorial Day, Independence Day, Labor Day, Veterans' Day, Thanksgiving Day, Friday after Thanksgiving, Christmas Day. When a paid holiday falls on a weekend, the closest working day is considered the paid holiday.

C.6. Sabbatical Leave

- Persons in staff positions that are designated as "religious professional" (e.g. religious educators and musicians) shall become eligible for one month of paid sabbatical leave for each year of service after seven years of employment with UUCT. Sabbatical leave for persons who work less than full-time shall be pro-rated proportionally as their service compares to full-time service.
- General criteria for sabbatical requests: evidence that the individual will undertake studies or participate in activities/conferences/workshops related to his/her assigned duties at UUCT; clear explanation of how the sabbatical will enhance the quality of performance of the person's professional duties; and evidence that the majority of the sabbatical leave time will be spent on study, education, writing/creating, meditation, or other forms of professional or religious growth.
- The religious professional who is seeking a sabbatical shall first discuss the request with the Minister and her/his support team at least one year in advance. If

the response is positive, then a formal letter of request to the Executive Board should be prepared by the employee, outlining the proposed plan of study and activities to be undertaken during the sabbatical. The Minister, in consultation with the employee's support team, shall attach a statement regarding the programmatic and budgetary impact and feasibility of the proposed sabbatical, along with a clear statement of support. The Minister shall then present the plan and feasibility statement to the Executive Board for a vote.

- The person who is granted sabbatical leave shall acknowledge a moral obligation at the termination of the leave to return to UUCT for a period of service of not less than one year.

SECTION D. EMPLOYEE BENEFITS

D.1. Health Insurance

UUCT shall reimburse employees who work 750 hours or more a year for up to 80 percent of their health insurance premiums, as documented by the employee in January of each year, pro-rated as a percentage of time worked compared to a full-time (40 hours per week). UUCT shall use the UUA Health Plan as a benchmark. If an employee chooses an alternative health insurance plan, UUCT shall cover the employee's premiums under the current formula so long as those costs are no greater than those for individual coverage under the UUA Health Plan.

D.2. Other Health-Related Benefits

UUCT shall offer life insurance, dental insurance, and long-term disability insurance to employees who work 750 hours or more a year, through enrollment in the UUA-sponsored plans. Premiums for coverage shall be paid by the employee.

D.3. Workers' Compensation Insurance

UUCT shall maintain a Workers' Compensation Insurance policy to protect employees in case of on-the-job injuries, if the church employs four or more full or part-time workers, as required by Florida law. A copy of the insurance document shall be retained from the Treasurer and shall be given to any employee upon request.

D.4. Retirement Plan

Church employees who have worked for UUCT for 1,000 or more hours for one consecutive 12-month period (including paid vacation and other non-worked paid time) and are at least 18 years of age shall be eligible for employer contributions to the Unitarian Universalist Organizations Retirement Plan. They also may make supplemental, voluntary, tax-deferred contributions. Church employees who are at least 18 years of age and who work less than the 1,000 hour annual minimum may enroll in the Plan and make tax-deferred voluntary contributions. Contributions to the plan by UUCT, as well as voluntary contributions by the employee shall be governed by UUCT's most recently adopted Employer Participation Agreement with the UUA. The compensation base shall be the employee's annual salary and shall not be reduced when the employee takes approved unpaid leave.

D.5. Professional Expenses

If included in the annual budget, money may be allocated to reimburse both full and part-time religious professionals, and other employees as appropriate, for IRS-allowed professional expenses, such as local mileage, out-of-office travel expenses, and lodging and registration fees to attend professional trainings and meetings. Out-of-office meetings and trainings must be pre-approved by the Minister or the employee's immediate supervisor. Procedures for reimbursement shall follow the Accountable Reimbursement Plan (*Manual of Policies and Procedures*, Policy H.1.14).

D6. Annual Letters of Rehire

Prior to the start of each fiscal year, and whenever any changes to salary or other compensation are implemented, the Personnel Committee chair shall prepare for the President's signature a letter for each paid staff member, detailing salary, deductions, net pay, and other salary-related details. The Personnel Committee chair shall provide a copy of the letter of rehire to the VP for Finance. Attachments 6 and 7 provide templates for letters of rehire for regular and limited-hours positions.

SECTION E. STAFF PERFORMANCE REVIEWS

E.1. Performance Expectations

The employee and the Minister or immediate supervisor shall set annual goals for each fiscal year and then monitor and assess performance in terms of the goals at designated times during the year. Each employee shall receive a copy of the final Annual Assessment document.

The major purpose of this annual process is to be a tool for dialogue to reach a mutual understanding between the employee and the Minister or immediate supervisor about responsibilities, expectations, and specific goals for the coming year. For limited-hours positions (less than 5 hours per week), such as childcare providers, a simpler annual performance review shall be conducted following the same overall timetable as for other staff.

SECTION F. RESOLUTION OF COMPLAINTS

F.1. Resolution of an Employee Complaint

- a. Generally an employee shall first approach her/his supervisor about any work-related problem.
- b. If resolution is not achieved with the immediate supervisor and the immediate supervisor is not the Minister, the employee may then approach the Minister.
- c. If the employee finds that the problem is not being resolved, a grievance shall be put in writing and submitted to the Chair of the Personnel Committee with copies distributed simultaneously to the Minister and immediate supervisor if other than the Minister. The decision of the Personnel Committee shall be final, with a report filed in the grievance section of the locked, UUCT personnel files.

- d. To the best of its ability, UUCT shall address and solve problems quickly, fairly, and where possible or necessary, confidentially. Each step in the grievance process may take up to, but no more than, ten days: 5 days for making a complaint and 5 days for making a decision at each level.

F.2. Resolution of a Complaint by a Congregant to a Staff Member

- a. If a congregant makes a complaint to a staff member about that staff member's performance, the staff member and congregant shall first seek resolution between themselves using the guidelines in the Covenant of Right Relations.
- b. If either the congregant or the staff person finds that resolution has not been achieved, that person may refer the issue to the Minister or the staff person's immediate supervisor, if other than the Minister, by outlining the problem in writing.
- c. If either party finds the issue is not resolved by the action of the Minister or the immediate supervisor, that person may seek a review by the Committee on the Ministry by applying to the chair of that committee.
- d. To the best of its ability, UUCT shall address and solve problems quickly, fairly, and where possible or necessary, confidentially.

SECTION G. TERMINATION OF EMPLOYMENT

G.1. Termination of Employment

Either UUCT or the employee may terminate employment upon 14 days written notice with the exception that UUCT may terminate employment immediately in cases of serious cause as determined by the Executive Board (e.g. theft or dishonesty, falsifying records or information, misappropriation of funds, other malfeasance). Employees who resign with at least 14 days written notice may receive payment for their vacation leave balance (i.e., the current year's unused, accrued vacation time; plus any vacation time carried over from the prior year; minus any vacation time deducted for the calendar months not worked, per Section C.2 of this manual). Accrued paid personal leave and accrued sabbatical time shall not be paid.

G.2. Termination Procedures

If the departing employee agrees, an exit interview shall be conducted by the chair of the Personnel Committee or a designee. Specific procedures to be followed upon the departure of an employee are detailed in Attachment 8 of this Personnel Manual along with an Exit Interview Form (Attachment 9) and an Employee Separation Form (Attachment 10). Copies of the completed exit interview and separation forms shall be placed in the employee's personnel file.

Attachment #1
PROCEDURES FOR HIRING NEW PERSONNEL:
REGULAR, ON-GOING POSITIONS

Revised April 2016

Note: See separate hiring procedures for temporary and limited-hours positions.

Step 1 – Obtain Executive Board Authorization

Minister or applicable Board member puts following items on agenda:

- Authorization to advertise for and fill position according to an appropriate time line.
- Designation of a salary range in consultation with the Personnel Committee Chair, VP for Finance and Minister, based on UUCT Compensation Criteria.
- Recommendation on number and composition of search committee (SC). Committee shall consist of:
 - Minister and Personnel Committee representative as non-voting members,
 - Five to seven voting members including the lay leader support team or their designees and others representing the diversity of the congregation.
 - Wherever appropriate, youth shall be appointed as non-voting members.
- Authorization to spend money to advertise position.

Step 2 – Search Committee Meets for Planning

The Search Committee:

- Develops ad and recruitment job description based on official staff position description obtained from Personnel Committee.
- Sets timetable for advertising, interviewing and filling position.
- Designates persons responsible for each major task.
- Determines whether other applicable committees shall be asked to review and approve candidates for interview and/or final candidate(s).
- When appropriate, consults UUA procedures and resources.

Step 3 – Search Committee Initiates Recruiting and Advertising Process

- In advertisements for the position, all applicants shall be asked to submit a resume to the attention of the Search Committee chair, with a cover letter stating why they are interested in the position.
- Recruitment in-house should be done through *The Meridian*, Sunday written and verbal announcements, and flyers posted at the church.
- Recruitment in the community and beyond should be done through researching advertising alternatives and using as many as are affordable and available to reach diverse populations. Possibilities include but are not limited to:
 - Posting of ads in applicable departments at TCC, FSU and FAMU, and in such places as Family Tree, United Church of Tallahassee, Society of Friends, New Leaf Market, bookstores and coffee shops, etc.
 - The greater UU community - churches within the FL District and beyond
 - Local publications aimed at minority communities,
 - Tallahassee Democrat (print and/or online) and local alternative publications
 - UUCT website and Facebook page

Step 4 – Search Committee Reviews and Screens Application Letters & Resumes

- The Chair of the SC receives application letters and resumes and distributes them to other members of the committee at the appropriate time.
- As application letters and resumes are received, the Chair of the SC (or her/his designee) notifies all applicants by email or letter that their materials have been received.
- To screen and select applicants to be interviewed, specific criteria should be developed, using the position description as a baseline, in particular the knowledge, skills and abilities (KSAs) section. Other criteria may be added if deemed important by the committee.
- Where a college or graduate degree is a criterion for eligibility or ranking, applicants should be required to submit an official transcript.
- It is recommended that the SC develop a spreadsheet listing the criteria on one axis and the applicants on the other, to determine which ones come closest to meeting all of the criteria. This helps in screening applicants and selecting those to be interviewed.
- The criteria should be applied consistently to all applicants.
- Especially if a large number of applicants are anticipated, the SC may decide in advance to empower the chair to pre-screen applicants into categories: does not meet criteria, may meet criteria, and clearly does meet criteria. Once the pre-screening is done, the chair should then notify applicants who do not meet the criteria that they shall not be considered for the position.
- Once the closure deadline has been reached, the SC meets to review all of the applicants (or to review those who have been pre-screened as meeting or possibly meeting the criteria) and selects those to be interviewed.
- When there is an insufficient pool of applicants, the SC shall seek Board approval to extend the application deadline and spend additional funds for advertising.

