CANADIAN BAPTISTS of Ontario and Quebec

BUILDING SOUND HR PRACTICES:

A Workbook to Guide your Church

September 2018

TABLE OF CONTENTS

This handbook is adapted from the document: "A Handbook for Ministry & Personnel Team/Coordinators – The United Church of Canada," 2003 edition. Used with permission

DISCLAIMER: This guide is provided for information purposes only and is not intended as advice to the local church. Information is current only as of the date that the guide was prepared. Readers are advised to seek professional advice for their particular situation.

WELCOME

Within the Baptist tradition, it is understood that although the pastor will take the lead in teaching and guiding, the body of the church is equally responsible for the direction of the church and to uphold its core beliefs. As such, the church body is responsible for the oversight of their pastor and staff, providing support, guidance and direction. This workbook invites the congregation, often represented by a Personnel Team, to determine your unique needs as you assume your role of employer.

Your church should have a clearly defined program of personnel administration designed to meet the ministry needs of your staff and to provide fair and equitable treatment for all employees. The purpose of this workbook is to provide information to our member churches about Human Resources policies, procedures and practices for its employees This workbook outlines the personnel matters that affect most congregations and provides an overview of the main functions that need to be considered with regard to personnel issues. The government require employers—no matter the type of organization—to abide by specific rules and guidelines.

As an employer in Ontario you must abide by the Employment Standards Act (ESA) which outlines your rights and obligations as an employer and the rights and obligations of your employees. The ESA sets out the minimum requirements that employers must meet. This act is both for your protection as employer and for your employees. CBOQ suggests that you familiarize yourself with this document. The following workbook is designed to help you implement these rules in a meaningful way that meets your church's unique needs.

> **Note for Quebec Churches**: While this workbook uses legislation specific to Ontario, many of the practices recommended would be suitable for the Quebec context.

The handbook addresses many of the concerns that CBOQ congregations encounter as they work together with pastors, other ministry personnel, and support staff. It is not intended as legal advice, but rather a helpful workbook for making wise choices and establishing good processes based on best practices.

Throughout the workbook you will find "Discerning Questions"—questions designed to help you identify your church's needs and develop meaningful policies that benefit both you as employer and your employees. These, along with highlights, quotes and biblical references will help you to go deeper with the material presented.

Section 1 of this workbook will help you determine the role and responsibilities of the Personnel Team or Personnel Coordinator while Section 2 provides the basic policies that you will need as an employer. Section 3 provides instruction on creating your own policies. The appendices contain many valuable resources, tools and forms.

What are the key personnel functions that congregations need to address?

Overseeing the personnel matters of a congregation is an important task. It is a ministry in and of itself.

Within a congregation, there should be a confidential, consultative venue—either a team of people or an individual—that supports the main governing work of the congregation by being aware of, and addressing, employment issues for pastoral leaders and other staff (e.g. support staff, interns, interim ministers). The Personnel Team understand the roles and functions of paid and volunteer leaders, how they interact with one another, and how they impact the congregation's ministry.

As you work through this workbook you will develop policies and procedures that both reflect your church's vision and mission and that will support and protect your church's purpose. Tailored policies mirror an organization's focus and also protect it.

Personnel Team verses Individual Coordinator

Under most circumstances, the main governing board of the church (likely the deacons or elders in a Baptist congregation) has the ultimate responsibility for personnel matters. However, the governing board frequently identifies either a team or an individual to take leadership in managing these issues. They may choose an individual, a small team from within the larger governing body, or a separate team to oversee this work. In this document, those taking responsibility in this area will be referred to as the "Personnel Team."

To determine the need for a team or an individual coordinator some specific things to consider are time requirements and skill sets. Below are some questions that will help you identify the best fit for your church.

Discerning Questions:

- How many staff does your church currently have?
- After reviewing the responsibility list below (Section 1) what do you think is a realistic time investment that will be required of the personnel leadership?
- Of your church's top eight priorities where does personnel management fall? What does this imply?
- How comfortable is the board with laying the full responsibility of staff oversite on one person?
- What are your plans for staffing increases—numbers and timeline—will these plans impact the role of the Personnel Team?
- How many ministry teams are operating?
- Do you have one candidate that has all the skills needed for a successful coordinator or will a team better meet all these requirements?

Sometimes people taking responsibility in these matters experience the tension of being in a supportive role while, at the same time, carrying out supervisory functions. It is hoped that this handbook will help your Personnel Team clarify the roles specific to your congregations and build positive, trusting relationships.

The following section will help you further determine the roles and responsibilities of the Personnel Team.

Be shepherds of God's flock that is under your care, watching over them—not because you must, but because you are willing, as God wants you to be; not pursuing dishonest gain, but eager to serve; not lording it over those entrusted to you, but being examples to the flock. And when the Chief Shepherd appears, you will receive the crown of glory that will never fade away.

1 Peter 5:2-4 (NIV)

A note about terminology: For clarity, the use of the term *Personnel Team* refers to both a team or a coordinator. *Board* refers to a church's board of leadership within your church this may be your Elders, Deacons or Council. *Staff* refers to both ministry and administrative employees and can also apply to volunteers when these individuals have specific and structured responsibilities.

SECTION 1: PERSONNEL TEAM

Responsibility for Personnel Matters

Each congregation should identify an approach that best serves their context. The responsibilities which generally require a congregation's attention might include:

1. Providing a consultative and supportive agency for the staff of the congregation and for members and adherents of the congregation(s)
2. Reviewing working conditions and remuneration for the staff and make appropriate recommendations to the Board
3. Overseeing the relationship of the congregation's staff to its members and others
4. Overseeing the relationship between and among different staff members with respect to their responsibilities and authority
5. Consulting with staff about their development plans to encourage continuing education for eligible staff and supporting them by providing the requisite time and money
6. Providing accurate and regular feedback through structured Performance Management and annual evaluations of staff effectiveness in their positions and with respect to the mission of the congregation
7. Regularly review the responsibilities of each staff member and revise position descriptions when required or requested
8. Obtain a current police records check from each ministry personnel settled in or called to the congregation and any other documentation required for accreditation and security purposes

What Should be Considered when Choosing People to Serve in this Area?

Careful selection of those taking on these responsibilities helps to develop positive and trusting relationships between congregations and staff.

Staff should not serve on the Personnel Team. This restriction should also apply to immediate family members of Board. Members of the congregation who are currently involved in any kind of conflict in the congregation should not be asked to give leadership in this area of personnel management.

Those giving leadership in these areas of personnel matters are often people with:

- Knowledge of church policies and practices, and Baptist polity and your church's congregation
- Good interpersonal and communication skills
- Experience within the organization of the congregation
- Human resources or personnel training or experience
- Conflict resolution skills
- Strong organizational skills and a history of follow through
- Consistency and commitment to importance of leadership role
- Member of your church

Personnel leadership's buy-in to their role, as well as church policy will have a major impact on the success of this team and your staff. Take time to review any possible candidate's views on structured leadership and commitment to the standards that are required of employers.

Functions of the Personnel Team

There are many "employer/employee" models within our culture. CBOQ strives to exemplify employment relationships that reflect the underlying assumption that we are in ministry together. We want to reflect the values of the reign of God within all our dealings together: justice and grace, fairness and forgiveness, and, above all, Christ-like love. The careful work of a Personnel Team is vital in promoting harmonious relationships within and among staff and the congregation.

Remember that the Personnel Team can only recommend action to the Board. It does not, for instance, promise salary increases or initiate dismissal, however it can recommend such actions.

A list of responsibilities includes:

- Clarify staff responsibilities (job description created based on outlines given by the Board), lines of authority and accountability, and review position descriptions
- Review with all staff members their salaries, allowances, benefits, honoraria and working conditions, and make appropriate recommendations to the Board, prior to the beginning of the regular budgeting process
- Consult with all staff regarding continuing education plans and needs, and make recommendations to the Board to ensure that time and money are made available
- Develop Performance Management Plans with all church staff
- Provide support and facilitate two-way communication between all staff and the congregation and between staff members
- Educate the Board and its committees as well as the congregation(s) of the nature of the Personnel Team's role

It is often helpful to create a document that outlines the Personnel Team's responsibilities, commitments and vision to guide the team's time together and give intentionality to your interaction with staff.

What Personnel Matters Should be Reported to the Board?

Regular reports to the Board should include:

- Remuneration, including salary, housing and benefits
- Terms of employment of staff, including working conditions
- Keeping the Board informed about areas of concern (if any) relating to the job performance of staff
- Matters arising from Performance Management
- Performance Management Plans and process
- Changes to staff position descriptions
- Goals and objectives of staff as they relate to the mission statement and the goals and objectives of the congregation
- Results of any specific work requested by the Board
- Continuing education plans for all staff
- Vacation schedule for staff
- Wider church commitments of staff

Confidentiality and Accountability

Confidentiality and accountability are vital in dealing with any personnel matters. Personnel Teams do their work in a confidential manner, remembering that they are accountable to the Board and in relationship with staff and the congregation.

In order for the Personnel Team to do its work effectively, active and open dialogue on the part of both Board and committee members is essential. The goal is to achieve an environment of mutual trust where clear messages will be given and received, and helpful relationships will be established for the furthering of the church's ministry and mission.

Standards for confidentiality need to be negotiated and agreed upon by the Personnel Team and staff members and shared with the Board and the congregation(s). It is important to be clear about what can and cannot be shared more widely. For instance, any matter which is brought to the Personnel Team in confidence by the staff or a member of the congregation should be kept in the strictest confidence until the individual agrees to a wider sharing of the information, unless an individual's safety is at risk because of the issue being shared (such as someone revealing tendencies toward suicide, violence toward another person or child abuse of any kind).

Concerns for confidentiality and protection of personal privacy of individuals should be balanced by concerns for accountability. See Section 2 for further specifics regarding Confidentiality and Conflict Resolution. The Personnel Team must be very clear about undocumented allegations or anonymous complaints. The Personnel Team must not consider anonymous or undocumented complaints.

The Balancing Act of the Personnel Team

Giving leadership for personnel matters requires balancing a number of roles. The following four sections outline these roles more fully.

The Consultative Role of the Personnel Team

Effective Personnel Teams understand (but do not determine) the mission strategy and ministry of the church and primarily act as consultants to the Board and to staff. It is not the job of the Personnel Team to create position descriptions. Rather, the job is to continually coordinate between staff position responsibilities, ensuring that they are in line with the mission strategy of the congregation, and to respond to changes. Where a strategy or position description is missing or is out of touch with current experience, the Personnel Team will refer the concern to the Board with recommendations for action.

Another role of the Personnel Team is to support ministry personnel and staff through prayer, encouragement, providing regular opportunities to listen to staff, and ensuring they care for themselves. Also, encourage staff to have personal support systems outside the Personnel Team.

> He made me into a polished arrow…
> Isaiah 49:2 (NIV)

The Educational Role of the Personnel Team

Another role of the Personnel Team is to help staff build and maintain healthy relationships with the congregation. Working in a congregation can be challenging when members of the congregation voice (directly or indirectly) opinions and feelings about how things are going within the congregation. Staff can feel as though they have many "bosses" and feel pressured by suggestions and demands of each congregational member. Members of the congregation may also voice opinions about the staff themselves and how they do their job.

Work towards ensuring that there is a climate in the congregation where constructive feedback can be offered and received in a positive way. Gossip, and the reluctance to discuss issues in the appropriate committee, or decisions made outside the decision-making structure of the congregation, are often the most destructive forces affecting working relationships between staff and the congregation. Take responsibility to ensure that feedback about work performed rises above gossip and hearsay and becomes a positive development in the congregation that allows for direct discussion, explanation, improvement or change.

