

MONITORING REPORT:

Executive Limitations Policies

#2 Treatment of Staff

September 2010

POLICY EL #2: TREATMENT OF STAFF

With respect to treatment of staff/volunteers, the Executive Team may not act in a manner inconsistent with the UU Seven Principles.

GENERAL INTERPRETATION:

ET defines “staff” as paid persons employed by the church and “volunteers” as unpaid persons doing work on teams or individually under supervision of the ET. The Executive Team is accountable for the actions and treatment of all paid and volunteer staff. The ET particularly promotes the first two UU Principles: the inherent worth and dignity of every person and justice, equity and compassion in staff and volunteer relationships.

Furthermore, the Executive Team shall not:

1. Operate without or fail to comply with written personnel policies that clarify personnel rules for staff, provide for effective handling of grievances, and protect against wrongful conditions, such as grossly preferential treatment for personal reasons.

INTERPRETATION:

The Executive Team uses the Personnel Policies and Procedures Manual (Manual), last updated January 31, 2009 following recommendations made to us by the Personnel Team. We follow these processes in all matters relating to all human resource issues. The Manual requires background checks on new employees, which we perform for all new hires 18 years of age or older. Other examples include a specific process for grievances, rules for hiring of family members and definitions of appropriate employee conduct.

Rationale: The Personnel Team is composed of church members whose professional lives were spent in human resources. Many of the Executive Team’s procedures are culled from this collective experience. Other policies in the Manual have come from, or are inspired by, two Alban Institute sources: “When Moses Meets Aaron: Staffing and Supervision in Large Congregations” by Gil Rendle and Susan Beaumont and “The Alban Personnel Handbook” by Erwin Berry.

EVIDENCE:

We report compliance. Examples of compliance with the manual include:

- Conducting a background check for our new night custodian, Bobby Hubbard.
- We also comply with vacation and sick day limits by documenting use of these benefits throughout the year to ensure compliance. Karen Rockhold needed extra

time off for a family vacation, since she had already used up her paid vacation allotment for the year, she took 1.5 unpaid days off.

- 403b plan payments are made monthly and we apply the matching and supplemental contributions in accordance with the manual.

2. Subject staff/volunteer to unsafe or unhealthy conditions.

INTERPRETATION:

The Senior Minister supervises the Building and Grounds supervisor and oversees maintenance of the building. As issues surrounding safety or health issues are identified by staff or volunteers, solutions are evaluated and executed. An annual safety audit process has been developed by the Building and Grounds team to look for potential safety issues and correct them in a timely manner. Priorities are set based on safety and financial considerations.

Rationale: We crafted the safety audit checklist from various sources and adapted them to our building's unique situation. Among the more useful sources in this regard is Brotherhood Mutual Insurance Company's website. Their safety lists are often a good base for an audit: <http://brotherhoodmutual.com/safetycentral/resources5-Checklists-BuildingsProperty.htm>

EVIDENCE:

The Building and Grounds Team has developed a safety audit and survey to use with staff and congregation. Our first safety audit was completed in March 2010 and problems addressed or repaired by our Building and Grounds Supervisor with assistance from the Building and Grounds Team. Building and Grounds Team will set up another safety audit this year, probably in the fall after the church year is up and running.

3. Fail to post in a prominent place current, established, internal complaint procedures or prevent staff/volunteers from using them.

INTERPRETATION:

The Manual covers internal complaint procedures for staff and is given to all staff persons when hired. All changes to the Manual are also distributed to staff upon hiring. There is a copy of the Manual on our web page in the members' area (under Executive Team Policies) and hard copies are available at the volunteer desk and in Business Manager's office. This process ensures that staff members have easy access to complaint procedures and are free to use them if needed. The Manual is also available to members of the congregation who may have questions or concerns regarding the ET's personnel procedures. The ET also provides an open work environment, encouraging all staff to speak openly of concerns so our staff can work together as a team to reach solutions. Personnel files contain signed forms from each member of the staff confirming receipt of the Manual and the Manual is readily viewed at our web site. Regular staff meetings and "open door" practices of supervisors provide opportunity for resolution of conflict and concerns.

Rationale: The Personnel Manual is available in both its print and electronic forms so as to make it available to the full membership and staff of First Unitarian Church.

EVIDENCE:

We report compliance in reference to paid staff. Our new Night Custodian (hired this summer) received a copy of the Manual and signed a form to document that he received it. However we are non-compliant for volunteer staff.