Step 5 – Search Committee Conducts Interviews

- From the criteria, the SC develops a list of interview questions and decides which committee member will ask which questions. For some positions, such as Office Administrator, applicants may be asked to perform certain tasks such as proofreading, demonstration of computer proficiency, handling difficult phone calls or visitors, etc.
- The Chair of the SC notifies interviewees of the date, time, and length of their interviews and provides the *Employment Application* and *Authorization and Request for Background Investigation* forms for them to complete and bring to the interview. (Note: See end of this attachment for forms, which are also available electronically from the Personnel Committee.)
- All interviews should follow a similar format and all questions and tasks (if any) should be asked of all applicants.
- A suggested format for the interview is:
 - Chair of SC welcomes applicant, gives a brief overview of the position, and explains how the interview shall be conducted and what tasks (if any) shall be required.
 - Applicant is asked to make a brief statement about why he/she applied and how he/she sees him/herself contributing to the mission and vision of the church.
 - Members of SC ask pre-determined questions and take written notes on the responses.
 - Applicant performs tasks (if any).

- Applicant is given chance to ask questions.
- Chair of SC thanks applicant and may also elaborate further on the position, e.g. relationship with Minister, other staff, support team and other lay leaders, key committees and congregation in general; any requirements related to being present Sundays and having UUCT office hours; and background investigation (including a criminal background check) requirement for hires.
- SC describes the hiring process including the Board's role as final authority in hiring.
- Salary discussions should be confined to stating the minimum salary for the position and describing where the candidate's qualifications fit in the UUCT Compensation Criteria. There should be no further discussion of salary until such time as an employment offer is made.

Step 6 – Search Committee Selects Applicant to Recommend for Hiring

- Once all interviews are completed and if there are sufficient viable candidates, the SC meets to rank them in terms of the knowledge, skills and abilities needed for the job using the objective criteria spreadsheet.
- The SC then decides:
 - which applicants to consider as finalists, or which applicant to consider as the finalist;
 - or if there is only one applicant, whether to consider that person as the finalist;
 - or if no applicants meet the selection criteria, whether to extend the search process and advertise for more applicants.
- Hiring recommendations should be reached by consensus whenever possible or by majority vote if consensus is not reached.
- When one or more finalists are selected, the SC decides which members shall contact the references given, using the *Reference Check by Telephone* form. (Note: See end of this attachment for form, which is also available electronically from the Personnel Committee.)
- The SC meets again following the reference checks to decide on a recommendation for hire, or if there is only one finalist, the SC may empower the chair to proceed with making a recommendation for hire if all reference checks are positive. (If only one finalist and any of the reference checks are negative, the SC should meet again and decide how to proceed.)
- Once a decision has been reached by the SC, none of the candidates should be contacted until the Board has acted on the recommendation.

Step 7 – Search Committee Chair Recommends to Executive Board

- The Chair prepares the recommendation to hire which should cover the following information and be sent to the President for distribution to the Board.
 - An introduction (if needed) stating the date requested for Board approval, when the position was or is being vacated, and when it is hoped the new staff person can begin.
 - A recommendation worded as a motion for the Board: "That (name) be hired as UUCT (position) as of (date), for (number of, or an average number of) hours per week (or month) at a salary of \$____ per year (or \$____ per hour). Employment would be provisional pending a clear background investigation (including a criminal background check), which shall be requested as soon as the Board approves the hire. The first six months shall be a probationary period."
 - Specific reasons for recommending this applicant and salary.

- A list of SC members, including their staff or volunteer positions.
- The Chair of the S C should provide the following information to the Board for the board meeting where the recommendation to hire is considered.
 - A brief summary of information on applicant including education and paid, volunteer and life experience.
 - A brief summary of the recruitment process: How position was advertised, what the application deadline was, how the interviews were conducted, and any other pertinent information.
 - A brief summary of information gathered from reference checks.
 - The applicant's cover letter, resume, and any other materials submitted.

Step 8 – Search Committee and Minister Follow-up

- Once the Board has approved the hire and the salary, the SC Chair contacts the candidate with the offer. If the offer is declined due to salary, the SC Chair shall determine the minimum salary the candidate will accept and then contact the Board President, who shall convene the Board to consider an alternate offer.
- Once the candidate has accepted an offer, the Chair of the SC sends notification by email or letter to the interviewees who were not selected letting them know that the position has been filled.
- The SC Chair or designee notifies the VP for Finance and the Personnel Committee chair about the new hire and asks the Personnel Committee chair to prepare a Letter of Hire for the Board President's signature, specifying the starting date and salary details. The new hire signs and returns the letter if the offer of employment is accepted, and the Minister files the original letter in the employee's personnel file. (See Attachment 2 of this manual for Letter of Hire Template for Regular Positions.) A new employee shall be eligible to receive the amount budgeted for the fiscal year for professional expenses on a pro-rated basis.
- The SC Chair initiates the background investigation by contacting the Office Administrator, who will submit the background screening request as per the procedures in Section 6 of the Safety Policy (see Appendix 7 to the Manual of Policies and Procedures).
- The Minister shall ensure that the employee completes the necessary paperwork, i.e. *Paychex Direct Deposit Enrollment/Change Form*, *IRS Form W-4 Employee Withholding Allowance Certificate*, *USCIS Form I-9 Employment Eligibility Verification*, and *Staff Contact & Emergency Information Form* (Attachment 13).
- The Minister (or in the Minister's absence, the lead board member from the applicable support team, along with the chair of the Personnel Committee) should review the following with the new hire: terms of employment, position description, supervision and support, *Staff Personnel Manual*, *Manual of Policies and Procedures*, guidelines for UUCT paid and volunteer time, and UUCT performance review process, including a probationary period.
- If programmatic committees have other documents to share with the new staff person, these should be given to the new staff person separately.
- The Minister shall meet with the new staff member, the support team, and appropriate committee members to complete the Shared Responsibilities Grid. (See Attachment 12.)

General Guidelines

- The SC is responsible for giving the Executive Board general status reports on progress in filling the position.
- Details regarding the search, including names of applicants, shall remain confidential.

Forms to be Used in Hiring Process (see following pages)

- *Employment Application* form
- *Authorization and Request for Background Investigation* form
- *Reference Check by Telephone* form

EMPLOYMENT APPLICATION

APPLICANT INFORMATION

Name (Last)	(First)	(Middle)	Date
Address		City	State ZIP Code
Telephone	Alternate Telephone	Best Contact Time	E-Mail Address
Date of Birth			
Position Applied For		Type of Work Desired <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Temporary/Contract	
When are you available to begin work?			
If hired, can you provide evidence that you are authorized and of legal age to work in the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No			
In Case of Emergency Notify		Telephone	Name of Nearest Relative Telephone

EDUCATION

TYPE	SCHOOL NAME / LOCATION	COURSE OF STUDY	NO. YEARS ATTENDED	DEGREE / DIPLOMA
HIGH SCHOOL				
BUSINESS / TECHNICAL				
COLLEGE				
GRADUATE				
OTHER				

Professional Organizations:	
First-Aid Training? <input type="checkbox"/> Yes <input type="checkbox"/> No	Date Completed
CPT Training? <input type="checkbox"/> Yes <input type="checkbox"/> No	Date Completed

EMPLOYERS

(List all jobs and contracts held by you during the past five continuous years)

CURRENT EMPLOYER

Company Name	Telephone		
Address	City	State	ZIP Code
Position Held	From	To	
Reason for Leaving	Supervisor		

PREVIOUS EMPLOYER

Company Name	Telephone		
Address	City	State	ZIP Code
Position Held	From	To	
Reason for Leaving	Supervisor		

PREVIOUS EMPLOYER

Company Name	Telephone		
Address	City	State	ZIP Code
Position Held	From	To	
Reason for Leaving	Supervisor		

PREVIOUS EMPLOYER

Company Name		Telephone	
Address	City	State	ZIP Code
Position Held	From	To	
Reason for Leaving		Supervisor	

PREVIOUS EMPLOYER

Company Name		Telephone	
Address	City	State	ZIP Code
Position Held	From	To	
Reason for Leaving		Supervisor	

MILITARY STATUS

Have You Served in the U.S. Armed Forces? <input type="checkbox"/> Yes <input type="checkbox"/> No	Branch	State	Date	End Date
Rank/Rate at Discharge	Type of Service	Type of Discharge		
Special Training/Experience Received in the U.S. Armed Services		Draft Status	Reserve Status	

REFERENCES (include at least two that have supervised you as an employee or volunteer):

Name	Address	Phone	Occupation	Relationship
Name	Address	Phone	Occupation	Relationship
Name	Address	Phone	Occupation	Relationship

APPLICANT STATEMENT

(Read and Sign Below)

I certify that this employment application was completed by me and that all of the information on this application is true and correct to the best of my knowledge. I understand that any falsification, misrepresentation, or omission of facts called for herein will result in my disqualification from further consideration or dismissal from employment if I am hired. I have reviewed the *Authorization and Request for Background Information* form and acknowledge that I understand the terms set forth therein. I understand that this employment application is not valid without my signature.

Print Name	
Signature	Date

By checking this box I give you permission to contact all references and supervisors listed in this application except for:	<input type="checkbox"/>
---	--------------------------

AUTHORIZATION

I hereby authorize the *Unitarian Universalist Church of Tallahassee ("UUCT")* to make an independent investigation of my background by obtaining a consumer report relating to me from *Mind Your Business, Inc. ("MYB")*. I understand and agree that the information contained in any consumer report will be used to determine eligibility for employment and, if I am hired, my eligibility for continued employment, and that action may be taken by *UUCT* based on this information.

I further authorize any person, business entity or governmental agency who may have information relevant to the above to disclose the same to *UUCT* by and through *MYB*, including but not limited to, any courthouse, any public agency, any and all law enforcement agencies and any and all credit bureaus, regardless of whether such person, business entity or governmental agency compiled the information itself or received it from other sources, *including alcohol and controlled substance information from previous employers.*

Full Name (Printed) _____
 First Middle Last Maiden/Other

Signature _____ Date _____

REFERENCE CHECK BY TELEPHONE

Name of applicant:
Position under consideration:
Name of person called for reference check:
Phone number of person called:

Interview questions (supplement with additional questions specific for the position):

Verify position last held:	From (date):	To (date):
How long have you known the applicant?		
How well do you know the applicant?		
In what capacity have you known the applicant?		
How would you describe her/his general personality?		
What specific duties did s/he perform?		
How would you describe her/his performance (e.g. attendance, honesty, creativity, ability to perform independent work, supervisory abilities)?		
How did s/he get along with other employees?		
What were the circumstances under which s/he left your organization?		
Would you rehire her/him?	Y <input type="checkbox"/>	Any qualifications?
	N <input type="checkbox"/>	Why?
What were her/his strong points?		