It is important for the Personnel Team to ensure that everyone in the congregation understands the process by which issues can be raised. There must be a consistent, clear, and well-publicized process about how concerns can be appropriately raised concerning the staff. It will be the committee's job to address situations when this is not done responsibly. Developing and publicizing a process for raising concerns in the congregation is crucial. Be sure the ministry personnel, staff and members of the congregation know that this is the venue for raising issues about evaluating effective ministry or working relationships in the congregation.

Tools available to help with this role:

- Host workshops with the Board to outline standards for personnel issues and decision-making in the congregation
- Make regular presentations during worship services or at congregational meetings
- Provide the Board with regular reports on your work

The Conflict Resolution Role of the Personnel Team

From time to time, conflict does arise. The Personnel Team has a role in encouraging conflict resolution or, if necessary, mediation. When concerns are raised, or conflicts are identified, a process of hearing each side fairly is essential. The Personnel Team can serve that need by testing the legitimacy of the concerns in a confidential context. However, in a situation of serious conflict, it is recommended that the Personnel Team consult early with CBOQ. There are resources available within our family of churches to help deal with conflict constructively. The sooner the congregation invites help, the more likely the conflict will be resolved in a satisfactory manner.

Interim Ministry

Interim Ministry offers intentional service to congregations experiencing a change, conflict, grief and/or reorientation. During interim ministry, the Personnel Team continues to have a role with the interim minister related to specific employment issues (e.g. vacation, continuing education, etc.) and concerning the inter-relationships of staff and volunteer leaders. The actual tasks and focus of the interim ministry may be overseen and monitored by the Personnel Team or by another.

Multiple Staff Ministries

Issues of equity are important in multiple staff situations. From time to time, the Personnel Team may be called on to help resolve issues around working relationships between staff members. In all these cases, care must be taken to insure fairness to all parties involved, with special attention being given to correcting imbalances of power, and with regard to confidentiality and maintaining positive relationships within the congregation as a whole.

The Role of CBOQ

CBOQ exists to equip our churches and leaders to engage in their mission from God in their community. CBOQ supports local churches and their communities by training leaders, supporting innovative ministries, responding compassionately to social needs, responding to crises and providing churches with administrative and financial services. In partnership with our local churches, CBOQ also plays a collaborative role in seeding new expressions of church for today.

Please contact CBOQ with any of your Human Resource needs and questions. We are here to support you in the ministry God has laid before you.

In Conclusion

Whether, as a Board, you decide one individual or a team should head up your church's personnel needs, it is vital that you fully equip and support the Personnel Team in all their efforts and champion their work. Caring for and directing a staff is a challenging role but it pays out dividends

> Now the overseer is to be above reproach, faithful to his wife, temperate, self-controlled, respectable, hospitable, able to teach, not given to drunkenness, not violent but gentle, not quarrelsome, not a lover of money.
>
> 1 Timothy 3:2-3 (NIV)

SECTION 2: EMPLOYER RELATIONS AND GUIDELINES

The Employment Standards Act, 2000, or ESA, sets out the minimum standards for most employees working in Ontario. It details the rights and responsibilities of employees and employers. The ESA covers a wide range of employment standards including: minimum requirements for employment; provisions to assist employees with family responsibilities; and, mechanisms for compliance and enforcement.

Please note the ESA is not the only legislation by which employers must abide. Not covered by the ESA are the Occupational Health and Safety Act, Labour Relations Act 1997, Pay Equity Act, 1995 and the Human Rights Code. Please refer to the original legislation for clarity and/or seek counsel from an employment lawyer.

This section will help you build policy that both meets your legal requirements as an employer as well as your unique needs within the church context. Standard policy format begins with a clear intent followed by specific guidelines. As you work through the following section you will be able to produce your own meaningful and helpful policies that make sense for your context.

The Personnel Team can use much of the language used below to build your own policy and procedures. Section 3 gives you the tools you need to formulate an intentional and valuable policy. Take time to work through the discerning questions and view the call outs as these will help you shape useful living policies and not create a dust collecting manual.

Employment

Recruitment

CBOQ churches are encouraged to practice equal opportunity and fair hiring processes when filling positions. Candidates for employment with your church should be committed to the mission and values of your church. The successful candidate will be the one who best meets all the job requirements of the position and fits with its culture. According to the ESA, during the recruitment process your church will need to provide suitable accommodations to all applicants. This policy is to ensure that all employees and potential candidates are considered for employment opportunities in a fair and consistent manner.

Discerning Questions:

- Do you have clear core and operational values? How would these shape your recruitment process?
- Explore how these might play out in a new staff role.
- What types of candidates are you looking to apply to this position? Where would you potentially find them?
- Who has the authority to request a new position?
- Who has the authority to vet applications and set up interviews?
- Under what circumstances will a search committee be instituted?
- What are the realistic (needed and fitting with your pay range) minimum qualification for a successful candidate?
- How will you rate, or weigh, various attributes or offerings? Are skills more desirable than personality; member of the congregation over job fit? Is this a balancing act or a dichotomy?

Best Practices

Job postings should include the job's scope, core competencies, responsibilities and qualifications. Refer to the section on job description creation for more information.

Refer to your church constitution or letter of incorporation before posting a position as some bylaws require you to first post job openings internally before accepting external applications.

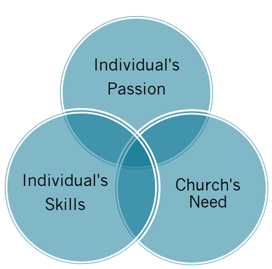
A helpful task is to create a list of places to post your job openings. CBOQ has a job posting page on our website. Area associations, Christian universities and colleges also have vehicles for reaching potential applicants. One can also access ministry information profiles posted by CBOQ pastors by contacting the CBOQ office.

Interviews

Interviews should be planned, scheduled and conducted in consultation with the Personnel Team. For some positions, a search team can be utilized. All hiring decisions are made in accordance with hiring authority. Often, this will entail ministry positions being voted on by the Board and administrative positions being directly approved by the Personnel Team. Applications and resumés of applicants that were not selected for employment should be stored, for a length of time to be determined, to ensure the appropriate retention of information.

Discerning Questions:

- Who are the individuals, the stakeholders (those with a vested interest in the success of this role/those who are affected by this position)? How will you include them in this process?
- Who will interview the potential candidate?
- How will you determine where to post the job description? How will these locations impact the type of candidates you will attract?
- How will you shape your interview? What information is most important to glean?
- How will you address issues stemming from unsuccessful applicants (especially church members and family members?)
- How will the following infographic shape how you create and fill positions within your church?



Probationary Period/Offer of Employment

For some roles, an Offer of Employment should be contingent on both a Criminal Record Check and a Vulnerable Sector Screening. Prior to commencement of employment, an individual should already be security cleared or have provided documentation proving they have requested a Criminal Record Search and a Vulnerable Sector Screening from their local police station. Any findings which appear on either the Criminal Record Check or the Vulnerable Sector Screening would be reviewed on a case by case basis by the Board. You should consider the specific conviction in light of the role in question. As an employer you can reserve the right to revoke an Offer of Employment if it is deemed that a conviction will have a negative impact on the church's confidence in an employee's ability to carry out the job responsibilities.

Offer of Employment

A well thought out letter, or Offer of Employment (employment contract), can ensure that expectations with respect to performance, compensation and termination on the part of both the employer and the employee are clear at the beginning of the employment relationship.

The items that should be included in an Offer of Employment are as follows:

- Legal names of each party, including addresses
- Commencement date
- Description of "job functions" (usually included as an Appendix)
  - Define scope of job duties
  - Responsible and reporting to
  - Working hours per day and week
  - Overtime
  - Position if to have additional titles
- Description of any expectations
  - Lifestyle
  - Performance management
  - Personnel policies
  - Full-time (ability to earn income at other sources or to hold offices in other organizations)
- Term of employment
  - Open-ended
  - Fixed contract (time or project)
  - Options for renewal

- Compensation and benefits
  - Salary
  - Benefits/insurance/pension
  - Allowances for vehicle, housing, expenses, books, study leave, vacation, conferences, continuing education, sick leave
- Copyright/Intellectual property
  - Property ownership (Music, texts, books, articles)
  - Who owns
  - Whose compensation
- Discipline process
  - Cross reference denominational process, as applicable
- Termination of agreement
  - By whom
  - How (written notice)
  - Timeliness of notice
  - Ground for termination
  - Compensation provision (may be minimum provided by law)
- Resolution of disputes/interpretation
  - Mediation
  - Arbitration
  - Litigation

CBOQ recommends that you review your draft with legal counsel before outset of employment relationships. An Offer of Employment is a vital tool and it is highly recommended that new staff sign this document before they commence their new role. This agreement protects both the staff and the church. In the unfortunate event that employment must be terminated, this agreement will give you clear parameters that will guide the transition. Appendix A provides a sample Offer of Employment.

Onboarding a New Employee

This checklist is intended to help the Personnel Team in your preparation and hosting of your new employee, specifically in their first week of employment. Prepare to be present on the staff's first day to provide a detailed orientation and ensure they are settled into their space and role. As many staff will work with few colleagues or have few regular daily interactions it is important that they feel connected to the larger church body and the Personnel Team. This is an opportunity to take the new staff out for lunch and get to know them personally, which will help inform your leadership of them.

Schedule a specific meeting at the end of the first week to introduce the new staff member to the Performance Management process to guide them in their new role.

During the first month of employment, plan on meeting weekly with a new hire. After the first month, it is helpful to meet at least bi-weekly with staff. Not all meetings need to be extensive. A 5-minute check-in can be effective and show the staff you are committed to their success.

- Ensure the new hire's desk, computer, copy codes, and supplies are set up and ready for them on the first day—it gives the new hire a feeling of value and belonging
- Give the new hire a tour of the church space, offices and community
- Introduce the new hire to their new co-workers. This may require you to schedule other staff to be onsite for this meeting
- Introduce the new hire to the church treasurer, IT support person and the various committee leads with which their role will bring them into contact
- Introduce new staff to the Board at the first scheduled meeting
- Announce new hire to church congregation and, if appropriate, introduce them during a service
- Assign a go-to person to answer simple questions for the first week/month–it allows for immediate answers

Position Descriptions

The Personnel Team is responsible for ensuring that all staff have current and accurate position descriptions. Increasingly, congregations are finding it helpful to develop position descriptions for volunteer leadership positions as well. This process allows the Personnel Team to build in accountability for those positions by forming relationships with volunteer leaders as well as with paid staff.

Assume responsibility for reviewing position descriptions regularly and making recommendations to the Board when revisions are required. A resource entitled, "The Guidelines for Developing Ministry Personnel Position Descriptions" is included as Appendix B. As well, a Position Development Questionnaire is included as Appendix C.

Often, initial position descriptions for staff members are developed by the committee(s) and staff that share in their oversight, in consultation with the Personnel Team. This process may also require consultation with staff as appropriate, for example: the property committee for the caretaker or the music and/or worship committee for a minister of music.

The Personnel Team would also assume responsibility for reviewing these position descriptions regularly and for recommending appropriate revisions. This may suitably happen as part of the performance management process.

Volunteer secretaries, organists, choir directors, and church school leaders should also have written position descriptions.