OUR PLAN TO COME INTO FULL COMPLIANCE:

The Manual primarily covers staff, and there are no established internal complaint procedures in place for volunteers. Our plan to come into full compliance is for the ET to develop a grievance procedure specific to issues related to volunteers. The goal is that this process to be established and operating before the end of fiscal year 2010-2011. Until the volunteer grievance procedure has been completed, the ET would refer to the staff Manual, the Church's behavioral covenant, and UU Seven Principles for guidance if there is a complaint issue with a volunteer. These would be handled on a case by case basis. The current wording of the Personnel Manual regarding volunteers is the following:

VI. VOLUNTEERS

Many of the operations of the Church are carried out by volunteers working as members of the Board, on committees or on individual task assignments. The purpose of the Volunteer Policy is to encourage effective participation on as wide a scale as possible in a manner that will provide the volunteer with encouragement, appreciation, proper direction and satisfaction in a task well done for the benefit of the Congregation.

Volunteers may be asked by members of the staff, the ministers, committee chairpersons or a designated member of a committee to perform a specific task or function (e.g. assist in the office, act as an usher, help with a party, present a worship service for the Sunday School, sing in the choir, etc.). If the volunteer agrees to serve, it is then the responsibility of the staff person or the one designated as the task or program leader to define the specific nature of the task, timing and relation of the task to those of others working on the same project. Wherever possible this should be summarized in writing to avoid confusion, overlap, conflict or discouragement on the part of the volunteer.

Volunteers may propose to the Minister, Board, Executive Team or an appropriate committee chairperson or staff member that a certain task or program be undertaken, but should not proceed to carry it out until they have specific agreement and approval of the person(s) with the appropriate responsibility and authority. This also applies to any publicity relating to personnel, positions taken, policies or actions of the Church.

4. Prevent staff from grieving to the Executive Team when:

- a) internal grievance procedures have been exhausted and**
- b) the employee alleges either that**
 - (i) Board policy has been violated to his/her detriment or**
 - (ii) Board policy does not adequately protect his/her human rights.**

INTERPRETATION:

Below is the text of the Complaint/Grievance Policy in place in our Manual. Rationale: see the rationale under EL 2.1.

V-A COMPLAINT/GRIEVANCE POLICY

In the interest of harmonious and cooperative working relationships, staff members are encouraged to discuss and resolve employee requests, suggestions, and concerns informally. When applicable, professional guidelines shall be taken into account in resolving disputes.

When a problem arises, an employee shall discuss it first with his or her immediate supervisor. It is the responsibility of each supervisor to conduct the discussion objectively and confidentially and to initiate action to resolve the problem. If, after such informal action, the problem is not resolved to the employee's satisfaction, he or she may present a written grievance in accordance with the procedure outlined below. The employee may request a third party to be present.

The intent is to resolve the grievance by the following outlined steps in the shortest time consistent with careful consideration. Time limits are listed for each step, but these can be extended slightly in the absence of the key parties or for other legitimate time problems.

Step 1:

Within five (5) calendar days from the date of the previous informal discussion, the employee shall present to his/her supervisor, the details of the grievance and the relief sought in a clear and concisely written format (usually less than one page

Step 2:

Within five (5) calendar days following receipt of the written grievance, the supervisor shall meet with the employee and discuss his/her concerns and respond in writing within five (5) calendar days of said meeting. The supervisor should review the proposed reply with the Executive Team before giving it to the employee.

Step 3:

If the response of the immediate supervisor is not satisfactory to the employee, he or she may, within five (5) calendar days, request in writing a meeting with the Executive Team. The Executive Team will review the case within 10 days and schedule the meeting as soon as possible. This meeting shall be confidential. The Executive Team shall render its decision within five (5) calendar days of the special meeting and its decision shall be final.

EVIDENCE:

We report compliance. No grievances have been filed since our last monitoring report. Disputes or other issues between staff have been handled by the staff members and their supervisors and have not blossomed into full out grievances. For example, issues surrounding problems recording CYRE attendance data were identified and addressed in June 2010. Program Administrator, Director of Religious Exploration, Business Manager and Minister met and agreed upon a new process which addressed concerns of both DRE and Program Administrator. All past data was updated in the database over the summer by Program Administrator; the new process was documented by the Business Manager. The new process will be monitored by both Program Administrator and DRE once the new church year begins. The Business Manager will also check in periodically to make sure the process is working well.

EXECUTIVE TEAM ASSESSMENT:

There was an all-staff retreat at the Temenos Retreat Center on June 3. The program focused on the Enneagram Personality test and how it can help the staff at First Unitarian Church

work together as a more effective team. The retreat was an opportunity for all the staff to come together and share some time learning about each others' works styles.

When the Hartford Company changed its procedures around choosing retirement investments, the Executive Team arranges for all non-ministerial staff who have money in the 403(b) plan to attend a morning seminar and a one on one consultation with a professional investment advisor free of charge to the church and the staff member.

The ET continues to be proud of our staff members. People work hard, and are committed to their jobs.

Respectfully Submitted by the Executive Team,

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Rev. Barbara H. Gadon
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