What were her/his weak points?
How would you describe her/his leadership abilities/potential?
How would you describe her/his ability to relate to children and/or youth?
Do you know of any characteristics or circumstances that would negatively affect her/his ability to work with children or youth? If so, please describe.
Do you have any knowledge that s/he has ever been convicted of a crime? If so, please describe.
Is there any other information you would like to share with me?

Notes regarding the reference:

The person called was:	Cooperative <input type="checkbox"/>	Uncooperative <input type="checkbox"/>
	Well informed <input type="checkbox"/>	Hesitant to answer <input type="checkbox"/>
Other notes regarding the interview:		

Reference inquiry completed by:

Print name:	
Signature:	Date:

Attachment #2
LETTER OF HIRE TEMPLATE FOR REGULAR POSITIONS
Revised February 2017

Date

Name & Address

Dear _____,

The Unitarian Universalist Church of Tallahassee is pleased to offer you the position of _____ beginning _____.

You will be hired to work _____ [text] (____) [numeric] hours per week at a rate of \$_____ per hour, which is \$_____ annualized. Your monthly salary will be \$_____ for the remainder of the current fiscal year, which ends June 30. [If applicable also include the following: For the new fiscal year beginning July 1, you will work _____ (____) hours per week at a rate of \$_____ per hour, \$_____ annualized.] Your hire will be provisional pending a clear background investigation (including a criminal background check). The first six months of employment are an initial probationary period. Hours and rate of pay for future fiscal years will be confirmed once the annual operating budget is approved by the congregation at the end of May.

As indicated in the position description, this is a non-exempt, part-time position. _____ [name], is Payroll Officer for the church and will assure that your paycheck is directly deposited into your bank account at the end of each month. To activate direct deposit of your paycheck, you should fill out the Paychex *Direct Deposit Enrollment/Change Form* and attach a voided check. You also should complete IRS Form W-4 *Employee Withholding Allowance Certificate*. You can obtain copies of these forms from our Office Administrator, _____ [name]. Please submit the completed forms and voided check to _____ [Office Administrator] who will distribute copies to the Minister and Payroll Officer.

Federal law requires that you complete two additional forms: IRS Form W-9 *Request for Taxpayer Identification Number and Certification* and USCIS Form I-9 *Employment Eligibility Verification*. Please also fill out a copy of UUCT's *Staff Contact & Emergency Information Form*. You may obtain copies of these three forms from our Office Administrator as well. Once you have completed these forms, please return them to the Office Administrator for filing. Please update the *Staff Contact & Emergency Information Form* as necessary.

As part of your employment, we offer you:

- Monthly reimbursement for 80% of your health insurance premiums, allocated between your regular semi-monthly paychecks, prorated by the percent of full-time that you are working, i.e. $\frac{__}{40} = 0.__ [do\ the\ math\ and\ fill\ in\ the\ blanks]$. To receive this reimbursement, you must provide our Treasurer, _____ [name], a copy of your most recent health insurance premium statement. If you are currently covered under a spouse's or partner's health insurance, you must provide documentation of the amount of the monthly premium that is for your coverage.
- [if applicable] \$_____ [pro-rated] for professional expenses for the remainder of the current fiscal year [if applicable add: and \$_____ for the upcoming fiscal year], reimbursable according to the church's adopted Accountable Reimbursement Plan (*Manual of Policies and Procedures*, Policy H.1.14). Rev. _____ [the minister] can explain the procedures and forms used for claiming expenses under this plan.

- [For employees working 1000 or more hours per year] After you have been employed with UUCT for 1,000 or more hours for one 12-month period in this ___ hr/week position, you will be eligible for enrollment in the Unitarian Universalist Organizations (UUCU) Retirement Plan, with a tax-deferred contribution of 10% of your salary paid by the church. You also may make additional voluntary contributions (elective deferrals) to the plan from your salary up to a maximum amount indicated in the UUCU Retirement Plan Annual Plan Notice. If you wish to do so, please notify our Payroll Officer, _____ [name]. You can obtain copies of the detailed UUCU plan and Annual Plan Notice, as well as a summary, from the UUA website at www.uua.org/retirement, or by contacting the UUCU Retirement Plan Director at (617) 948-4265 or retirementplan@uua.org. You can obtain a copy of UUCT's Employer Participation Agreement from Rev. _____ [the minister].
- [For employees working 750 or more hours per year] If you choose, you also may enroll in the UUA plans for life insurance, dental insurance, and long-term disability insurance, with premiums to be paid by you. If you are interested, the Minister can explain these programs.
- Other benefits as detailed in the position description and *Staff Personnel Manual* which accompany this letter. If you accept our offer, please familiarize yourself with them.

ACCEPTANCE: If you accept this offer, please sign and date below, make yourself a copy, and return this original to the Personnel Committee chair, _____.

Let me offer my congratulations to you and extend a heartfelt welcome to our church staff.

Sincerely,

_____,
Executive Board President

Signature of acceptance: _____ Date: _____

cc: Rev. _____ [minister]; _____ [immediate supervisor if applicable];
_____, Payroll Officer; _____, Treasurer

Attachment #3
PROCEDURES FOR HIRING TEMPORARY
AND LIMITED-HOURS PERSONNEL

Revised April 2016

Note: Limited-hours personnel are those working five hours per week or less.

Step 1 – Obtaining Executive Board Authorization

Minister or applicable Board member puts following items on agenda:

- Authorization to advertise for and fill position according to an appropriate time line.
- Designation of number of hours to be worked, an hourly rate and duties of the position in consultation with the Personnel Committee Chair, VP for Finance and Minister, based on appropriate qualifications and experience.
- Recommendation for the person who will recruit, screen, and interview applicants and select a candidate to recommend for hiring. This person may be the Minister or another staff member, a member of the support team for the position (board member or committee chair), or the Personnel Committee chair. (If the designated person is not the Minister, then the Minister shall be updated and consulted during the hiring process, as appropriate and needed, and the Personnel Committee shall be available as a resource on policies, process and procedures.)
- Authorization to spend money to advertise position, if needed.

Step 2 – Recruiting and Advertising Process

- In advertisements for the position, all applicants shall be asked to submit a resume to the attention of the designated person, with a cover letter stating why they are interested in the position.
- Recruitment in-house should be done through *The Meridian*, Sunday written and verbal announcements, and flyers posted at the church.
- If needed, recruitment in the community and beyond should be done through researching advertising alternatives and using as many as are affordable and available to reach diverse populations. (For advertising possibilities, see Attachment 1 – Step 3 of Procedures for Hiring New Personnel: Regular, On-going Positions.)

Step 3 – Interviewing

- Based on the duties of the temporary position and in consultation with others, as needed, the designated person should develop a brief set of criteria for screening applications for the purpose of deciding who to interview.
- Those selected for interviewing should be interviewed using the same set of questions, based on the knowledge, skills and abilities (KSAs) needed for performing the duties of the job, as well as any KSAs which might be preferred but not required.
- Prior to their interviews, applicants should be given the *Employment Application* and *Authorization and Request for Background Investigation* forms to complete and bring to the interview. (Note: See end of Attachment 1 for forms, which are also available electronically from the Personnel Committee.)
- The interview should include:
 - A brief overview of the position, with an opportunity for the applicant to ask questions.

- Important details regarding the position, e.g. relationship with Minister, other staff, lay leaders, key committees and congregation in general; and any requirements related to being present Sundays and having UUCT office hours.
- A description of the hiring process including the Board's role as final authority in hiring.
- If desired, the designated person may involve others from UUCT in the interviewing.
- When there is an insufficient pool of applicants, the designated person shall extend the application deadline and do further advertising, securing approval to do so as needed.

Step 4 – Decision & Recommendation to Board

- Once all interviews are completed, the designated person makes a decision on which applicant to recommend for hiring. This should be done in consultation with the Minister and other staff and/or lay leaders, as appropriate. For a temporary position, references may be checked if deemed to be helpful in reaching a decision. For a limited-hours, on-going position, references should be checked on the applicant to be recommended for hire, using the *Reference Check by Telephone* form. (Note: See end of Attachment 1 for form, which is also available electronically from the Personnel Committee.)
- The designated person prepares the recommendation to hire which should cover the following information and be sent by the Board member overseeing the position to the President for distribution to the full Board.
 - A recommendation worded as a motion for the Board: "That (name) be hired as UUCT (name of temporary or limited-hour position) as of (date), for (number of, or an average number of) hours per week (or month) at a salary of \$____ per year (or \$____ per hour) through (end date if temporary position). [The recommendation should include the following sentence for any temporary or limited-hour position involving contact with children.] Employment would be provisional pending a background investigation (including a criminal background check), which shall be requested as soon as the Board approves the hire."
 - Very briefly, the specific reasons for recommending this applicant.

Step 5 – Follow-up

- Once the Board has approved the hire, the designated person contacts the candidate with the offer.
- Once the candidate has accepted the offer, the designated person sends notification by email or letter to the interviewees who were not selected letting them know that the position has been filled.
- The designated person initiates the background investigation by contacting the Office Administrator, who will submit the background screening request as per the procedures in Section 6 of the Safety Policy (see Appendix 7 to the Manual of Policies and Procedures).
- The designated person notifies the VP for Finance and the Personnel Committee chair about the new hire and asks the Personnel Committee chair to prepare a Letter of Agreement for temporary employees (see Attachment 4) or Letter of Hire for limited-hours employees (see Attachment 5) for the Board President's signature specifying the start and end dates, hourly rate, and scope of services. The employee signs and returns the letter if the offer of employment is accepted, and the Minister files the original letter in the employee's personnel file.
- The Minister or the immediate supervisor shall ensure that the employee completes the necessary paperwork, i.e. *Paychex Direct Deposit Enrollment/Change Form*, IRS Form

W-4 Employee Withholding Allowance Certificate , USCIS Form I-9 Employment Eligibility Verification, and Staff Contact & Emergency Information Form (Attachment 13).

- The Minister or the immediate supervisor should review the following with the new hire, as applicable to the position: terms of employment, position description, supervision and support, *Staff Personnel Manual, Manual of Policies and Procedures*, guidelines for UUCT paid and volunteer time, and UUCT performance review process.
- The Minister or the immediate supervisor shall determine what training may be needed and what, if any, transitioning is possible.