Discerning Questions:

- What are the gaps or needs that have inspired the creation of this position?
- What is the budget for this position (include in calculation salary, employer deductions/ contributions, overhead/equipment costs etc.)? This will give you a sense if the church can fund a full or part-time position and if the desired tasks will be accomplishable within that context.
- To whom will this position report?

Performance Management

Performance management ensures that all staff members are provided with accurate, appropriate and regular feedback regarding their performance within your church.

Performance management shows that your church values its staff team and will endeavour to aid in employee achievement of professional goals. The system can be utilized as a tool to help ensure the alignment of individual goals with that of the strategic direction of your church through the use of collaborative planning, coaching and feedback and regular performance reviews. Taken into consideration is any individualized accommodation plan in order to ensure suitable materials, processes and expectations are achieved. In addition, if employees require a different level of support, they are encouraged to bring forward their request for accommodation. Your church should strive to provide suitable accommodation as it relates to the employee's disability. Records of individual performance plans and reviews should be kept on file for each staff team member.

Performance management is on-going and cyclical in nature with the process being broken down into three interrelated phases of planning, coaching/feedback (one-to-ones) and review.

In larger churches with a hierarchical structure, this process may be conducted by an employee's direct supervisor (e.g. Church Administrator or Administrative Assistant etc.). However, for most churches this process will be managed by the Personnel Team and so, for the purposes of this section, Personnel Team and supervisor can be used interchangeably.

> So Christ himself gave the apostles, the prophets, the evangelists, the pastors and teachers, to equip his people for works of service, so that the body of Christ may be built up…
>
> Ephesians 4:11-16 (NIV)

Planning

The Personnel Team would collaborate with employees to review job requirements (including an annual review of the job description) and develop performance expectations in the form of documented performance goals. Areas of responsibility would be utilized to aid in creating individual performance plans. A Performance Plan Template (see Appendix D) has been developed to aid in developing employee performance goals. Goals should align with the church's organizational goals and objectives.

Each Performance Plan would include the following information:

- A set of specific goals for achieving the requirements of the job
- An action plan or outline of how these goals will be met; this may include plans for training and development
- A time-frame for when goals should be met by the employee
- Additional comments and areas of concern or anticipated restraints

Performance plans should be created and updated on a regular basis, based upon prior performance, length of time with the church and recent promotions or significant changes in duties and responsibilities. The performance plan can be utilized not only to establish performance goals but also to act as a tool against which actual performance can be measured.

It is recommended that new, probationary employees have a Performance Plan created within their first week of employment. A formal review should be held at the end of the probationary period or earlier if the employee is exhibiting performance problems. Performance plans should be updated at least every six months for each employee who is no longer considered probationary and is not exhibiting any performance problems.

Once created, both the employee and supervisor should sign and date the Performance Plan with a copy remaining with the employee, one with the Personnel Team and another to remain on the employee's file. The Performance Plan is a living document and should be re-visited and revised as part of your regular one-to-ones to assess individual achievement.

Discerning Questions:

- Romans 1:1, James 1:1, 2 Peter 1:1 all refer to Apostles as 'servant'—a reference to their role as caretaker and not owner, student not teacher. These passages refer to the origin of our purpose. With this in mind, how will servanthood shape how you manage church staff?
- Managing within a Christian context can be challenging. Often the concept of grace is misinterpreted to suggest correction is un-Christ-like. What is your church's spoken and unspoken stance on staff management? Refer to your constitution or statement of faith to clarify your church's stance on discipleship and discipline.
- 'Truth spoken in love' what would this look like in action within the Performance Management context?
- Taking a truthful look at your church, how committed is the leadership to employee development and guidance? Is this something that your church would like to address?
- How could this self-evaluation shape your Performance Management practices?

Coaching and Feedback

Coaching is continually utilized as part of a good performance management practice. Coaching is part of the informal and formal feedback pertaining to the progress of the employee towards their established goals.

> The best minute I spend is the one I invest in people.
>
> Kenneth H. Blanchard

It is recommended that formal feedback occur at least every six months. The Job Performance Progress Check in Template (see Appendix G) can be used for these formal feedback sessions. Formal feedback sessions should be scheduled more frequently as required based upon the individual's performance and length of time with the church and within a specific role (as described above under Planning). The formal feedback session allows for discussion of the employee's progress towards established goals. Performance concerns may be addressed and the Performance Plan may be altered. As goals are revised, accomplished and created, Performance Plans should be updated.

In addition to formal check-ins, the Personnel Team and employees should have regular, informal one-to-ones, designed to foster ongoing coaching, feedback and continuous performance conversations. See Appendix F for a model of a Performance Plan.

Review

As goals are achieved, the Personnel Team reviews the process and performance taken to achieve the goal, while the employee conducts a self-review based on the same. This type of review process will aid in the creation of new goals and development of the employee. See Appendix G for a model of an Effective Feedback Tool.

Confidentiality

All information, including performance management forms and discussions in performance management meetings, should be kept strictly confidential. All forms utilized for the performance management process should be signed and kept in the employee's file.

Commitments

For the performance management system to work well, all sides need to commit to its success. Below are some suggested commitments that can help guide the development of your own system.

The Personnel Team will:

- Provide a performance management process that is fair and transparent
- Continually review its performance management practices
- Work with their employees to ensure fair and attainable performance goals are established
- Ensure the creation of Performance Plans for their employees within the specified time frames
- Provide ongoing feedback and performance review to employees in the form of formal and informal one-to-one meetings
- Accurately report and document performance observations

Employees will:

- Work with the Personnel Team in the creation of Performance Plans
- Prepare for and participate in formal and informal one-to-one meetings with the Personnel Team

For by the grace given me I say to every one of you: Do not think of yourself more highly than you ought, but rather think of yourself with sober judgment, in accordance with the faith God has distributed to each of you.

Romans 12:3 (NIV)

Recognition

Recognition is an integral part of your Performance Management plan. Celebrating successes encourages your staff and congregation in the spirit of a joyful heart. It also allows the congregation a glimpse into the hard work of your staff.

You may wish to make this a formal process detailing type of recognition for specific landmarks, such as a specific dollar amount or equivalent gift for 10 years of service. In addition, you may wish to have casual celebrations, such as lemonade on the lawn, to celebrate ministry teams meeting established goals. Whether casual or formal, for landmarks to celebrate successes, it is important to be intentional and fair.

CRA and Cash Gifts

Please note a cash gift or award that you give an employee is considered a taxable benefit. CRA's policy allows an employer to provide a non-cash gift or award, which may not be considered a taxable benefit under certain circumstances.

Help people to reach their full potential.
Catch them doing something right.

Kenneth H. Blanchard

This policy allows a church to give pastors and employees a non-cash gift for special occasions such as Christmas, a birthday, a wedding, the birth of a child, or a similar event as well an award in recognition of employment achievements. If the non-cash gifts and awards have a combined total value of $500 or less annually, the amount does not have to be included in the employee's income.

If the cost of each non-cash gift or award is more than the $500 limit, the church is required to include the full fair market value of the gift(s) or award(s) in the employee's income. If the church gives an employee more than one gift or award in a year and the total cost is over the $500 limit, then the church may have to include the fair market value of one or more of the gifts in the employee's income, depending on the cost of each gift or award and the number of gifts or awards given in a year.

Some church congregations collect personal gifts from their members for the pastor at Christmas time or for other special occasions. These churches give what they collect directly to the pastor. The amount is not included in the church's income or expenses, and individual donors do not receive a donation receipt for them. In this case, individuals are usually providing the gift not to recognize pastoral services that the pastor has provided, but in recognition of the personal relationship that develops between the pastor and the congregation member. This process is acceptable if the gift is reasonable in the circumstances and this method is not used to give supplemental compensation to the pastor.

Discerning questions:

- What would your church classify as landmarks?
- How do you want to celebrate landmarks?
- Will you use standard 'gifts' or tailor the gift to the recipient?
- Will you look to for successes to celebrate?
- How can celebrations be utilized to build community? To encourage your staff and inspire further successes?
- What is the balance or tension between celebrating the efforts of an individual while recognizing God's handiwork?

Human Rights Policy

Human Rights Policy is to ensure the church provides a working environment for all employees that fosters openness and tolerance. This policy is intended to ensure that your church's practices and the practices of all employees are free from direct and indirect discrimination. Under the Human Rights Code, employers have the ultimate responsibility for ensuring a healthy and inclusive work environment, including preventing and addressing discrimination and harassment.

Accessibility in Employment

CBOQ is committed to providing accessibility across all stages of the employment cycle and encourages all of its member churches to commit to removing barriers and creating a workplace that is accessible to all job candidates and employees. Any applicant to your church that communicates the need for accommodation should be considered in a manner that is non-discriminatory, and respectful of human rights obligations. If the candidate is successful in their application for employment, further accommodations may need to be made in order to ensure their success in the role.

And David shepherded them with integrity of heart; with skillful hands he led them.

Psalm 78:72 (NIV)

End of Employment

The way you end can be as impactful as the way you begin. When handled with grace and compassion, the process of ending employment can be a valuable learning experience for both church and employee.

The Employment Insurance (EI) program is designed to promote job creation, adequacy and fairness. One of the biggest aspects affecting churches and pastors is how the Voluntary Quit and Misconduct provisions are applied. The Canadian Council of Christian Charities (CCCC) worked on CBOQ's behalf to clarify with the government how pastors should be treated, recognizing that it is always more appropriate for a pastor to resign than to be fired. EI has provided some guidelines for completion of the Record of Employment (ROE) of which you should be aware. Following these guidelines will ensure that your pastor's case is adjudicated appropriately and that he/she will be eligible to claim EI benefits based on the circumstances surrounding the resignation.

When an employee resigns, the individual must show that there was just cause for leaving in order to be eligible for EI. Instructions for completing the ROE are available online from Employment and Social Development Canada.

By law, you are required to issue the ROE within five days of the staff's last day worked. If the ROE is late, benefits will be delayed, which could cause hardship. You should advise the staff to file immediately after the last day worked—without waiting for the ROE if it is not yet available. Box 16 of the ROE requests a reason for resignation. In many cases, the reason will be very clear. When the reason is not clear or when one of the just causes is present, EI advises that you should use Code K – Other.

EI advises that in all instances where Code K is used, an investigation will take place. It is important that the name and phone number of a church contact is provided. This should be someone who knows and understands all of the circumstances surrounding the staff member's resignation. This person will be interviewed by telephone and should be able to present the facts as understood by the church.

Termination of Employment

Church-initiated termination of employment may become necessary for one or more of the following:

- The employee is not performing satisfactorily and has not demonstrated the willingness or capability to perform at satisfactory or acceptable levels
- The employee's position has been discontinued and reasonable alternate work is not available within the organization
- Financial constraints experienced by the church necessitate staff reduction(s)
- Working relationships with other employees are inadequate to a degree that they hinder the effectiveness of the organization
- The employee's lifestyle is found to be incompatible or in clear contravention with the church's mission and values
- Dismissal for cause; for example, when an employee is guilty of wilful misconduct or wilful neglect of duty

Where termination is for performance inadequacy, or due to unsatisfactory working relationships, documentation will need to show that oral and written communications have been made to the employee in an attempt to identify the inadequacy, to specify the level of performance required, and to assist the employee to improve and achieve the desired level of performance.

An employee's Offer of Employment should set out guidelines for navigating this transition and provide clear reasons for termination and each party's responsibilities/rights. Appendix A provides an example of an Offer of Employment.

Authority to Terminate

All decisions to terminate should be made by the Board on the recommendation of the Personnel Team after following appropriate consultations.