Attachment #4
LETTER OF AGREEMENT TEMPLATE FOR TEMPORARY POSITIONS
Revised April 2016

Unitarian Universalist Church of Tallahassee
Letter of Agreement

The UUCT Executive Board (the Board), for and on behalf of the Unitarian Universalist Church of Tallahassee, Florida Inc.(UUCT), a non-profit corporation of the State of Florida, and _____ [employee] agree:

1. The Board is in need of the services of a temporary _____ [position] on a _____ [full or part-time] basis.
2. You are qualified to perform such services and hereby agree to do so under the following terms and conditions:

Period of Performance: _____ [start date] through _____ [end date] [if needed, add the following: and possibly continuing through _____ [final end date]].

1) Prior to the start date, there will be a training period for approximately ____ hours during the period of _____ through _____ [dates] for which you will be paid at the hourly rate. [Delete this provision if not applicable.]

2) Beginning _____ [start date], you will work ____ hours per week from _____ [time] to _____ [time] _____ [day or days of the week]. [Delete "Beginning _____" if there is no prior training period.]

Scope of Services: You agree to work cooperatively with the Board, under the oversight of the Minister [or give title of immediate supervisor if not the minister] to provide _____ [clerical, office, childcare, musical accompaniment, etc.] services such as _____ [list all regular duties temporary employee will have].

Supervision: You will report to the Minister [or give title of immediate supervisor if not the minister] [if applicable, include the following: and will also work closely with the following lay leader support team: _____ [give UUCT positions]]. It is understood that for some specific tasks you will work directly with the appropriate volunteer or lay leader.

Payment of Salary: The church will pay you \$____ per hour, gross with no additional benefits. Your paycheck will be directly deposited into your bank account at the end of each month by the UUCT Payroll Officer, _____. To activate direct deposit of your paycheck, you should fill out the Paychex *Direct Deposit Enrollment/Change Form* and attach a voided check. You also should complete IRS Form W-4 *Employee Withholding Allowance Certificate*. You can obtain copies of these forms from our Office Administrator, _____. Please submit the completed forms and voided check to _____ [Office Administrator] who will distribute copies to the Minister and Payroll Officer.

Federal law requires that you complete two additional forms: IRS Form *W-9 Request for Taxpayer Identification Number and Certification* and USCIS Form *I-9 Employment Eligibility Verification*. Please also fill out a copy of UUCT's *Staff Contact & Emergency Information Form*. You may obtain copies of these three forms from our Office Administrator as well. Once you have completed these forms, please return them to the Office Administrator for filing. Please update the *Staff Contact & Emergency Information Form* as necessary.

[For temporary positions involving direct contact with children and youth, add the following:]
Provisional Hire: Your temporary hire is provisional pending a clear background investigation (including a criminal background check).

Termination: Either party may terminate this agreement at any time with or without cause upon 14 days written notice.

Acceptance of Agreement

President of UUCT Executive Board

Employee

Date:_____

Date:_____

cc: Rev. _____ [minister]; _____ [immediate supervisor if applicable];
_____, Payroll Officer; _____, Treasurer

Attachment #5
LETTER OF HIRE TEMPLATE FOR LIMITED-HOURS POSITIONS
July 2016

Note: Limited-hours personnel are those working five hours or less per week.

Date

Name & Address

Dear _____,

The Unitarian Universalist Church of Tallahassee is pleased to offer you the position of _____ beginning _____.

You will work as scheduled by _____ [title and name of immediate supervisor]. Although some seasons/weeks may require more or less work, over the year, this position will average ___ to ___ hours per week. You will be hired to work at a rate of \$____ per hour for the remainder of the current fiscal year, which ends June 30, _____. [If applicable also include the following: For the new fiscal year beginning July 1, you will work _____ (___) hours per week at a rate of \$_____ per hour.] Hours and rate of pay for future fiscal years will be confirmed once the annual operating budget is approved by the congregation at the end of May.

Your hire will be provisional pending a clear background investigation (including a criminal background check). The first six months of employment are an initial probationary period.

As indicated in the position description, this is a non-exempt, part-time, limited-hours position. _____ [name], is Payroll Officer for the church and will assure that your paycheck is directly deposited into your bank account at the end of each month. To activate direct deposit of your paycheck, you should fill out the Paychex *Direct Deposit Enrollment/Change Form* and attach a voided check. You also should complete IRS Form W-4 *Employee Withholding Allowance Certificate*. You can obtain copies of these forms from our Office Administrator, _____ [name]. Please submit the completed forms and voided check to _____ [Office Administrator] who will distribute copies to the Minister and Payroll Officer.

Federal law requires that you complete two additional forms: IRS Form W-9 *Request for Taxpayer Identification Number and Certification* and USCIS Form I-9 *Employment Eligibility Verification*. Please also fill out a copy of UUCT's *Staff Contact & Emergency Information Form*. You may obtain copies of these three forms from our Office Administrator as well. Once you have completed these forms, please return them to the Office Administrator for filing. Please update the *Staff Contact & Emergency Information Form* as necessary.

As part of your employment, we also offer you:

- The option to make voluntary contributions (elective deferrals) to the UUC Retirement Plan from your salary up to a maximum amount indicated in the UUC Annual Plan Notice. If you wish to do so, please notify our Payroll Officer, _____ [name]. You can obtain copies of the detailed UUC plan and Annual Plan Notice, as well as a summary, from the UUA website at www.uua.org/retirement, or by contacting the UUC Retirement Plan Director at (617) 948-4265 or retirementplan@uua.org. You can obtain a copy of UUCT's Employer Participation Agreement from Rev. _____ [the minister].
- Workers' compensation insurance.

ACCEPTANCE: If you accept this offer, please sign and date below, make yourself a copy, and return this original to the Personnel Committee chair, _____.

Let me offer my congratulations to you and extend a heartfelt welcome to our church staff.

Sincerely,

_____,
Executive Board President

Signature of acceptance: _____ Date: _____

cc: Rev. _____ [minister]; _____ [immediate supervisor if applicable];
_____, Payroll Officer; _____, Treasurer

Attachment #6
LETTER OF REHIRE TEMPLATE FOR REGULAR POSITIONS
Revised July 2016

Date

Name & Address

Dear _____:

The Unitarian Universalist Church of Tallahassee is pleased to notify you that you have been re-hired for the _____ fiscal year in the position of _____.

You are hired to work _____[text] (___) [numeric] hours per week (_____ hrs per year) at an annual salary of \$_____ for the fiscal year ending June 30, _____. You should not work more than 40 hours in any one work week without authorization from _____ [minister] or her[his] designee. Where such authorization is granted, the church is required under federal law to pay time-and-a half for the overtime worked.

If you wish to change your exemptions or increase your federal withholding amount, please complete a new W-4 and turn it in to _____, our Payroll Officer.

You are entitled to a total of ___ hours of paid vacation over the _____ fiscal year, based on the rate of 0.____ hour per ___-hour week worked. You may begin using that vacation allocation immediately. However, if your employment with UUCT should terminate prior to the finish of the current fiscal year, we will deduct vacation days from that total annual allocation at the rate of one "day" per calendar month not worked. (One "day" is defined as the annual average number of hours you are assigned to work each day over a 5-day workweek; i.e. with your assignment to work ___ hours per week, one "day" = ___ hours: (___/5).) If you have used all of your annually allocated vacation days prior to termination, the pay for any vacation days taken beyond those earned per calendar month worked shall be deducted from your final pay check. You may carry forward up to six "days" of vacation time to the next fiscal year.

As part of your employment, we will provide at our expense:

- Direct payment of \$____, which is an amount equal to 10% of your salary, to the UUCO Retirement Plan on your behalf;
- [if applicable] \$____ towards the cost of enrolling in credentialing training; and
- [if applicable]\$_____ for professional expenses.

We also will reimburse you 80% of your health insurance premium, prorated by the percent of full-time that you are working, i.e. ___/40 = 0.____ [do the math and fill in the blanks]. Based on the documentation you have provided, your reimbursement will amount to \$_____ per month allocated between your two semi-monthly paychecks. **[Include the following where UUCT employee is covered under spouse's health insurance plan]** Those payments are subject to federal taxes as ordinary income because the initial premium payments were made pre-tax as documented in your spouse's pay stub dated_____.

You may purchase, at your expense, life, dental, and long-term disability insurance at very competitive rates in the plans offered by the Unitarian Universalist Association. You also may make voluntary, additional payments to the UUCO Retirement Plan. You can obtain copies of the detailed UUCO plan as well as a summary, from the UUA website at www.uua.org/retirement, or by contacting the UUCO Retirement Plan Director at (617) 948-4265 or retirementplan@uua.org. You can obtain a copy of UUCT's Employer Participation Agreement from Rev. _____ [the minister].

We deeply appreciate the work you do for our church.

ACCEPTANCE : If you accept this offer, please sign and date below, make yourself a copy, and return this original to _____ [Personnel Committee chair]. Thank you.

Sincerely,

_____,
Executive Board President

Signature of acceptance: _____ Date: _____

cc: Rev. _____ [minister]; _____ [immediate supervisor if applicable];
_____, Payroll Officer; _____, Treasurer

Attachment #7
LETTER OF REHIRE TEMPLATE FOR LIMITED-HOURS POSITIONS
Revised July 2016

Date _____

Name & Address _____

Dear _____,

The Unitarian Universalist Church of Tallahassee is pleased to notify you that you have been re-hired for the _____ fiscal year in the position of _____.

Your pay rate is \$_____ per hour. As in the past, we ask that you submit a monthly time sheet to our _____ [position], _____ [name], to substantiate the number of hours you have worked in the preceding month.

If you wish to change your exemptions or increase your federal withholding amount, please complete a new W-4 and turn it in to _____, our Payroll Officer.

You may now make voluntary, tax-deferred payments to the UUU Retirement Plan if you wish. To do so, please notify our Treasurer, _____. You can obtain copies of the detailed UUU plan as well as a summary, from the UUA website at www.uua.org/retirement, or by contacting the UUU Retirement Plan Director at (617) 948-4265 or retirementplan@uua.org. You can obtain a copy of UUU's Employer Participation Agreement from Rev. _____ [the minister].

We deeply appreciate the work you do for our church.

ACCEPTANCE : If you accept this offer, please sign and date below, make yourself a copy, and return this original to _____ [Personnel Committee chair]. Thank you.

Sincerely,

Executive Board President

Signature of acceptance: _____ Date: _____

cc: Rev. _____ [minister]; _____ [immediate supervisor if applicable];
_____, Payroll Officer; _____, Treasurer

Attachment #8
PROCEDURES UPON THE DEPARTURE OF AN EMPLOYEE
Revised September 2014

1. Exit Interview

An exit interview is appropriate when a staff person leaves employment with the church for whatever reason – voluntary resignation because of moving, changing life situation, changing interests, returning to school, or better job opportunity; involuntary resignation; retirement; or discharge/dismissal. The exit interview should be scheduled within two weeks of the employee's departure or earlier, if possible.

The purpose of the exit interview on the part of the church is:

- To better understand the reasons for the departure if it is a voluntary resignation or a retirement.
- In all other instances, to give the employee a chance to talk about their perspective on why their employment with the church was not satisfactory.
- To get feedback about all aspects of the position: the work setting and work environment, church relationships surrounding the position, the process and procedures followed by the church, and management and supervisory issues
- To gather ideas from the departing employee about how the position can be strengthened and improved.
- To better enable transfer of knowledge and experience about the position to the staff person's successor.
- To acquire information about ongoing projects, issues, and unfinished tasks that might need attention.
- To gain relevant information that might be useful in providing better staff training for new employees in that position.
- To gain insight that might help with recruitment, management and retention of future employees.
- To thank the employee for their service to the church.

On the part of employees, the exit interview enables them:

- To share some of the knowledge, experience and accumulated "history" they have acquired in the position so that it can be passed on constructively to a successor.
- To give constructive feedback and criticism about the church and about their position.
- To talk about their concerns, anxieties and personal issues surrounding the departure.
- To "vent" negative or angry feelings, if any, in a safe, non-threatening setting.
- To leave the job with the feeling that their work was valued and appreciated, even in cases of involuntary resignation or dismissal.

Participation in an exit interview is voluntary, and an employee may not be compelled to attend. A written questionnaire may be offered as an alternative, but completion of it, too, is voluntary. Examples of questions that may be asked during an exit interview and a questionnaire form are included as Attachment 9 of this Staff Personnel Manual.

As agreed upon by the Minister and the Personnel Committee, the chair of the Personnel Committee, or a designee, is responsible for conducting the exit interview and is the primary interviewer. S/he may select one additional person to be present.

Once the interview is completed, the primary interviewer compiles the information and prepares a draft report for the employee to review and suggest changes before the final report is shared with the Minister and the Personnel Committee. A copy is placed in the departing employee's personnel file. The interviewer shall share a summary of the exit interview with the Executive Board, the departing staff member's support team and the Committee on the Ministry.

2. Final Tasks

The Minister, as chief of staff, or a designee, or the Executive Board member under whose oversight the position falls if there is no minister or the minister is unable to do so, is responsible for assuring completion of the tasks listed on the Employee Separation Form (Attachment 10).

Attachment #9
Employee Exit Interview Form

Employee's Name:

Position:

Name(s) and Position(s) of Interviewer(s):

Interview Date:

Reason for Separation:

Exit Interview Questions (attach separate sheet with responses)

Tell me about how you've come to leave UUCT?

How do you feel about your leaving UUCT?

How would you have preferred things to be different?

What factors do you think contributed to your leaving?

What specific suggestions do you have for how we could have handled this situation/these issues better in the future?

How do you feel about the church in general?

What has been good or satisfying about your work here at UUCT?

What has been frustrating, difficult or upsetting in your time with us?

What could you have done better had you been given the opportunity?

What extra responsibility would you have welcomed that you were not given?

How could we have enabled you to make fuller use of your capabilities and potential?

What training would you have liked that you did not get and that we did not provide?

What can you tell me about communications within UUCT? Good? Bad? Problems?

How would you describe the culture or "feel" overall here at UUCT?

What suggestions would you make to improve working conditions, hours, work setting, etc.?

What can you say about the way your performance was evaluated?

How well do you think the performance evaluation system worked for you?

What would you say about the way you were supervised?

How would you have changed the expectations and work demands that were placed on you?

How could we have made better use of your views and experience?

If your successor has been named before you leave, would you be willing to work with him/her and share your knowledge and experience before you leave?

If a successor has not been named, would you be willing to help us during a transition period and share your knowledge and experience with someone else?

Attachment #10 Employee Separation Form

To be completed by Minister or designee or if neither is available, the Executive Board member under whose oversight the position falls.

Employee's Name:

Position:

Employee's Supervisor and Members of Support Team (if any):

Initial Employment Date:

Separation Date:

Reason for Separation (see Attachment 8):

Checklist of Separation Tasks:

- ____ Return of facility keys
- ____ Return of credit, phone, and/or check authorization cards
- ____ Verify status of any petty cash funds or recent cash collections.
- ____ Return of *Manual of Policies and Procedures*
- ____ Permanent address to mail W-2 and/or 1099 forms
- ____ Written record of password(s) for access to church computers and computerized data and files
- ____ Verify that integrity of computerized data and files has not been compromised
- ____ Provide Treasurer with exact termination date for calculating final paycheck, retirement, earned vacation/leave, etc.
- ____ Verify with Treasurer that the staff person is removed from the insurance and retirement records, charge card authorization list, payroll, etc.
- ____ Copy of completed exit interview, if any, plus this form, placed in employee's file and file moved to inactive folder

Attachment #11
Items That Should Be in Each Staff Person's Personnel File
Revised April 2016

- Application Form
- Record of Reference Investigation and Hiring Procedure
- Job Description At Date of Hire
- Staff Contact & Emergency Information Form
- Subsequent and Current Job Descriptions
- Job descriptions, at a minimum, should include the job title, the general work requirements; the job classification – regular FT, regular PT, special PT, hourly, exempt, non-exempt, etc.; - education/training/skills required, relevant/required experience; specific job tasks; typical schedule or hourly workday; if evening work is required; who supervises the position; and who does the performance evaluation. The church should use a single job description format for all positions.
- IRS Form W-4 Employee Withholding Allowance Certificate (required by law)
- USCIS Form I-9 Employment Eligibility Verification (required by law)
- Record of Background Investigation Having Been Performed (If required by church policy)
- Initial Letter of Hire or Initial Contract (Should specify hours and rate of pay, and terms and conditions of employment)
- Annual Letters of Hire/Re-Hire or Annual Contract (Should specify hours and rate of pay, and terms and conditions of employment for each year of employment)
- Annual Performance Evaluations
- Exit Interview Form or Summary (when person leaves for whatever reason)

(JP 4/07; Updated 3/11; 4/16)

Attachment #12

Corrective Actions

September 2018

Correcting employee behavior should always be conducted in the spirit of the general UUCT employment philosophy of treating our employees with respect and in accord with our Covenant of Right Relations. To that end, this attachment documents a set of policies and practices designed so you, a manager at UUCT, can treat each employee fairly, appropriately, and in a defensible manner.

In almost all cases, corrective actions can consist of simple discussions with the employee. Clearly articulate the specific deficiencies, and come to agreement on how to avoid the behavior in the future. If the behavior persists despite repeated discussions, you will want to begin documenting that the discussions are occurring. This can be as simple as a quick email to yourself or a short note for your files. Include the relevant dates, a brief summary to jog your memory later, and any specific corrective actions discussed.

At some point, you may decide that the continuing behavior warrants an elevated approach. UUCT uses three mechanisms for corrective actions: informal counseling, letters of concern, and reprimands. Informal counseling consists of a pre-arranged meeting with the employee with a discussion of the behavior as its focus. An email to the employee follows the meeting to document the conclusions and corrective actions. The letter of concern is an elevated step consisting of a template filled out before meeting with the employee. At the meeting, you and the employee will sign and counter-sign the letter of concern. Copies of the signed letter of concern will go to the employee and to the manager's files (but not the employee's personnel file). A reprimand is similar to the letter of concern, but a reprimand is considered a formal disciplinary action and it will be included in the employee's personnel file.

When deciding on the appropriate response, consider several factors, including: was this a single incident or repeat behavior; number and type of previous disciplinary actions; severity of the incident; whether the behavior had been a point of emphasis; and impacts on other employees.

Confirm also that:

1. the employee's behavior was contrary to stated expectations,
2. the employee knew the expectations,
3. the employee knew the consequences for not meeting the expectations,
4. you fairly and objectively investigated the circumstances,
5. there is clear documentation of the behavior,
6. you are applying corrective action evenhandedly and without discrimination, and
7. the level of corrective action is appropriate to the behavior.

These concepts are referred to as the seven steps of just cause. Following them helps ensure that your response is fair, appropriate, and defensible.

You will need to obtain input and potentially approval before proceeding with some of the corrective actions. You can always, however, ask for assistance and advice from the personnel committee chair. Table 1 summarizes the corrective actions and is a tool to help you determine the appropriate response. Following the table, there are templates for an informal counseling email, letter of concern, and reprimand.

Note that employees have the right to grieve a disciplinary action (reprimand, suspension, or dismissal) through the procedures outlined in the Staff Personnel Manual, Section F.1. This process elevates the complaint to the next management level—the Minister, if the immediate supervisor is not the Minister; or the Personnel Committee, where the Minister is the immediate supervisor. This process provides guidance and timelines for resolving the employee complaint quickly and fairly. It is also available for resolving other employee complaints, if work-related problems between employees and their supervisors cannot otherwise be resolved.

Table 1. Corrective Actions

Factors to Consider	Response	Type of Action¹	Approval Needed	Before Acting	Follow Up
<ul style="list-style-type: none"> • Single incident or repeat behavior • Number and type of previous responses • Severity of the incident • Point of emphasis • Impacts on other employees • Seven steps of just cause 	Discussion with employee	Non-disciplinary	Just you	Just do it! (Ask if unsure, handle privately, etc.)	Inform supervisor; document via short note to your files.
	Informal counseling	Non-disciplinary	Your supervisor	Discuss with your supervisor; arrange for meeting with you, employee, and your supervisor; gather your thoughts about the incident(s) and have specific corrective actions ready.	Send email to employee with topics discussed and corrective actions clearly identified; add to your files; inform personnel committee chair.
	Letter of Concern	Non-disciplinary	Chief of Staff ²	Discuss with supervisor; obtain Chief of Staff approval; get template for the letter from staff personnel manual or PCC; draft the letter for review by Chief of Staff.	Letter is counter-signed by employee; make copies for employee, you, and Chief of Staff; add to your files; give copies to employee and Chief of Staff.
	Reprimand	Disciplinary	Chief of Staff and personnel committee chair (PCC)	Discuss with supervisor; obtain Chief of Staff and PCC approval; get template for the reprimand from staff personnel manual or PCC; draft the reprimand for review by Chief of Staff and PCC.	Reprimand is counter-signed by employee; make copies for employee, you, Chief of Staff, and personnel files; add to your files; give copies to employee and Chief of Staff.
	Suspension or Dismissal	Disciplinary	Executive Board ³	Discuss with supervisor; arrange for meeting with supervisor, Chief of Staff, and PCC; get direction on how to proceed.	Documentation will depend on the response and approach; likely will include a report to the Executive Board with a recommended action.