Notice of Termination

Written notice of termination should be given to the employee as required by current legislation. In the case of dismissal for cause, no period of notice or severance allowance is required.

Please note: Each termination is different and can be complicated to navigate. Please contact our offices once the decision to terminate has been made as CBOQ can provide invaluable support in this process. In addition, the Board is encouraged to seek out legal advice in the preparation of notice of termination.

Exit Interviews

Exit interviews are held as staff members leave their positions in a congregation to move on to another call or employment. This type of interview is becoming more and more common in our congregations. Some Associations are prepared to provide outside resources to conduct these exit interviews if this sort of objectivity and distance is deemed preferable. Contact the CBOQ office to find out if such a resource is available in your area.

When a non-pastoral staff person is leaving, it is appropriate for the Personnel Team to recommend to the Board that an exit interview be conducted. Given its responsibility for the staff's Performance

Management, it is appropriate for the Personnel Team to do the interview. Note all issues that may be helpful in the hiring process of future staff members.

See Appendix H for a sample exit interview. This is a great opportunity to determine what information you would like to gather and how this might impact your work as the Personnel Team.

Discerning Questions:

- What is the 'Number 1' question you have for a staff as they leave their employment with your church?
- Do you want feedback on all areas of church life or only areas that pertain to their role?
- What kinds of tools would you use to capture this information?
- How would you qualify the information you have gathered?
- What will happen to the information gathered? A report to the board? An action plan?

Compensation and Benefits

Compensation goes beyond financial remuneration and includes other items such as an education fund, sabbatical provision and vacation days.

Entitlements

Annually, CBOQ sends a "Recommended Minimum Salary Guideline" to all its churches. This guideline suggests a salary minimum for pastoral staff based on years of education and experience, as related to our accreditation system. While our polity is clear that each congregation is at liberty to decide such matters independently, we offer this guideline in order to encourage just and equitable salaries for all our ministry personnel.

All employees should be paid within established salary ranges for the job they are performing. The pay ranges should include a range minimum, midpoint and maximum, with the range minimum forming the starting salary for someone new to the role and the range midpoint for employees proficient in their role. Salary ranges should be reviewed regularly to ensure they remain fair and to consider the financial impact of any changes to the position. See Appendix I for an example of the annual recommended minimum salary guideline document.

The Personnel Team ensures that the remuneration or financial compensation package promised to staff is honoured throughout the pastoral or employment relationship. This can be done by regularly reviewing these items and by bringing recommendations to the Board. The Personnel Team will want to keep copies of the original Offer of Employment between the church and personnel for reference in dealing with these issues.

Pay increases should be considered on an annual basis, upon review of predetermined individual- and organizational-related performance criteria. As such, a compensation strategy with respect to salary ranges and adjustments is a helpful tool.

Clergy Residence Deduction

According to CRA requirements, this deduction applies to accredited clergy who are employed full time. Your church may decide to include in the staff compensation package a Clergy Residence Allowance component. In accordance with Income Tax provisions relating to clergy housing, it should be the responsibility of each such employee to determine the portion of their salary to be allocated as Clergy Residence Deduction when filing income tax. This is based on fair rental value—it is appropriate to obtain several real estate estimates. The employee must then notify the Board and treasurer of that amount, in writing, for purpose of deductions from pay.

Continuing Education and Professional Development

One full week (including Sunday) of continuing education each year is commonly one of the terms of call, settlement or appointment for all ministry personnel. Ministry personnel should be encouraged to avail themselves of their week each year. Plans for continuing education are generally arranged in consultation with the Personnel Team which then make the necessary recommendations to the Board. The interests and priorities of the congregation—as well as those of the individual—need to be considered when plans for continuing education are discussed.

All employees can benefit from some form of continuing education that can assist with further learning. It is in the best interests of a congregation to provide time and funding for the professional development of all church staff (e.g. a desktop publishing course for a church administrator).

Sabbatical Leave

Many congregations provide a plan for ministerial staff to have a sabbatical period after five to 10 years of service. The prevailing wisdom seems to indicate that a period of three months provides a good break, without creating a serious disconnectedness with the congregation. Some congregations are providing three months at the five-year point in a ministry tenure and another three at the seven-year mark, for a total of six months in a seven-year period. In most cases, the congregation will pay for regular salary during the sabbatical. Some congregations also make funding available for extra costs associated with the sabbatical.

In some cases, congregations establish a fund at the time of calling a pastor and pay into this fund as time goes by, so that when the sabbatical arrives, the accrued funds will help with the costs. Sabbatical leaves should provide opportunity for the minister to learn and experience new things in ministry, whether through formal educational experiences or through a personally developed plan.

The plan for a sabbatical leave should be processed with the Personnel Team, usually at least a year before the planned sabbatical, and preferably as part of the Offer of Employment established when the pastor begins their service with the congregation.

Employment-Related Regulations

The church is obliged to comply with a wide range of government regulations. Compliance concerns include: Income Tax, Canada Pension Plan (CPP) and EI withholding and remittance and record keeping.

Remittances

The Church, as employer, is required to pay its mandated share of CPP (or Quebec Pension Plan) and EI premiums. These payments, together with the employee source deductions from payroll, are required to be remitted to the Canada Revenue Agency.

> When exploring the development of a new position, be sure to calculate not only the salary in your budget, but also the remittances and employer contributions.

These are sometime referred to as MERC or Mandatory Employee Related Costs. There are many helpful tools found on the internet to help figure out the total remittances for which an employer will be responsible.

Tools available to help with these issues:

- Many documents concerning payroll and benefits are available at our website at baptist.ca/treasurers
- Resources from agencies and regulators (such as Canada Revenue Agency, Employment and Social Development Canada, Employment Standards Act, etc.)

Pension Plan

The Canadian Baptist Pension Plan (CBPP) is available to all employees of member churches who earn a minimum of $19,565 annually or work 700 hours per year. It is a defined contribution plan administered by Sun Life Financial. This is to be calculated as 6% of salary to be contributed by the church and 6% deducted from the staff's salary for a total remittance of 12%. By law these funds must be remitted monthly to Sun Life. The church is obligated to offer this Plan to its employees but participation may be waived at the employee's request. A waiver form can be obtained from CBOQ. The signed waiver must be submitted to the CBOQ office and Sun Life. The church has the right, for non-pastoral staff, to delay eligibility for one year. It is the church's responsibility to advise employees of their eligibility. Enrolment forms are available the CBOQ website.

The Pension Plan is a defined contribution plan. The plan is managed by the Pension and Insurance Committee, to which CBOQ appoints three representatives. The Committee meets a minimum of two times per year to hear reports from the consultants and investment managers and to provide overall coordination and governance of the plan.

Group Insurance and Health Benefits

CBOQ offers a group benefit plan, which is a compulsory plan for all employees who work more than 20 hours per week and are not covered by any other health care plan (i.e. spousal plan). It is the church's responsibility to ensure that the plan is offered to the employee and that a waiver is signed and kept on file if the employee declines coverage. Further details and application forms are available through J & D Benefits. Because CBOQ is part of a wider plan, churches are not at liberty to make changes to the coverage provided.

All basic benefits are employer paid and should not be withheld from the employee's salary. The basic plan provides for life insurance, dependent life insurance, healthcare, dental care, and long-term disability. Coverage for these benefits is provided through Great West Life.

Accidental Death & Dismemberment

This is also part of the basic Group Benefits Plan. AD&D is provided through ManuLife Financial.

Employee Assistance Program

A confidential counselling program is provided through Shepell for plan members and their families. Shepell provides a comprehensive program to our members simply by calling and indicating that you are a member of the CBOQ plan. To receive assistance, call 1-800-268-5211 or go to their website Shepell.com.

Optional Group Life Insurance

If the employee selects the Optional Life Insurance coverage this is an employee paid premium.

Statutory Holidays

When a statutory holiday falls on a Saturday or Sunday, the Holiday should be observed on the Monday following, as per the ESA. It is standard practice to assign an additional holiday when Christmas Day and Boxing Day fall on Saturday and Sunday respectively.

Ontario list of statutory holidays:

- New Year's Day
- Family Day
- Good Friday
- Victoria Day
- Canada Day
- Labour Day
- Thanksgiving Day
- Christmas Day
- Boxing Day (December 26)

Full-time employees are generally granted the above statutory holidays with pay. You may want to include other holidays that staff receive throughout the year, separate from their vacation entitlement. At times, the church may require employees to work on a public holiday in order to fulfill operational requirements. In such cases, the employee is entitled to substitute another day that would ordinarily be a working day to take off work. Part-time employees are entitled to substitute a regular workday for the public holiday when any of the above holidays occur on a day that the employee does not normally work. The substituted day must be no more than three months after the public holiday.

Vacation Leave

It is recommended that a church provide one-month of vacation each year for pastoral staff and three weeks each year for other staff, pro-rated for the first year. Outstanding vacation pay is due upon termination. Consideration should be given to additional weeks of vacation for number of years served. Staff should be strongly encouraged to use their entire vacation entitlement each year. Your church may want to consider how many vacation days can be carried forward to the next year. In addition, it is important to formally account for vacation days taken and accrued, as outstanding vacation days must be paid for upon the end of employment.

Other Absences from Work

There are many reasons staff may need to be absent from work. As long as you meet the minimum requirements of Employment Standards Act (ESA) you can use your discretion as you create a productive and flexible work environment that benefits the mission of your church. You can review the ESA webpage or contact the CBOQ head office for further details. Below we have included information for three of the most commonly used leaves: sick leave, personal emergency leave and pregnancy/parental leave.

Sick Days

It is recommended that a church adopt a paid sick leave policy for their staff. The following is offered as a guideline: An employee shall receive credit for 15 days paid sick leave per year. Unused sick leave credit will be allowed to accumulate from year to year to a maximum of 85 days. Accumulated sick leave is forfeited at termination.

This is a recommendation, as paid sick leave is not mandated beyond the two paid days regulated by the Personal Emergency Leave policy newly implemented by the ESA.

Personal Emergency Leave (PEL)

According to the ESA, employees are entitled to 10 PEL days per year, with two of those days being paid. These days do not accumulate. If there is already a sick leave policy, then the two paid days for PEL can be part of that, if the definition your church uses of "sick" is broad enough to include the PEL definition (see below).

Personal emergency leave is unpaid job-protected time off work for up to 10 days per calendar year. The first two days must be paid. The remaining days taken are unpaid leave. This leave may be used for personal illness, injury or medical emergency or for the death, illness, injury, medical emergency or urgent matter relating to a dependent or family member. Emergency leave is not intended for scheduled routine doctor, dentist, other health practitioner visits. The policy is outlined in further detail with very helpful examples on the Ontario Employment Standards website.

Pregnancy and Parental Leave

Pregnancy and parental leave are provided to permit employees to have authorized time off that coincides with the birth or adoption of a child. The leaves have been designed to allow employees to recover from childbirth, bond with and care for their newborn or adopted children, without fear of a negative impact on their employment status or any opportunities with the church. Employees that have become a new parent in the following regards shall be, as per the ESA, eligible for either pregnancy, or parental leave.

A new parent or pregnant employee is entitled to pregnancy/parental leave whether they are a full-time, part-time, permanent or contract employee provided that they:

- Work for an employer that is covered by the ESA
- Were hired at least thirteen (13) weeks before the date the baby is expected to be born (the "due date"); or
- Were hired at least thirteen (13) weeks before commencing the parental leave

Requests for Pregnancy/Parental Leave

To ensure that the church can make the necessary arrangements to accommodate an employee taking pregnancy or parental leave, your church's policy could require employees to provide at least two (2) weeks' notice before embarking on pregnancy or parental leave.