¹ "Disciplinary" means a record of the activity will be placed in the employee's personnel file by the Chief of Staff.

² While it has at times varied, the UUCT Minister generally acts as Chief of Staff.

³ Decisions to suspend or terminate an employee are ultimately made by the Executive Board.

Sample informal counseling follow up email

To: Employee

From: Supervisor

CC: Chief of Staff

Subject—Informal counseling on DATE

Thank you for meeting with ATTENDEES on DATE. At that meeting, we discussed the following specific responsibilities and expectations for which improvement is needed:

- Brief recap of issue(s).
- Do not need to include all specific dates and details of every incident.
- Include enough specificity, however, so there is no confusion as to what behavior needs to be corrected.

After discussing these areas of concern, we agreed on the following expectations for the future:

1. Expectations are listed here.
2. Again, these need to be specific steps that should be taken (with deadlines), specific procedures that will be followed, etc.

This email serves to document the discussion from our meeting in as clear a manner as possible, so as to avoid confusion regarding expectations. Neither the meeting nor this email are considered disciplinary action, and this documentation will not be included in your personnel file. For additional support, please feel free to take advantage of the resources available to you, including your support team, your executive board liaison, the personnel committee, and the committee on the ministry.

Sample Letter of Concern

(Use UUCT letterhead.)

MEMORANDUM

DATE: Date

TO: Employee

FROM: Supervisor

(THROUGH: Chief of Staff)

SUBJECT: Letter of Concern

This Letter of Concern is in response to your recent behavior, as detailed below. It is not a formal disciplinary action. This Letter of Concern will not be placed in your personnel file, and this counseling is not a formal complaint or grievance.

[Paragraph(s) documenting the incident(s) leading to the need to correct the employee's behavior. Include details and dates of incidents. Include recap of any previous corrective actions, such as documented discussions with the employee and any informal counseling.]

Going forward, the expectation is that you will... [insert specific expectations for employee and, if applicable, for the supervisor or Chief of Staff to accommodate the specific expectations.]

Again, this letter is not a disciplinary action, but serves as a warning. Your failure to comply with this directive may result in disciplinary actions. For additional support, please feel free to take advantage of the resources available to you, including your support team, your executive board liaison, the personnel committee, and the committee on the ministry.

Supervisor Signature _____ Date _____

Employee Signature _____ Date _____

Sample Reprimand

(Use UUCT letterhead.)

OFFICIAL REPRIMAND

[Name]	[Title]
--------	---------

Employee's Name

Employee's Title

[Name]	[Title]
--------	---------

Supervisor's Name

Supervisor's Title

Standard(s) of conduct violated:

- Violation of specific policy or practice.** Employees are expected to be aware of and comply with the policies and practices outlined in the staff personnel manual or manual of policy and procedures relevant to their position. [Cite specific policy or practice violated, such as "Section A.6. Internet Policy" or "Section A.8. Alcohol and Drug-Free Workplace."]
- Poor performance.** Employees shall strive to perform at the highest level of efficiency and effectiveness. Employees are expected to be reliable and dependable; to show up for work, ready to work, on a reliable basis; to observe established work hours and scheduled appointments; to complete work on time; to obtain permission before being off work or before working additional hours; and to schedule leave in a manner that minimizes work disruption.
- Inability to perform assigned duties.** Employees must be able to perform all essential duties of their position with or without an accommodation, in a competent and adequate manner.
- Negligence.** Employees shall exercise due care and reasonable diligence in the performance of job duties.
- Insubordination.** Employees shall carry out the directives of persons with duly delegated authority, in accord with the relevant position descriptions and other policies and practices outlined in the staff personnel manual.

Date and circumstances of violation:

[Explain each checkmark, above.]

Corrective action expected:

[List here.]

This is an official reprimand and formal disciplinary action. Future violations may result in further or more severe disciplinary actions, up to and including suspension or dismissal.

Employee Signature _____ Date _____

cc: Employee
Supervisor
Chief of Staff
Personnel files

Attachment #13
SHARED RESPONSIBILITIES GRID FOR UUCT PROGRAMS:
STAFF, MINISTER, BOARD LIAISONS & COMMITTEES

Instructions: The purpose of this form is to clarify the various responsibilities of staff members, the Minister, Executive Board liaisons, support teams and program committees (e.g. Youth RE, Music, Campus Ministry committees) with regard to UUCT programs. The form may be completed initially at a joint meeting of all involved, or it may be completed individually, followed by a joint meeting to discuss and finalize. For each task listed, place an "x" in the appropriate column to indicate who is responsible. Since some tasks are shared, "x" as many columns as needed for each task listed. When a staff member works with more than one committee, be sure all relevant committees are included.

PROGRAM: _____ Date: _____

Staff Member: _____ Minister: _____

Board Liaison (name & title): _____

Committee(s) & Current Chairperson(s): _____

Program Task	Staff Member	Board Liaison	Support Team	Committee(s)	Minister
Supervise staff & interactions among staff					
Call meetings of support team					
Set annual goals for staff member					
Evaluate staff member performance with regard to goals & tasks					
Report to & make requests to Board					
Appoint committee chair(s)					
Attend Church Council & Program Budget Council meetings					
Set committee meetings; prepare agendas & meeting summaries					
Attend committee meetings					
Develop & strengthen committee(s)					
Design the program					
Formulate program goals					
Evaluate program					

Program Task	Staff Member	Board Liaison	Support Team	Committee(s)	Minister
Schedule & coordinate involvement in Sunday services					
Schedule, plan and coordinate special events, specifically: _____					
Secure program coverage in church newsletter					
Secure program coverage in Sunday announcements as needed (written & verbal)					
Secure, train & support volunteers					
Obtain program resources (e.g. curricula, music)					
Maintain supplies, equipment & other resources (e.g. lending library, playground equipment, choral music, hymnals, etc.)					
Keep records					
Develop program budget					
Recommend to Personnel Committee staff member salary & benefits for upcoming year					
Authorize expenditures - Operating budget - Special funds					
Keep track of expenditures - Operating budget - Special funds					
Schedule, plan & coordinate special fundraising					
Attend area & denominational training, meetings, & conferences					
Read, distribute & file District, UUA & UUCT Board materials					
Additional tasks (e.g. publicize program, communicate with program participants, greet & integrate program newcomers, choose curricula) _____ _____					

ATTACHMENT #14
STAFF CONTACT & EMERGENCY INFORMATION FORM
(Please Print)

NAME _____ DATE _____

CURRENT STREET ADDRESS _____

CITY/STATE/ZIP _____

HOME PHONE _____ OTHER/CELL _____

BIRTHDATE _____ INITIAL UUCT HIRE DATE _____

EMERGENCY INFORMATION

In case of an emergency, whom should we first call/contact:

1. Name _____ Relationship _____

Address _____

Phone _____ or Other Phone _____

Other Information About This Contact Person: _____

If we are unable to reach your first contact, whom else might we call/contact:

2. Name _____ Relationship _____

Address _____

Phone _____, or Other Phone _____

Other Information About This Contact Person: _____

Do you have a medical condition that might be important for first responders to know if we had to call them?

Note: If you move or if any information on this sheet changes, we would appreciate it if you would complete a new form. Thank you.

Attachment #15
Staff Position Description
Office Administrator
Updated August 20, 2017

Goal	To maintain a well-organized and functional office that will provide administrative and clerical support in meeting the mission and vision of the Unitarian Universalist Church of Tallahassee.
Time Frame	Thirty (30) regularly scheduled hours per week.
Accountability	The Office Administrator is accountable to the Minister as Chief of Staff, and ultimately to the Executive Board through the President. The Minister provides day-to-day supervision. A support team consisting of the President, the Vice President for Management (for facility usage, technology issues, administration budget items, and supervision of the Sexton), the Meridian Editor, and the Membership Chair, is available to the Office Administrator.
Job Classification	This is a part-time, salaried, non-exempt position.
Tasks	These duties are to be carried out in accordance with established office procedures and the <i>Manual of Policies and Procedures</i> , and are to be prioritized for the time available, in consultation with the Minister.

Supervision Tasks

- Supervise Sexton in consultation with the VP for Management.
- Review and approve Sexton's time sheets.

Communications Tasks

- Prepare weekly Order of Service and Announcements by specified deadline.
- Assist in soliciting material for and producing the Meridian newsletter with the Editor, including as necessary typing, formatting, layout, and proofing by specified deadline.
- Regularly review, solicit material for, and update information on the website and on social media in coordination with the appropriate on-line administrators.
- Coordinate church-wide electronic communications with the Minister, Meridian Editor, and Board President.
- Maintain, post, and publish church calendar.
- Answer church telephone and receive and review daily incoming mail and email, responding to and/or forwarding to the appropriate person(s) for information or necessary action.
- Post appropriate items received in mail on bulletin boards.

Budget & Expenditure Tasks

- Make copies of bills and receipts for vendor files and for others as requested.
- Coordinate necessary authorizations for bill payment.
- Record incoming checks and distribute to Collecting Treasurer.
- Prepare payments for signature/approval by Disbursing Treasurer.
- Enter pledge payments in church information management system.
- Manage church's credit card transactions.
- Monitor operating budget line items relating to office administration and provide input for budget development to VP for Management.
- Complete biweekly payroll sheet and transmit to payroll vendor.

Member & Visitor Record-Keeping Tasks

- As directed by Membership Chair, prepare visitor and other correspondence by specified deadlines.
- In coordination with Membership Chair, manage membership module of church information management system to ensure all data are accurate and current.
- Maintain attendance spreadsheet for each fiscal year.

Facilities Tasks

- Schedule facility usage.
- Collect facility rental deposits and fees prior to events, in consultation with VP for Management as necessary. Prepare monthly rental report for VP for Management.
- Manage distribution of church keys and opening codes for keypad locks.
- Walk around church buildings once daily to check that doors are locked, windows are closed, lights are off, and outdoor HVAC units are not running continuously. Inform Buildings & Grounds Chair about any possible problems.
- In coordination with the Sexton, contact repair people, inspectors, and vendors, and be available to unlock doors and confer with them on site during regular office hours.

Other Administrative Tasks

- Serve as systems administrator of church information management system.
- Provide clerical support to the Minister, the Executive Board, other staff members, and committee chairs for special projects including Annual Canvass and Harmony Camp.
- Maintain church records and administrative files, both hard copy and electronic files.
- Ensure regular back up of all electronic files.
- In coordination with appropriate committees and coordinators, acknowledge memorial gifts and process orders for purchase where appropriate (memorial garden plaques and bricks, hymnals, etc.).
- Order and pick up, as needed, office and custodial supplies, nametags, books, etc.
- Operate and provide for routine maintenance of office equipment; e.g., computers, printers, copier, fax, phones.
- Recruit and train office volunteers as needed.
- Be a welcoming presence and conduct all interactions in a professional and friendly manner.
- Other duties as assigned.

Knowledge, Skills, and
Abilities Needed

Administrative and clerical experience in an office environment.

Strong organizational skills.

Ability to work independently and on deadline.

Good listening and communicating skills.

Ability to maintain confidentiality of sensitive information.

Ability to interact with diverse people.

Ability to work in collaboration with staff and volunteers.

Good knowledge of grammar, spelling, and punctuation rules.

Attention to detail and proof-reading skills.

Strong computer skills, particularly in desktop publishing, word processing, spreadsheets, websites, and social media. Also knowledge of or willingness to learn the church information management system.

Requirements

Employment is dependent on successfully completed background investigation (including a criminal background check).

Submit references.

Agree to a six-month probationary period, which may be extended for a second six months.

Comply with provisions of the *Staff Personnel Manual*.

Salary

As specified each fiscal year in the church budget. A new employee may start at a lower rate than the budget indicates, depending on skills and experience. Employee's shares of Federal employment taxes are deducted from paychecks.

Benefits

Annual paid vacation as detailed in Section C of the *Staff Personnel Manual*.

Personal leave, family leave, and paid holidays as detailed in Section C of the *Staff Personnel Manual*.

Health insurance, workers' compensation insurance, retirement plan contributions, and professional expenses as detailed in Section D of the *Staff Personnel Manual*.

Access to dental, life, and long-term disability insurance programs as detailed in Section D of the *Staff Personnel Manual*.

Attachment #16
Staff Position Description
Director of Religious Exploration
Updated August 20, 2017

Goal	To provide ongoing professional staff leadership for the Lifespan Religious Exploration Program, both in visioning and coordination of details.
Time Frame	<p>About 22 hours per week. Sunday mornings required, with 12 Sundays off per year.</p> <p>Sundays off means the employee is not responsible for participating in classroom activities or other religious exploration activities on that Sunday. Employee needs to work with the Minister and lay leadership to ensure that religious exploration activities for the Sundays off will be provided. Employee still needs to work their contracted hours that week per the letter of hire or re-hire.</p> <p>Employee may also take off up to two additional Sundays per year using vacation leave. Employee is expected to schedule Sundays off and vacation leave so that no more than two Sundays in a row are missed, but more than two Sundays in a row may be missed with advance approval by the Minister.</p>
Statement of Accountability	The Director of Religious Exploration (DRE) is accountable to the Minister as Chief of Staff, and ultimately to the Executive Board through the Vice President for Religious Exploration. A support team, consisting of the VP for RE, the RE Committee Chair and the Adult RE Coordinator, is available to the DRE. The DRE is considered a religious professional in ministry. UUCT is a shared ministry congregation.
Job Classification	This is a part-time, salaried, non-exempt position.
Tasks	<p>With the RE Committee and the Adult RE Coordinator, recruit, train, and support volunteers.</p> <p>Provide curriculum planning, preparation and updates.</p> <p>Supervise childcare provider staff.</p> <p>With the RE Committee and Adult RE Coordinator, provide leadership for long-range planning, goal setting, and yearly program evaluation.</p> <p>Advocate for and insure the integration of lifespan religious exploration in the planning, mission, and vision of the congregation.</p> <p>Ensure compliance with, and initiate periodic review of, the congregation's Safety Policies and Procedures.</p> <p>Maintain RE records and resources, and monitor RE budgets.</p> <p>Use all available means to publicize RE programs and events.</p> <p>Insure that new families are welcomed before and after services.</p> <p>Plan intergenerational worship and events with the Minister and/or other groups in the congregation.</p>

When requested, serve as RE staff representative on church-wide committees or task forces.

Implement the UUCT Safety Policy and other policies related to the Lifespan RE Program, and recommend updates.

Attend staff meetings to coordinate activities and goals.

Attend religious education conferences and workshops for UU professionals (e.g. Liberal Religious Educators Association - LREDA, Florida LREDA, and Renaissance modules).

Knowledge, Skills,
And Abilities Needed

Initiative; ability to encourage others; knowledge of religious education philosophy and Unitarian Universalist curricula; comfort in relating to a wide variety of religious views and all ages of youth.

Relational, organizational, administrative, communicative, volunteer management, visioning, and teaching skills.

Bachelor's degree or comparable life experience.

A willingness to join LREDA.

Requirements

Employment is dependent on successfully completed background investigation (including a criminal background check).

Have a strong identification with and articulation of UU principles.

Comply with provisions of the Staff Personnel Manual.

Submit references.

Have a flexible schedule.

Preference is for an applicant able to commit long term.

Salary

As specified each fiscal year in the church budget. A new employee may start at a lower rate than the budget indicates, depending on education and experience. Employee's share of Federal employment taxes is deducted from paychecks.

Benefits

Annual paid vacation as detailed in Section C of the *Staff Personnel Manual* for employees who work less than 30 per week.

Paid personal leave, family leave, paid holidays, sabbatical leave, and personal leave without pay as detailed in Section C of the *Staff Personnel Manual*.

Health insurance, workers' compensation insurance, retirement plan contributions, and professional expenses as detailed in Section D of the *Staff Personnel Manual*.

Access to dental, life, and long-term disability insurance programs as detailed in Section D of the *Staff Personnel Manual*.

Attachment #17
Staff Position Description
Music Director
Updated August 20, 2017

Goal	To provide ongoing professional staff leadership for the music ministry, using the talents of church members and others to enrich Sunday morning services and selected activities.
Time Frame	<p>About 18.5 hours per week. Sunday mornings required, with 12 Sundays off per year.</p> <p>Sundays off means employee is not responsible for participating in the Sunday morning worship service. Employee needs to work with the Minister and lay leadership to ensure that music for the Sundays off services will be provided. Employee still needs to work their contracted hours that week per the letter of hire or re-hire.</p> <p>Employee may also take off up to two additional Sundays per year using vacation leave. Employee is expected to schedule Sundays off and vacation leave so that no more than two Sundays in a row are missed, but more than two Sundays in a row may be missed with advance approval by the Minister.</p>
Statement of Accountability	The Music Director is accountable to the Minister as Chief of Staff, and ultimately to the Executive Board through the Vice President for Worship. The Minister provides day to day supervision. A support team, consisting of the VP for Worship, the Program Committee Chair, and the Music Committee Chair, is available to the Music Director.
Job Classification	This is a part-time, salaried, non-exempt position.
Tasks	<p>Select, practice, and perform topic-related music from a variety of genres to enhance 37 Sunday services each year.</p> <p>Provide piano accompaniment for hymns and participate in hymn selection.</p> <p>Provide accompaniment for guest performers for Sunday services, including rehearsals.</p> <p>Direct the choir, which includes giving guidance and instruction to the singers in rehearsals and performances, selecting music, and working with guest soloists.</p> <p>Schedule substitute musicians for Sundays the Music Director is not present.</p> <p>Communicate regularly with Minister, and lay leaders on the Minister's Sundays off, to plan services.</p> <p>Communicate with the Music Committee and Program Committee to coordinate services, activities and events.</p> <p>Provide staff support for designated events at UUCT, such as the Christmas Eve service, the Winterfest, Music Sunday, and the Easter Sunrise Service, or other events as agreed upon by the Music Director, Minister and support team.</p> <p>Perform administrative duties related to Music Program: communicating with substitute musicians, guests, and choir members via phone and email, etc.; writing articles for the church newsletter; making recommendations for updating church policies related to the Music Program.</p>

Tasks (continued)	<p>Schedule regular tuning and maintenance of the pianos.</p> <p>Set annual goals as a staff member and attend staff meetings.</p> <p>Attend to professional development.</p>
Knowledge, Skills, And Abilities Needed	<p>A basic mastery of the piano and choral conducting skills.</p> <p>Familiarity with a wide variety of music repertoire, for both piano and choir.</p> <p>Excellent interpersonal skills for leadership of the choir and liaison work with the lay leaders and Minister.</p> <p>Organizational skills to ensure that services are planned well in advance with the Minister or lay leaders.</p> <p>A willingness to join the Unitarian Universalist Musicians' Network</p>
Requirements	<p>Employment is dependent on successfully completed background investigation (including a criminal background check).</p> <p>Have a strong identification with and articulation of UU principles.</p> <p>Have a flexible schedule.</p> <p>Comply with provisions of the Staff Personnel Manual.</p> <p>Submit references.</p>
Salary	<p>As specified each fiscal year in the church budget. A new employee may start at a lower rate than the budget indicates, depending on education and experience. Employee's shares of Federal employment taxes are deducted from paychecks.</p>
Benefits	<p>Annual paid vacation as detailed in Section C of the <i>Staff Personnel Manual</i> for employees who work less than 30 per week.</p> <p>Paid personal leave, family leave, paid holidays, sabbatical leave, and personal leave without pay as detailed in Section C of the <i>Staff Personnel Manual</i>.</p> <p>Health insurance, workers' compensation insurance, retirement plan contributions, and professional expenses as detailed in Section D of the <i>Staff Personnel Manual</i>.</p> <p>Access to dental, life, and long-term disability insurance programs as detailed in Section D of the <i>Staff Personnel Manual</i>.</p>
Other	<p>The Music Director may be asked to provide music for weddings and memorial services at the church from time to time. These duties are not included in the job description, and fees for these services shall be negotiated between the Music Director and interested parties.</p>

Attachment #18
Staff Position Description
Chief Childcare Provider

Updated September 21, 2014

- Goal:** To provide childcare on Sunday mornings during the service and as needed for other church-sponsored activities and events; to provide administrative assistance for the childcare program by scheduling childcare services when needed for UUCT events and activities.
- Time Frame:** Although some seasons/weeks may require more or less work, over the year, this position will average 3 hours per week.
- Statement of Accountability:** The Chief Childcare Provider is supervised by the Director of Religious Exploration (DRE) and is accountable to the Executive Board through the Vice President for Religious Exploration.
- Job Classification:** This is a part-time, hourly, non-exempt position.
- Tasks:**
- Plan the schedule for staff and volunteers who work during Sunday services and for other UUCT events and activities where childcare services are needed.
 - Discuss with DRE any supervisory or special training needs of childcare staff and volunteers.
 - Train volunteers in childcare procedures and guidelines.
 - Maintain attendance and information records of children in nursery care during Sunday services.
 - Provide quality childcare in accordance with the congregation's Safety Policies and Procedures for children ages birth to 3 years old during church services and during other church-sponsored activities and events which may require childcare for children up to 12 years of age.
 - Provide playground supervision for children under childcare.
 - Offer safe and age-appropriate activities and play situations.
 - Observe and report to the DRE on conditions of nursery, toys, and playground equipment.
- Knowledge, Skills, and Abilities Needed:**
- A love of children!
 - Knowledge of developmental abilities and age-appropriate activities for children ages 0 – 12 years.
 - Experience with children (including diapering and feeding).
 - Ability to produce and maintain accurate and reliable schedules and reports for the childcare program.