Employees who leave the church on pregnancy or parental leave of absence will, according to the ESA, be offered the same or a comparable position at the same salary level, upon their return to work at the end of the regulated term of leave. The employee will continue to accrue paid vacation while on pregnancy or parental leave.

If the employee is enrolled in benefits, they may continue to participate, on the condition that they continue to contribute their share of the premium costs, if this is applicable. If the employee is enrolled in the pension plan, they may continue to make employee contributions. If the employee makes their contributions, then the church would be required to continue to make employer contributions. While on leave the employee must continue to pay employee-paid long-term disability and life insurance plan premiums.

Employees are commonly expected to give four (4) weeks' notice regarding their expected date of return to work or their Offer of Employment if they choose not to return to work. Further details concerning pregnancy and parental leaves can be found in the Employment Standards Act.

In the event that an employee requires use of sick leave benefits at any time prior to the commencement of a pregnancy/parental leave period, the churches Sick Leave Policy would apply. After the pregnancy/parental leaves have concluded, employees are allowed to use up any unpaid vacation time, and/or sick days. In the event that a church employee requires an extension of leave following a pregnancy leave, the employee may use their family medical leave up to a maximum of eight (8) weeks, where medically substantiated, as laid out by the ESA.

Employees that elect to extend their leave through the use of accrued vacation time would be required to comply with your Vacation Policy, and provide four (4) weeks' notice, prior to the exhaustion of the leave. Church employees that elect to extend their leave through the use of family medical leave could be requested to provide church with as much advance notice as possible prior to the exhaustion of pregnancy leave.

Other Notes about Compensation

Compensation is optimally reviewed annually when budgets are developed for the coming fiscal period. The Board would be responsible for this task as well as the church treasurer. Anyone receiving compensation, or related to a person receiving compensation, should avoid a potential conflict of interest and remove themselves from these discussions and resulting decisions. The compensation is designed to provide a fair and adequate compensation package. CBOQ believes that both church staff and the Board will benefit from a deliberative process that brings everyone to agreement on fair compensation.

Discerning Questions:

- List some non-monetary benefits that you would wish your employer offered you?
- Ask yourself, would I be happy with this compensation package, given the hours and energy that is required to fill these obligations?
- What does your compensation package say about your church body? Are you happy or unhappy with this?
- How does this answer impact the Board's beliefs and practices in regards to compensation package development?
- Are their additional, non-legislated, benefits you can provide your staff to show your support?

The Goal of a Compensation Package

You may find it helpful to begin by considering the goals of a compensation package. A church ought to provide its staff adequate income so they can fulfill their roles without undue concern about current and future financial needs. Freedom from excessive financial anxiety allows the pastor to focus on what is important: people. It also helps your church attract and retain qualified staff members. Although ministry staff make many sacrifices for the sake of ministry, and are not in ministry solely for economic gain, there is a need for them to be fairly compensated. As the above sections note, compensation goes beyond financial remuneration.

Conduct

The conduct of employees is important in any setting. This is even more so for Christians as ambassadors of Christ. Below are the basics of conduct-based policies to guide you as you develop your own policy.

Confidentiality

Confidentiality is discussed at length in Section 1 in relation to the Personnel Team's responsibilities; however, confidentiality must be addressed in regards to church staff and volunteers.

Employees of your church are in a position of trust and must respect the confidential and private nature of information. Therefore, it should be required as a condition of employment that no member of staff disclose any confidential and/or private information to any non-employee, non-Board member of the church, or any other third party without the proper authorizations, unless required to do so by law. This obligation applies to every employee of the church, applies both during and after the employment relationship.

Discerning Questions:

- What is confidential?
- Who's confidences will this policy address?
- How will this policy inform the procedures related to the storage of documents, processing of donations, Board minutes?
- How does confidentiality inform the intentionality of your record keeping and administrative systems?

Personal information refers to any cheque, personnel file and data base, payroll data, and financial records used in the course of business. Confidential information includes, but is not limited to, any data that discloses personal or financial information of any program, employee, volunteer, church member, donor or potential donor.

As part of normal business practice, any personal documentation and records received, filed or maintained by the church should be treated as confidential information and stored securely. While processing confidential information, employees are expected to make every effort to safeguard that information, ensuring it is never left unattended or open to view by a third party, and is always locked away when not in use.

A common practice is that no confidential information in any format, including but not limited to personal and/or financial data of any kind, is to be removed from the church building without demonstrated consent or written permission from the owner.

Conflict Resolution

Unfortunately, conflict can arise in even the most Christ-centered of work environments. Having a specific policy to address these issues fairly and quickly is highly advantageous to restoring positive working relations.

Obviously, the best solution is to prevent conflict, and this is a central purpose of a policy manual. However, once a problem arises, it is necessary to respond to the issue and work quickly and thoughtfully toward a solution.

> "If your brother or sister sins, go and point out their fault, just between the two of you. If they listen to you, you have won them over. But if they will not listen, take one or two others along, so that 'every matter may be established by the testimony of two or three witnesses.' If they still refuse to listen, tell it to the church; and if they refuse to listen even to the church, treat them as you would a pagan or a tax collector.
>
> Matthew 18:15-17 (NIV)

This policy should be designed to provide employees with an outlet to raise concerns regarding any conflict in the workplace (including conflict with members of your church) or dissatisfaction with respect to issues related to their employment in an open and fair manner with provisions made to ensure their prompt and reasonable resolution. Under no circumstance should any employee fear discrimination or reprisal in the workplace as a result of the filing of a complaint.

Discerning Questions:

- How does your church currently resolve conflict? Between staff? Between congregants? Between staff and congregants? Do you address conflict head on? Or do you mitigate it and avoid?
- Does this system work?
- What doesn't work within this system?
- In an excellent process who would be able to access resolution?
- What does a 'resolved conflict' look like for your church?

A level-based policy allows for conflicts to be addressed early and for various points of engagement for more serious conflicts. An example is as follows:

Step One: Whenever possible, employees should seek to resolve interpersonal problems or concerns with one another directly. The nature of the grievance should be stated clearly and understood by both parties.

Step Two: Where step one fails, or is inappropriate, one or both parties should seek the counsel of the Personnel Team without delay. The Personnel Team will meet with both parties concerned to try to resolve the grievance and will note the dates, circumstances, and any agreements, in a memorandum. The parties involved in the mediation will retain copies of the memorandum.

Step Three: Should the initial steps be inadequate, the person(s) with a grievance should, without undue delay, present the case to the church board. Each party in the grievance procedure may request the presence of an observer. The board determines what course of action is appropriate and takes responsibility for seeing that the recommended action is implemented.

Health and Safety

It is highly recommended that your church has a Health and Safety policy and program in place to address the health and safety needs of your church staff and members. The purpose is to identify, report and recommend corrective action on any hazards or potential hazards which may cause harm to staff or property and in so doing, promote a healthy and safe workplace for all staff. Health and safety issues include office/church closure due to weather or other events that may cause threats to employee and congregation security and also child protection policy and workplace anti-violence and harassment policy.

The Occupational Health and Safety Awareness and Training regulation requires health and safety awareness training for every worker and supervisor under the Occupational Health and Safety Act (OHSA). Please note that as an employer you must provide staff with health and safety awareness training and post the Safety at Work poster provided by the Ministry of Labour.

A sample policy could include the following:

> *[Church name] is vitally interested in the health and safety of its employees. Protection of employees from injury or occupational disease is a continuing objective. The church will make every effort to provide a safe, healthy work environment. All employees must be dedicated to the continuing objective of reducing risk of injury. The church is ultimately responsible for employee health and safety and will take every reasonable precaution possible for the protection of our employees.*

In pursuit of your commitment to promoting a safe and healthy workplace for all employees, contractors, customers and visitors, the church should develop, implement and enforce such policies and procedures that promote and provide a healthier, safer work environment. The church should encourage open communication on health and safety issues. It is essential to provide an injury-free and productive work environment.

Take time to review all applicable workplace health and safety legislation as your church will be required to act in compliance with these standards. Review the OHSA website for further details and seek council on any issues of which you are unsure.

Discerning Questions:

- What threats could you reasonably expect in your community or geographical location?
- Could one reasonably plan to mitigate the impact of each of these potential situations?
- Would you ever cancel a Sunday service? What would be the reason for this?
- What are the threats that could impact the children who attend your programs? What measures are you currently taking to protect these children?
- What policies would best meet the needs of your church's families? How could these policies allow all members to feel welcome and safe?
- Conflict is inevitable in all communities. What policies could be adopted to ensure conflict doesn't become toxic? How could these policies allow all members to feel welcome and safe?

Workplace Anti-Violence and Harassment Policy

CBOQ and its member churches respect the dignity, uniqueness, and intrinsic worth of every person. As per the ESA, it is the right of all who work or volunteer with the church to work in an environment free from violence and harassment. CBOQ does not tolerate violence, harassment, or sexual harassment in the workplace perpetrated by or against employees, volunteers, or third parties and nor should its members. All instances of violence, harassment and sexual harassment in the workplace should be addressed.

The success of this policy will be achieved when everyone in the workplace is dedicated to preventing workplace violence and harassment. This commonly entails an expectation that all employees, board members, committee members, and other volunteers uphold this policy, and will be held accountable by the church. In the event of violence or harassment perpetrated by an employee, the church would discipline the employee appropriately.

Individuals may find it difficult to come forward with a complaint under this policy because of concerns of confidentiality. A solution would be that all complaints concerning workplace violence and harassment, as well as the names of parties involved, be treated as confidential. The church's obligation to conduct an investigation into the complaint may require limited disclosure. In addition, no record of the complaint would be maintained in the personnel file of the complainant. If there is a finding of improper conduct that results in disciplinary action, it will be reflected only on the file of the person who engaged in such conduct, in the same way as any other disciplinary action.

The purpose of this policy is to establish procedures to minimize and prevent violence, harassment, and sexual harassment in the workplace; to foster the safety and security of employees, volunteers, and visitors to our worksites, and to ensure that employees reporting alleged incidents will know the matter will be treated confidentially and may be reported without fear of retaliation or reprisal.

Child and Youth Protection Policy

The development of a Child and Youth Protection policy is beyond the scope of this workbook, however, it is a vital church policy and mandated by many insurance companies as well as being best practices for the protection of children as well as your church body as a whole. CBOQ can provide guidance in the creation of this policy for your church. A sample policy is on the CBOQ website under Church Operations.

Operations

The operations of the church as an employer requires following various protocols to ensure the confidentiality of personal information and the appropriate storage of legal documents. Operations also includes policies regarding expenses and other day to day activities.

Mileage Reimbursement

There are no income tax implications when this is reimbursed for actual kilometres travelled. A detailed log should be maintained by the pastor. The current CBOQ staff rate is 50¢/km. The Government of Canada reimbursement rate is 53.5¢/km in Ontario and 49¢/km in Quebec.

Expense Reimbursement

Many churches are recognizing the increased cost to a pastor for entertaining guests of the church, (e.g. in home or restaurants) and we suggest the church attempt to offset these costs for the pastor and other staff as appropriate. This cannot be paid as an allowance and must be reimbursed on the basis of actual expense. Clear tracking of reimbursement for this and all expenses is required with submitted receipts and confirmation of payout.