- Requirements: Employment is dependent on successfully completed background investigation (including a criminal background check).
- Willingness to obtain Infant/Child CPR certification.
- Submit references.
- Salary: As specified each fiscal year in the church budget. A new employee may start at a lower rate than the budget indicates, depending on skills and experience. Employee's shares of Federal employment taxes are deducted from paychecks.
- Benefits: This is a part-time position that does not include benefits other than workers' compensation insurance.

Attachment #19
Staff Position Description
Assistant Childcare Provider
Updated September 21, 2014

Goal: To provide childcare on Sunday mornings during the service and as needed for other church-sponsored activities and events.

Time Frame: On call as needed and as scheduled by the Chief Childcare Provider. Although some seasons/weeks may require more or less work, over the year, this position will average 2 hours per week.

Statement of Accountability: The Assistant Childcare Provider is supervised by the Director of Religious Exploration (DRE) and is accountable to the Executive Board through the Vice President for Religious Exploration.

Job Classification: This is a part-time, hourly, non-exempt position.

Tasks:
Provide quality childcare in accordance with the congregation's Safety Policies and Procedures for children ages birth to 3 years old during church services and during other church-sponsored activities and events which may require childcare for children up to 12 years of age.

Provide playground supervision for children under childcare.

Offer safe and age-appropriate activities and play situations.

Observe and report to the Chief Childcare Provider or DRE on conditions of nursery, toys, and playground equipment.

Knowledge, Skills, and Abilities Needed:
A love of children!

Knowledge of developmental abilities and age-appropriate activities for children ages 0 – 12 years.

Experience with children (including diapering and feeding).

Requirements:
Employment is dependent on successfully completed background investigation (including a criminal background check).

Willingness to obtain Infant/Child CPR certification.

Submit references.

Salary: As specified each fiscal year in the church budget. A new employee may start at a lower rate than the budget indicates, depending on skills and experience. Employee's shares of Federal employment taxes are deducted from paychecks.

Benefits: This is a part-time position that does not include benefits other than workers' compensation insurance.

Attachment #20
Staff Position Description
Sexton
April 17, 2016

- Goal:** To provide general cleaning, repair, and maintenance of buildings and grounds.
- Time Frame:** Twelve (12) regularly scheduled hours per week. Available on Sunday mornings. Available to respond to situations such as minor emergency repairs or consulting with a contractor.
- Statement of Accountability:** The Sexton is accountable to the Minister as Chief of Staff, and ultimately to the Executive Board through the Vice President for Management. The Office Administrator provides day-to-day supervision. A support team, consisting of the VP for Management, and the chairs of the Buildings and Grounds and Landscape and Playgrounds Committees, is available to the Sexton.
- Job Classification:** This is a part-time, salaried, non-exempt position.
- Tasks:**
- Clean sanctuary, classrooms, kitchen, bathrooms, offices, and other interior areas of the church and empty trash and recycling weekly in preparation for Sunday programs and special church events.
 - Perform general repair (e.g. minor plumbing, electrical, and hardware) and maintenance tasks as needed (e.g. painting; stripping and waxing floors; steam cleaning carpets; cleaning gutters; replacing lights, batteries, HVAC filters, locks, etc.).
 - Check sanctuary furniture setup prior to Sunday morning service.
 - Keep walkways, entrances, driveways, and parking areas clear of debris.
 - Pressure wash walkways, stairs, veranda and the north sides of buildings as needed.
 - Mow grass and remove woody vegetation from lawns, parking lots, and storm water drainage way and detention area as needed.
 - Monitor playgrounds, lawns, and parking areas to remove fire ants, poison ivy, and other safety hazards. Remove pests from buildings and grounds as needed.
 - Inspect fire extinguishers and test smoke alarms monthly.
 - Identify safety concerns and report same to VP for Management.
 - Program HVAC thermostats for heating and cooling seasons.
 - Maintain mechanical/maintenance room for easy access, order, and safety.
 - Provide list of workday suggestions to Buildings and Grounds Committee Chair prior to monthly meetings.
 - Meet with contractors related to any building, ground, or appliance repairs, coordinating with the Office Administrator.

In coordination with the Office Administrator, order and pick up supplies and equipment to clean, repair, or maintain buildings and grounds and restock as appropriate.

Knowledge, Skills,
and Abilities Needed:

Safe use, maintenance, and repair of tools and equipment used for lawn and landscape maintenance, including mowers, blowers, chain saws, as well as cleaning, maintaining, and repairing buildings.

Safe use of chemicals for cleaning, maintaining, and repairing buildings and grounds.

Programming HVAC thermostats and general upkeep of units (filters, etc.).

Able to perform minor plumbing and electrical repairs.

Able to lift and move up to 50 pounds.

Able to climb up and down ladders to perform needed tasks.

Requirements:

Employment is dependent on successfully completed background investigation (including a criminal background check).

Comply with provisions of the Staff Personnel Manual and Safety Policy.

Available to respond to minor emergency repair needs.

Submit references.

Salary:

As specified each fiscal year in the church budget. A new employee may start at a lower rate than the budget indicates, depending on skills and experience. Employee's share of Federal employment taxes is deducted from paychecks.

Benefits:

Annual paid vacation, paid personal leave, and family leave as detailed in Section C of the *Staff Personnel Manual* for employees who work less than 30 hours per week.

Workers' compensation insurance as detailed in Section D of the *Staff Personnel Manual*. Employee may opt in to Unitarian Universalist Organizations Retirement Plan.

Attachment #21
Staff Position Description
Special Event Site Supervisor
February 19, 2017

Goal:	To have a small pool of people (2-3 people known to UUCT community) available that are familiar with UUCT buildings, grounds, emergency procedures, UUCT address, appropriate contacts, and sanctuary set-up in order to ensure safe use of facilities and property, the safety of its renters, and to provide emergency support services during a non-sponsored large event rental. <i>Note: The site supervisor position is not a security position nor is it a custodial or maintenance position.</i>
Time Frame:	Available as needed for any non-sponsored large event rental (weddings, parties, etc.) that either use the sanctuary or use the facilities and/or grounds for a long period of time during a one-time event.
Statement of Accountability:	Special Event Site Supervisors are notified and scheduled to work through the Office Administrator and are accountable to the Executive Board through the Vice President for Management.
Job Classification:	This is an as-needed, part-time, hourly, non-exempt position. (Only one site supervisor is needed at each event). There are no set hours for this position during the year and no guarantee that work will be available since this is related to facility rentals.
Tasks:	Make sure walkways are clear prior to main event time Assist with opening facility Answer questions about where things are located Go over safety items on site – Fire extinguishers, AED Locate First Aid Kit for group Have accident /incident reports available Have emergency contact information available - church address, parking, etc. Be available if there are any concerns - clogged toilet, etc. Remind group about chair set up in sanctuary Inspect clean up and recycle efforts after event Sign off on event checklist and place in OA mail bin Report any maintenance or custodial needs to OA/Sexton Lock/check doors after event
Knowledge, Skills, and Abilities Needed:	Knowledge of above task items Calm demeanor Ability to give directions effectively Ability to respond to emergency needs appropriately First Aid and CPR skills preferred but not required Knowledge of what to do if any alarms sound on property
Requirements:	Employment is dependent on successfully completed background investigation (including a criminal background check). On-site training with appropriate staff or managers Flexible work schedule – weekend, nights, or as needed for scheduled events Work scheduled times or reschedule with other supervisors and OA Must dress appropriately and set a good example as UUCT representative Must not participate in rental client’s event Must comply with provisions in Staff Personnel Manual

Must provide character references

Drug-free

Alcohol-free

Smoke-free

Salary:

As specified each fiscal year in the church budget. A new employee may start at a lower rate than the budget indicates, depending on skills and experience. Employee's share of Federal employment taxes is deducted from paychecks.

Benefits:

This is a part-time position that does not include benefits other than workers' compensation insurance. Employee may opt in to Unitarian Universalist Organizations Retirement Plan.

Attachment #22
Staff Position Description
Religious Exploration (RE) Coordinator
November 29, 2018

Goal:	Assists in planning and implementing the Religious Exploration (RE) program under the supervision of the Minister. This position is limited in duration and serves only during times when UUCT does not have an acting, interim, or settled Director of Religious Exploration (DRE). The RE Coordinator will primarily provide administrative support through assisting the Minister, who has primary responsibility for directing the RE program during period when the DRE is vacant.
Time Frame:	Available as needed, primarily an hour or two throughout the week to coordinate volunteers, along with additional hours on Sunday mornings to supervise RE activities.
Statement of Accountability:	The RE Coordinator is supervised by the Minister and is accountable to the Executive Board through the Vice President for Religious Exploration.
Job Classification:	This is a limited-hours, hourly, non-exempt position. Hours may vary from week to week, but the expectation for the position is an average of five hours per week or less. This position is not considered a religious professional.
Tasks:	<p>Routine responsibilities for the RE Coordinator include: coordinating volunteers (recruiting, guiding, supporting, and scheduling volunteers), serving as a teacher or program facilitator, maintaining RE social media pages, and supervising Sunday activities. The RE Coordinator may serve as acting DRE on Sunday mornings.</p> <p>As needed and as time permits, the RE Coordinator may be tasked with assisting or directing a summer program, a children's or youth program, an evening adult program, or a committee to develop family activities.</p>
Knowledge, Skills, and Abilities Needed:	<p>Knowledge, skills, and ability to complete the above tasks.</p> <p>Ability to encourage others.</p> <p>Ability to give directions effectively.</p> <p>Skills related to organization, administration, communication, and volunteer management.</p>
Requirements:	<p>Employment is dependent on successfully completed background investigation (including a criminal background check).</p> <p>Comply with the provisions of the Staff Personnel Manual and Safety Policy.</p> <p>Submit references.</p>
Salary:	As specified each fiscal year in the church budget. A new employee may start at a lower rate than the budget indicates, depending on skills and experience. Employee's share of Federal employment taxes is deducted from paychecks.

Benefits:

This is a part-time position that does not include benefits other than workers' compensation insurance. Employee may opt in to Unitarian Universalist Organizations Retirement Plan.