Record Retention and Storage

General files should be kept in a place appropriate for the congregation to access, and might contain the following public documents:

- Handbooks and resources
- The Mission Statement of the congregation
- Congregation profiles from work done by a search

committee or other congregational surveys, etc., including position descriptions

- Church constitution and by-laws

Personnel files—a separate, confidential file for each staff person—should be formed and kept in a secure place accessible only to the Personnel Team and the Board. These files contain such documents as position descriptions and Offers of Employment, call and appointment forms (for ministry personnel), and police record check results. The files also contain notations regarding:

- Remuneration
- Lists of continuing education
- Copies of performance plants
- Reports and recommendations brought to the Board

A note regarding conflict resolution and conduct issues: Records of rumours or innuendo should not be kept in the file of any employee. Only properly presented concerns or conflicts should be documented. This file will contain a paper trail of that process. This includes the concern as presented, the goals set to deal with the concern, and whether or not those goals were met. Staff should have access to the entire contents of their own personnel file on request to the Personnel Team.

Accessibility and Employment

The Accessibility for Ontarians with Disabilities Act, 2005 (AODA) are laws pertaining to accessibility standards that government, businesses, non-profit (i.e. churches) and public-sector organizations must follow to become more accessible to all people despite their disabilities. More information about this act can be found at ontario.ca. We encourage you to become familiar with this Act and determine how it impacts your church's policies and procedures.

Now You're Ready to Start

It is a privilege and a challenge to be given responsibility to lead in the area of personnel matters. Building good relationships in your congregation is exciting and rewarding work and we hope you will enjoy the process! This workbook of information is designed to be a helpful resource to you. Further assistance is always available through the CBOQ office.

Now may the God of peace, who through the blood of the eternal covenant brought back from the dead our Lord Jesus, that great Shepherd of the sheep, equip you with everything good for doing his will, and may he work in us what is pleasing to him, through Jesus Christ, to whom be glory for ever and ever. Amen.

Hebrews 13:20-21

SECTION 3: POLICY DEVELOPMENT

This final section provides a suggested format to use in the development of your policies and procedures, which may be combined into an HR manual.

The objectives of an HR manual are:

- To ensure a uniform understanding and application of Human Resources policies, procedures and practices
- To identify authority and responsibility for Human Resources policies, procedures and practices
- To standardize the handling of recurring personnel matters
- To provide a standard point of reference for use in auditing and determining the need for improving the existing Human Resource policies, practices and procedures

All employees should review and abide by the terms contained in the manual. While every provision may be made to make a manual comprehensive, it cannot address every possible application or exception. As such, the church may exercise discretion in the interpretation and enforcement of its HR manual and to revise or add to it from time to time. Employees should receive periodic updates and familiarize themselves with changes. Employees who fail to abide by any of the policies in your manual could be subject to discipline up to and including termination.

Scope

Policies and procedures in your manual will have a church-wide application to provide a basis for consistent and appropriate decision-making and provide guidance for staff on many issues. This policy manual will help staff accomplish the mission, maintain accountability and clarify how your church fulfills your mission. The policies and procedures in your manual would apply to all employees of the church, including volunteers, contract employees, interns and students, unless otherwise indicated.

All employees have the responsibility to familiarize themselves with the content of the policies and procedures of their employer and to conduct themselves accordingly. The Personnel Team has the responsibility to communicate with staff about the application of policies and procedures, to ensure compliance and to take corrective action when necessary. The Board holds ultimate responsibility to ensure all policies meet legislative requirements.

When developing your manual, a general rule is that all policies are:

- Presented in a common format
- Formally approved by the Board
- Distributed to relevant parties in a timely manner
- Located centrally and accessible to all parties
- Kept current at all times

Policy Design and Format

The following page contains a table that can be utilized for each of your policies.

It is helpful to ensure that the language you use is simple, specific and accurate. A concise and brief policy is the most effective. The Purpose or Intent section provides an opportunity to detail the rationale for a specific policy and describe the benefits of adopting it. This helps ensure consistency over all policies. Procedures provide practical guidance for implementation, including provisions for evaluation of the policy’s effectiveness and its periodic review.

Name of Policy: Conflict Resolution Policy

Date Created:		**Last Reviewed:**	

Background:

This section is to give context to the policy. Why was it drafted – new law introduced, change in standards, etc.

e.g.: *We have instituted this policy to provide employees with an outlet to raise concerns regarding any conflict in the workplace (including conflict with members of our constituency) or dissatisfaction with respect to issues related to their employment in an open and fair manner with provisions made to ensure their prompt and reasonable resolution.*

Purpose or Intent:

What this policy is design to achieve or its objectives. This section should be short and to the point.

e.g. *CBOQ is committed to providing a workplace free of conflict, where employees are treated with fairness, dignity and respect. In our life together in CBOQ, we choose to love one another in Christ. This means respecting the dignity and boundaries of one another and agreeing to be mutually accountable. From time to time, however, in spite of our hopes and intentions, relationships may become strained, damaged, or broken. Daily stresses and tensions, structural dysfunctions, personality differences, misunderstandings, misuse of power – all can bring about a need for a restoration of relationship, either through conflict resolution and/or through reparation and redress for injustice. (cf. Matt. 18:15-17)*

Scope:

To whom this policy applies. (This may not be applicable within a smaller staff context.)

e.g.: *All CBOQ staff and volunteers*

Definitions:

This section is only needed if the terminology requires additional clarification – i.e. Part-time vs. full time employment

Policy Statements:

The basic objectives and the guiding principles or rules

e.g.: *Under no circumstance should any employee fear discrimination or reprisal in the workplace as a result of the filing of a complaint.*

Any conflict in the workplace (including conflict with members of our constituency) or dissatisfaction with respect to issues related to their employment in an open and fair manner with provisions made to ensure their prompt and reasonable resolution.

Procedures:

The policy in action – detailed steps, methods and guidance on how to apply the policy

e.g.:

Step One

Whenever possible, employees should seek to resolve interpersonal problems or concerns with one another directly. The nature of the grievance should be stated clearly and understood by both parties. Each should keep a record of dates, circumstances and agreements, and should share this record with one another.

Step Two

Where Step One fails, or is inappropriate, one or both parties should, without delay… etc.

Appendices

Appendix A: Sample Offer of Employment

[Date]

[Name]

[Address]

Dear [NAME],

We are pleased to extend to you this offer of employment for role of [JOB TITLE] with [CHURCH NAME] commencing [DATE] with the following terms and conditions, which we trust will meet with your approval. A copy of your job description and job offer details are enclosed, which form part of this offer. This position reports to the [ROLE/TITLE].

Hours & Location The role is a [PART-TIME/FULL-TIME] position of [#] hours per week on average but may vary from week to week as needed. It is expected that you will manage this average work week.

Compensation and Benefits

Your annual salary will be $[AMOUNT GROSS], which is subject to review at the end of each fiscal year. The salary is payable on a semi-monthly pay period via direct deposit, subject to statutory deductions.

[Pension plan and Group benefits information included here]

[Continuing education, sabbatical, sick leave, Vacation entitlement and statutory holidays included here]

Security Clearance [if applicable]

This offer of employment is contingent on both a Criminal Record Check and a Vulnerable Sector Screening. Prior to commencement of employment, you must already be security cleared or have provided documentation proving you have requested a Criminal Record Search and a Vulnerable Sector Screening from your local police station. Any findings which appear on either the Criminal Record Check or the Vulnerable Sector Screening will be reviewed on a case by case basis by Senior Leadership. We will consider the specific conviction in light of the role in question. [CHURCH] reserves the right to revoke this offer of employment if it is deemed that a conviction will have a negative impact on our confidence in your ability to carry out the job responsibilities.

Expense Re-imbursement

[CHURCH] will reimburse all reasonable out-of-pocket expenses incurred in the carrying out of your duties and responsibilities. For travel, reimbursement will be for actual kilometers driven, as claimed by you the employee, at $[RATE] per kilometer. This rate may be adjusted by the employer as fuel costs would necessitate.

Employee Agreement [edit as applicable]

In carrying out your duties, you will comply with all [CHURCH] policies, including provisions of the Articles of Government or its future equivalent. Please review the attached policies and Articles of Government and return a signed copy of this Offer of Employment indicating your agreement to these policies.

Data Confidentiality

While employed by [CHURCH], you may acquire sensitive and/or proprietary information confidential to the church. You must maintain this confidentiality and exercise discretion in any disclosure of such confidential information. Please fill out the attached form to indicate your agreement to our Confidentiality Policy.

Accessibility

[CHURCH] is an equal opportunity employer and strives to provide work environments and opportunities that take into consideration an individual's accessibility needs due to disability. We have policies that identify our commitment and discuss accommodating employees with disabilities. If you would like to access these policies during your consideration of the offer presented, please let us know.

Probationary Period

A probationary period will apply for the first three months of employment to assess and confirm suitability for the position. A review will be held with the Personnel Team at the end of the probationary period. If your performance is deemed not to be satisfactory or a determination is made regarding fit or you are to be terminated within the probationary period, your entitlement to notice will be limited to the amount required by employment standards obligations.

Termination Clause

We have every confidence that your working relationship with [CHURCH] will be a success. We balance that confidence, however, with the reality that on occasion working relationships do not work. [Your employment may be terminated by [CHURCH] at any time by providing the minimum amount of notice and severance pay required by the Employment Standards Act, 2000 (as amended) in full satisfaction of all notice and severance obligations. If pay in lieu of notice is given, your benefits will be continued for all of the required notice period.

To accept the offer of employment on the terms and conditions set out in this letter, please sign the "Acceptance Clause" below and return the fully signed letter to [CHURCH] no later than 7 days after the date of this letter. On behalf of [CHURCH], we look forward to welcoming you to our ministry team.

Yours truly,

[NAME]

[ROLE/TITLE]

Acceptance Clause

I have read and understand this letter. I accept the employer's offer of employment contained herein based on the above terms and conditions set out in this letter which I understand will form an employment agreement between myself and [CHURCH]. I will also sign and return the [include names of statements and policies that your church requires new employees to sign].

______________________________ ______________________________

Signature Date

Appendix B: Guidelines for Developing Ministry Personnel Position Descriptions

Value of Position Descriptions

A written position description serves as:

- A guide to staff and congregations outlining and clarifying responsibilities and duties of the staff position(s)
- A guide for interviewing and selection of staff
- An aid in establishing staff and congregation priorities, goals and objectives
- An aid in any review process
- An aid in producing a smooth, balanced work flow
- An effective means of examining the responsibilities of the position as they may change over time
- A means to develop and support morale

Preparations for Developing Position Descriptions

- Within the congregation, the Personnel Team, the board/council (or its equivalent), and staff all have roles to play in developing position descriptions.
- The Personnel Team on behalf of the board/council (or its equivalent) will give leadership to the process. Persons with relevant skills may be consulted to assist in its completion.
- Approval of the position description should rest with the senior board/council (or its equivalent).

Collecting Position Information

The Personnel Team will need to collect the following information:

- Responsibilities of the position
- What the person does
- How the person does it
- Why the person does it
- Knowledge and skills involved
- Resources and equipment used
- Training and/or experience required
- Accountability
- How the position relates to other staff positions

1. The information can be secured from staff by a position questionnaire and personal interview: (1) request ministry personnel to complete questionnaire; (2) where appropriate, interview personnel individually concerning their duties and responsibilities. It may be helpful to have the person keep track of activities over a specified period of time, (e.g., one or two months).

(A) Questionnaire

- A copy of the position questionnaire should be given to staff with a full explanation of the various items on the form. People should be given at least two (2) weeks to complete the form. If there is more than one person serving as in a role, each person should receive a copy of the questionnaire.
- Request each person to list her/his responsibilities.
- It is important that the completed position questionnaires be checked carefully with staff before the final position descriptions are written.

(B) Interview

- The Personnel Team may assign one or more of its members to interview staff individually. The person interviewing should be familiar with the skills required for effective work in the particular position (and need to remember that this is not a work review).
- The completed information on the questionnaire should then be reviewed with staff. This provides a check to determine if the descriptions of tasks are accurately stated and if any task has been omitted.
- Completed position questionnaires and personal interviews are then analyzed carefully.
- And sample questionnaire form is included in Appendix C.
- Information can also be obtained from committees and groups within the congregation. This may be done with a similar questionnaire or interview to that used with staff.
- For new positions, consultation with other congregations with similar positions could be helpful.

Writing Position Descriptions

The following steps are suggested for writing position descriptions:

- Summarize the responsibilities of each position. Data appearing on the position questionnaire needs to be organized in a consistent format. For regular tasks, reference to the frequency of performance of the task could be included (e.g. daily, weekly, monthly, etc.).
- Summarize skills and other requirements necessary for each position. Establish minimum standards.
- Use language that is direct and specific enough to be helpful for evaluation purposes but not so specific that it does not allow for flexibility. Phrases such as “as appropriate”, “as required”, or “required” give some indication of whether an aspect of the position is an expected or a flexible part of the position. Avoid generalized terms and complicated sentence structures.
- Use the present tense throughout the position description.
- Include general areas of responsibility or principle functions (headings could include: pastoral care, Christian education, worship, spiritual and personal development, outreach, administration, committee responsibilities [on this issue and throughout the wider church], community and inter-church activities).

Under each heading there should be indication of those things for which the individual has sole responsibility as well as those things which require consultation with committees or other individuals (e.g. plan intergenerational mission study events in consultation with the Christian Education and Outreach Committees, prepare order for Sunday worship in consultation with the Worship Committee).

- If congregation or congregational policies exist that affect how responsibilities are to be carried out, these should be noted (e.g. conduct weddings in accordance with policies set by the congregation).
- Position descriptions could include some estimates of the percentage of time to be spent in each area; this would help in priority setting but should not be constraining. Such time estimates are particularly helpful in part-time positions.
- Upon approval all position descriptions should be signed and dated by a designate of the Board or by the Personnel Team and the staff involved.
- Terms of call or appointment would not be included in positions descriptions. Terms would include salary, housing allowances, vacation, various leaves, etc.
- Position description should include the date of review of the position description.

Maintaining Position Descriptions

The Personnel Team is responsible for developing position descriptions and maintaining, reviewing, and revising position descriptions. All position descriptions should be reviewed at least annually and always at the start of a search process. When changes are approved, the descriptions need to be rewritten.

This will be done by the Personnel Team in consultation with the staff member in the position. Approval of revised position descriptions by the Board should then be obtained.

The position description, along with the supporting position questionnaire data, should be kept with individual staff and personnel records.

Appendix C: Sample Position Development Questionnaire

The questionnaire below can be used as a tool to help your Personnel Team develop a job description once a need has been identified by the Board.

Position title:

Prepared by: Date:

1. Principle areas of responsibility (Include the percentage of time each area requires.)
   a.
   b.
   c.
   d.
2. Regular duties (List the major duties of the position, and how frequently performed.)
3. Occasional duties (List the duties sometimes required by the position, and how frequently performed.)
4. Skills and experience (Note specific skills, abilities, education requirements, etc.)

5. What routine consultation with other staff or committee is required? (List the positions and describe the nature and frequency of the consultation.)

6. Normally, what decisions are made by you without additional consultation?

Nature of decision	Frequency of occurrence

7. In your responsibilities, what contacts are made with people outside the congregation?

8. Include Association and CBOQ expectations and involvement as well as community involvement; those activities that are standard requirements as well as those that are negotiated.

9. Give any additional comment, which will aid in describing your work completely.

Appendix D: Performance Management – Planning

The following is a sample Performance Management Planning directive. It is an excellent starting point for developing your own meaningful policy and procedures.

The Personnel Team should collaborate with staff to review the requirements of the staff member's job (including annual review of the job description) and develop performance expectations in the form of documented performance goals. Areas of responsibility will be utilized to aid in creating individual performance plans with each staff member. A Performance Plan Template has been developed to aid in developing performance goals. Goals should align with your church's organizational goals and objectives.

Each Performance Plan should include the following information:

- A set of specific goals for achieving the requirements of the job
- An action plan or outline of how these goals will be met; this may include plans for training and development
- A time-frame for when goals should be met by the employee
- Additional comments and areas of concern or anticipated restraints

Performance plans should be created within designated time frames based upon prior performance, length of time with the organization, and recent promotions or significant changes in duties and responsibilities. The performance plan will be utilized to not only establish performance goals but will also act as a tool for which actual performance can be measured against.

New, probationary employees should have a performance plan created for them within their first week of employment. A formal review should be held at the end of the probationary period or earlier if the employee is exhibiting performance problems. Performance plans should be updated at least every six months for each employee who is no longer considered probationary and is not exhibiting any performance problems.

Employees who have been promoted, have changed departments, or have had their duties or responsibilities significantly changed should have a performance plan created within the first week of their new position. A formal feedback meeting should be scheduled within the first three months so that performance and progression towards established goals and objectives may be assessed within the new role.

Once created, both the employee and supervisor should sign and date the Performance Plan with a copy remaining with the employee, one with the supervisor and another to remain on the employee's file. The Performance Plan is a living document and is to be re-visited and revised as part of your regular one-to-ones to assess individual achievement and/or progression towards the established goals.

Appendix E: Performance Management – Coaching and Feedback

The following is some general advice about providing feedback and some tools to help guide this important process.

A big mistake that many supervisors make when giving feedback is doing all the talking. It's not an opportunity to vent your frustrations. If you can keep in mind that it's the employee's meeting, it will be a much more productive and effective session. You should even have the employee prepare an agenda of what they'd like to discuss during the meeting. This has two benefits:

1. It psychologically prepares them
2. It sets a clear agenda

Then, you can use some time to ask the employee questions of your own. Here's a recommended outline for a one-hour one-to-one meeting:

- 10-minutes: Informal catch up
- 20-minutes: Employee's agenda items
- 20-minutes: Supervisor's notes and questions
- 10-minutes: Action plan and next steps

10-MINUTE INFORMAL CATCH-UP

This is a great way to start a feedback session because it lightens the mood. It's likely that an employee is nervous stepping into your office, not knowing what to expect. Starting with an informal "how was your weekend?" or "when we last spoke, you mentioned you were starting guitar lessons, how's that going?" not only lightens the mood but shows the employee that you genuinely care about them as a person, and not as a "resource."

20-MINUTE EMPLOYEE'S AGENDA ITEMS

Remember, this is the employee's meeting, not yours. It's important that you keep this in mind and let employees use this opportunity to get anything that might be bothering them off their chest. Even the fact that it's called a one-to-one is important. If you called it a "check-in" then employees would show up expecting to provide a quick status update on their work. That's not what this is. It's a one-to-one, a private discussion between two people where employees should feel free to be as open as possible.

20-MINUTE SUPERVISOR'S NOTES

Once the employee has gotten everything off their chest, and you've addressed their concerns properly, it's your turn to ask the employee questions and give them feedback about their work.

Here are a few good questions you can ask:

- Are there any projects you'd really like to work on?
- Is any part of your current project unclear or confusing?
- Do you feel like you're making progress on your goals? Why or why not?
- How could we change our team meetings to be more effective?
- Which company values do you like the most? Which the least? Why?
- Do you feel you're getting enough feedback?

10-MINUTE ACTION PLAN AND NEXT STEPS

This is probably the most important part of the one-to-one because it shows commitment and accountability. The one-to-one is useless without this step. Two questions you should be asking at the end of the meeting:

- What can I hold you accountable for the next time we talk?
- What can I be accountable to you for the next time we talk?

Make sure to write the action plan down!

Here are a few important rules to keep in mind with one-to-ones:

- Schedule a recurring event to have that type of structure is important both to the feedback process and to show the employee that you take their concerns seriously
- Never miss one, they are so valuable and important that you should only miss one if you have a very good excuse
- Write everything down take notes as the employee is talking, as the employee answers your questions, and as you discuss an action plan
- Send a follow-up email soon after a good practice is to send a recap email to the employee (another reason taking notes is so important!)

THE DOS AND DON'TS OF GIVING FEEDBACK

DO

- Acknowledge giving feedback is painful but essential
- Understand that receiving feedback is difficult too
- Recognize no one is perfect
- View both positive and corrective feedback as a gift
- Understand threat responses to feedback and how you can minimize threat
- Build trust and create a safe environment for feedback
- Prepare for feedback: Write key talking points and prepare questions to ask (use our effective feedback tool)
- Give feedback with the intent to help the receiver grow and improve
- Be immediate and timely
- Remain calm and manage your emotions
- Practice active listening with good eye contact and open body language

DON'T

- Give only positive or only negative feedback
- Turn the feedback receiver into a villain
- Allow ego, fear, or personality prevent you from giving feedback
- Try to prove who is right and who is wrong
- Overreact or become upset
- Become argumentative
- Talk too much
- Be insincere in giving positive feedback
- Only focus on mistakes
- Give feedback to just provide information
- Assume what works for you will work for others
- Inundate the receiver with your point of view and stories
- Focus on the past
- Stockpile negative feedback
- Vent
- Email negative or corrective feedback

- Ask questions: Help the receiver self-evaluate to make connections about performance and identify new habits to build
- Be specific: Define specific behaviors to improve
- Make your expectations for performance clear
- Stick to facts
- Be tough but not mean
- Describe outcomes: What was the result of the behavior, positive and negative?
- Focus on the future: What does this look like moving forward?
- Help set goals for improvement
- Help make a roadmap: A path of small, concrete actions
- Provide or find information that can help the receiver improve
- Ask what you can do to help
- Find balance among the types of feedback you give: appreciation, coaching, and evaluation
- Practice
- Encourage or schedule regular feedback conversations
- Encourage dialogue about progress
- Be willing to receive feedback
- End on a positive note

- Have expectations the receiver cannot meet
- Discourage employees to come to you with problems
- Put employees in an environment where they can't get help from others

Taken from "A Practical Guide to Giving and Receiving Feedback" by Quantum Workplace

Appendix F: Performance Management – Sample Plan

This is a sample Performance Management Plan that is utilized by CBOQ. It is included for your use, as is or it can be modified to meet your church's unique needs.

PERFORMANCE PLAN

GOAL:

Outcome: What is the desired outcome of your goal?

Key results: What measurable targets will tell you if you've achieved this goal?

Timeline (due date; checkpoints; milestones):

Requirements for achievement (budget, resources, training, development):

Potential obstacles to achievement:

Actual Results/Progression:

GOAL STATEMENT:

will

(who)

(action word)

by

(object of goal)

(time)

for the purpose of

.

(explain relevance)

Employee Name:

Supervisor Name:

Signature:

Signature:

Review/reflection comments/observations once goal achieved:

Supervisor:

Employee:

Appendix G: Performance Management – Feedback Tools

These are helpful tools for providing effective feedback. The first tool is to assist in the development of an opening statement when giving feedback. An opening statement gives the employee a detailed synopsis of their performance and launches a productive and positive discussion. The second tool is a template for a performance and goal check-in. It provides powerful questions that will help guide the process.

DEVELOPING AN OPENING STATEMENT

ISSUE

1. Provide employee with concrete examples

2. How does it affect you, the supervisor?

3. What is going well or has gone well?

4. What are your future expectations?

OPENING STATEMENT

GOALS AND JOB PERFORMANCE PROGRESS CHECK IN

Employee Name:

Position: *i.e.* Church Administrator

Performance Period: From: To:

Today's Date:

GOALS

What goals are you currently working on?

e.g. Select and implement an online church calendar and scheduler. All staff to be trained on system by June 1st. To be launched June 20th.

How have things gone since we last spoke (highlights, what didn't go so well)?

e.g. Have identified three possible programs

Took much longer than anticipated due to complexity of our church's needs

In addition, Project X took up more time than had been scheduled, limiting the time I was able to dedicate to searching

What goals are completed, need to be revised or possibly thrown out?

e.g. The general timeline will need to be pushed back by two months as the program has yet to be chosen.

Any new goals to add? (use Performance Plan template)

e.g.: To develop a simple user sheet so that staff can have on hand if they are having trouble with the new scheduler. Due by launch date (new date August 20th).

JOB PERFORMANCE

How are your day-to-day tasks or projects going?

e.g. Project X is consuming a large portion of my time, making it challenging to meet other timelines.

The website development is coming along nicely and I am really enjoying the process.

How do the projects or tasks you are working on align with your goals?

e.g. My main goal was to develop my computer competency. After taking a basic website development course in November, I have been able to put these to use on the website update. This is of course in line with our church's commitment to increase our web presence and outreach.

Based on decisions and actions coming out of your last check in, what steps have you taken and what still needs to be focused on?

e.g. I have increased my general knowledge of website design but I will need to continue to develop my general knowledge in this area. I would like to take a future course on more specific design/programming so that I can better tailor our site to our needs.

OBSTACLES

What is keeping you from accomplishing your work or making progress with your goals (roadblocks or bottlenecks)?

e.g. Project X is taking up a great deal of my time. This project was given to me with the expectation that it would only take 15 hours a week. However, it is taking far more time that had been estimated.

In addition, I continue to struggle regularly to get a few staff to hand in their contributions for various publications.

What resources, tools, information and/or training do you need to best perform in your role?

e.g. I would like a clearer understanding of my priorities (for example, is Project X more important than the scheduler?). The website was established as high priority at the beginning of the year but then Project X was assigned the same priority.

Having an occasional helping hand from a skilled volunteer (with an administrative background) would be very helpful.

What do we need to do to get over these obstacles?

e.g.: Regarding Project X, I will need to temporarily put other projects on hold or push back deadlines (as with the scheduler). I would ask in future if I could be part of the discussion regarding timelines. The timelines the Board gave me was unrealistic. I don't believe they understood the complexity of this task.

Regarding staff abiding by timelines 1) if the Personnel Team could address the importance of meeting timelines for publications with all staff this would help. 2) I need to better understand my role in this area – can I push these staff?

OPPORTUNITIES

What are you proud of that people don't know about?

e.g.: The development of our website. I feel it truly reflects our church's mission and community and reduces potential newcomers hesitations to visiting.

What excites you the most about your day-to-day responsibilities?

e.g.: building community by communicating and connecting people!

What other projects or tasks would you like to work on?

e.g.: I would like to continue my website development to include a blog and weekly posting sermons. I think it would be a wonderful outreach and would allow me to continue developing these skills.

DECISIONS

What actions will each of us take before your next check in?

e.g.: Personnel Team to impress upon all staff the importance of meeting publication deadlines.

Personnel Team to address with the Board the need to more accurately estimate time investments and how this might be accomplished

Administrator will research future career development courses in programming.

What other big decisions did we make?

e.g.: That the Administrator will continue to develop the website to include the weekly uploading of the sermon and will research the feasibly of launching a blog. This will start in September.

Appendix H: Exit Interview

Below is a sample Exit Interview Questionnaire. This tool can capture helpful information that can inform your Personnel Team as they lead and review or develop your Human Resource tools.

Exit Interview Questionnaire

Employee's Name:	
Position Title:	
Start Date:	
End Date:	
Reason for Departure:	❑ Resignation ❑ Retirement ❑ End of Contract ❑ Other Reason *(specify)*
Please rate the following aspects of your employment experience with your church.	
Salary level and compensation practices generally	❑ Excellent ❑ Very Good ❑ Good ❑ Poor ❑ Very Poor *Comments*:
Health benefits	❑ Excellent ❑ Very Good ❑ Good ❑ Poor ❑ Very Poor *Comments*:
Pension plan	❑ Excellent ❑ Very Good ❑ Good ❑ Poor ❑ Very Poor *Comments*:
Opportunities for growth and advancement	❑ Excellent ❑ Very Good ❑ Good ❑ Poor ❑ Very Poor *Comments*:
Direction received from your Supervisor	❑ Excellent ❑ Very Good ❑ Good ❑ Poor ❑ Very Poor *Comments*:
Support received from your Supervisor	❑ Excellent ❑ Very Good ❑ Good ❑ Poor ❑ Very Poor *Comments*:
Quality of training and development programs	❑ Excellent ❑ Very Good ❑ Good ❑ Poor ❑ Very Poor *Comments*:
Relationships with co-workers	❑ Excellent ❑ Very Good ❑ Good ❑ Poor ❑ Very Poor *Comments*:
Physical working conditions	❑ Excellent ❑ Very Good ❑ Good ❑ Poor ❑ Very Poor *Comments*:

Job satisfaction	❑ Very High *Comments*:	❑ High	❑ Average	❑ Low	❑ Very Low
Overall satisfaction with your church as an employer	❑ Very High *Comments*:	❑ High	❑ Average	❑ Low	❑ Very Low

Please indicate what you enjoyed the <u>most</u> about your employment with this church.

Comments:

Please indicate what you enjoyed the <u>least</u> about your employment with this church?

Comments:

Are there any particular changes or improvements you would suggest be considered in this church?

Comments:

May we provide a copy of this Exit Interview Questionnaire to the board?

❑ YES ❑ NO

Do you have any further comments or suggestions of a general nature?

Comments:

Appendix I: Recommended Minimum Salary Guideline

This annual document is made available to CBOQ's member churches each year to assist churches in providing a fair and equitable wage for their staff. The sample document is from 2018.

How Do We Calculate Minimum Salary?

It is recommended that the minimum salary for pastors at different accreditation levels (which take educational credentials into account) should be based on:

a) Years of service in formal ministry (full-time equivalent)
b) Multiple staff supervision
c) Location– urban increment (churches in GTA, Ottawa and Montreal are considered as urban locations). The suggested amount is $7,000.

For merit increases, an annual evaluation process should be set up, which will allow clear articulation of expectations and goals for both the congregation and the Pastor. For suggestions, please contact the CBOQ office.

This calculation represents employment earnings. It is the Pastor's responsibility to identify how much is to be allocated for housing (clergy Residence Deduction based on the CRA rules).

If the church provides a parsonage, then the gross is reduced by the fair rental value of the parsonage.

*Having calculated the recommended salary, consideration may be given to other increments warranted by the congregation's and the pastor's situation, such as a merit increase, adding this to the total.

Step 1 | **Accreditation Level of the Pastor: Level ________**

Step 2 | **Years of service in formal ministry (Full Time Equiv.) :_______ years**

Step 3 | **Minimum salary chart**

Years of service :	Level One Accreditation:	Level Two Accreditation:	Level Three Accreditation:
0 to 1st year	39,559	44,488	46,309
2nd year	41,360	46,400	48,424
3rd year	43,142	48,283	50,630
4th year	44,953	50,084	52,766
5th year or beyond	46,734	51,916	54,618

Minimum starting salary: (from the above chart)	$

Step 4 | **Length of Service Increment**

Column A: Total years of formal ministry service (full-time equivalent , from step 2)	**Column B** Insert minimum salary from Step 3 on appropriate line	**Column C** Multiply by %	**Column D** Equals	**Column E: Length of Service Increment Total** Add Column B and D
6 through 9		5		
10 through 14		10		
15 through 19		15		
20 through 24		20		
25 or more		30		

With Length of service increment: (from Column E)	$

Step 5 **Multiple staff increment:** an increment should be added on the basis of number of full time equivalent staff members supervised by the minister. A suggested guideline is as follows:
1-3 staff members supervised : 3%
4 - 6 staff members supervised : 6%
7 or more staff members supervised : 9%
(Calculation: Step 4 total multiplied by .03, .06, .09, as appropriate)

Multiple staff increment:	$

Step 6

Urban location increment (see note "c" at left: $7,000 for churches in GTA, Ottawa or Montreal)	$

Step 7

Recommended adjusted minimum salary * **(steps 4+5+6) :**	$

Appendix J: List of Files

Maintenance of employee records. Employee records are maintained for several important reasons:

- To ensure that legal, regulatory, and procedural requirements have been met
- To provide a basis for making personnel decisions (e.g. benefits, salary, termination)
- To assist with human resources management
- To collect information for statistical human resources reports for the board of directors and/or the government.

For organizations in all provinces except Alberta, British Columbia, and Quebec, an employee's personal information that is collected to support the employer/employee relationship is not subject to the privacy legislation when the information is held by the organization within the organization's offices. However, once an organization enters into a commercial relationship such as hiring an agency to recruit for a position or sending employee information to any outside payroll service or benefits provider, the privacy legislation will apply.

Even if the information you collect about your employees is not subject to privacy law, employees have come to expect that their personal information will be kept private. Therefore, the best approach to an employee's personal information is to treat it as though it is subject to privacy legislation.

Personal Information Protection and Electronic Documents Act (PIPEDA) sets out 10 privacy principles for the collection, use, disclosure and retention of personal information. The provinces with privacy legislation have similar privacy principles. Your organization can ensure good practice in maintaining employee records by applying these privacy principles:

1. Accountability
2. Identifying purpose
3. Consent
4. Limiting collection
5. Limiting use, disclosure, and retention
6. Accuracy
7. Safeguards
8. Openness
9. Individual access
10. Challenging compliance

An employee has the right to review his or her own employee records. Your church should specify how employees access their employee records. Typically, churches do not allow employees to remove the file from the area in which it is kept. In order to maintain the integrity of the employee records, employees are not usually permitted to remove or add anything to the file. A process for ensuring the accuracy of employee information should be established. This process would include a method for employees to formally request an update to information contained in their personnel file.

- Employee's resume
- Interview notes and reference check documentation
- Offer of Employment
- Proof of accreditation
- Job description
- Employee information sheet which should include:
    - Home address and telephone number
    - Emergency contact
    - Hiring and termination dates
    - Birth date
    - Social Insurance Number
    - Pertinent Medical issues (i.e. allergies, medical alert etc.)
- Salary or wage history
- Performance related documentation including information such as appraisals, commendations, and disciplinary action
- Leave request forms and any applicable medical certificates
- Confidential correspondence with employee
- Tax forms
- Sign off on all life style policies, insurance forms etc. – renewed as required
- Waiver for pension and benefits declining coverage
- Police checks and subsequent affidavits confirming no new offences
- Termination information and/or letter of resignation
- Letters of recommendation

CANADIAN
BAPTISTS
of Ontario
and Quebec

5 International Blvd, Etobicoke, ON M9W 6H3
P. 416 622 8600 ◦ F. 416 622 2308 ◦ E. cboq@baptist.ca
baptist.ca