

National Association of Ecumenical & Interreligious Staff  
Professional Development and Standards Committee

**Standards for Personnel Practices**

**Introduction**

An important function of any professional association is to issue standards that have as their purpose improving the services given by members of the profession. These standards have been developed by the Professional Development and Standards Committee of the NATIONAL ASSOCIATION OF ECUMENICAL STAFF (NAES).

The Committee reviewed professional standards of selected national professional organizations and found the National Association of Social Workers' Standards for Social Work Personnel Practices very suitable for adaptation. This base was modified by comparison with several existing ecumenical and interfaith organizations' personnel policies.

The resulting draft was submitted to the membership of NAES at the July 1989 Annual Meeting. The resulting suggestions have been incorporated into this document, which was adopted at the 1990 NAES Annual Meeting.

These Standards are endorsed by NAES and recommended by the Association to practicing ecumenical workers, to their employing organizations, and to their supporting constituencies as being basic to good personnel administration.

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## 1. GENERAL PRINCIPLES

These standards are based on the principles that:

- 1) effective ecumenical service depends on qualified staff, and
- 2) staff members can give their best service when they work under conditions of employment that are conducive to the maintenance of high quality and quantity performance.

Since the fundamental concern of professionals working in ecumenical settings is ministry with and to the ecumenical religious community, these standards are issued with the understanding that they will always be applied within the context of the one ecumenical movement, called of God to be in mission in community.

For ecumenical workers to function at their best, every organization employing them should have policies pertaining to personnel administration developed by a cooperative process involving staff, board, and administration. These policies should be available to all members of the staff and governing boards. As standards of good practice, they apply equally to administrative personnel and, except when indicated, to professional and nonprofessional staff.

An organization's personnel policies should include a clear, practical plan for affirmative action to achieve a work force that is free of racial or sexual discrimination. They should also require the nondiscriminatory administration of personnel matters.

Staff should participate in the development of personnel policies and in the regular periodic review of them. The policies should include a provision for hearing staff members' grievances and other provisions substantially similar to those that follow.

These standards represent principles of sound personnel policies and practices. They are not intended to be a substitute for personnel policies formed by specific organizations. However, they have been formulated to serve as a guide in the development of personnel policies in local associations. When there is an opportunity to review personnel practices in specific organizations, these standards will serve as a basis for evaluation and recommendation.

The chief executive of an organization is responsible for the day-to-day administration of these standards, and all personnel are accountable to the chief executive. The chief executive is appointed by the governing body and is accountable to that body.

A copy of personnel policies shall be given to each employee at the time of her/his employment. The employee shall sign a form indicating receipt and explanation of these standards. Revisions shall be given to employees within a reasonable period of time after the revision is adopted.

Exceptions to these standards may be made with the written approval of the chief executive and/or as required by existing Federal and/or State law or regulations.

The policies described here are not conditions of employment, and the language is not intended to create a contract between the organization and its employees.

## 2. DEFINITIONS

### 1) Exempt and Non-Exempt Categories

In accordance with the Fair Labor Standards Act, there are exempt and non-exempt positions. Persons employed in non-exempt positions shall be paid overtime wages for hours worked in excess of forty hours per week (at time and a half rate). Those employed in exempt positions are not paid overtime wages for hours worked in excess of forty hours per week.

To be defined as exempt, the employee must:

- a) be an executive, manager, administrator, or supervisor of two or more persons; or
- b) have authority to hire/fire or to recommend it; or
- c) have discretionary decision-making power;
- d) be paid over \$155. per week, with no more than 20% of time being spent in non-exempt work; or \$250 per week with no more than 50% of time spent in non-exempt work.

### 2) Professional Staff (Exempt Staff)

Chief executive; managers, administrators, supervisory personnel; professionals such as chaplains, and others so defined upon employment. Professional Staff may be employed full time or part time, on a regular or temporary basis. Professional staff may be salaried or hourly.

### 3) Ordained Clergy

In accordance with Federal and State statutes, all ordained clergy are considered self-employed persons engaged in the exercise of their ministry, and are not subject to withholding for certain taxes, nor are they covered under state disability or unemployment insurance.

### 4) Support Staff (Non-Exempt)

Secretaries, typists, clerks, laborers, drivers, and others so defined upon employment. Support staff may be employed full or part time or on a temporary basis. Support staff may be salaried or hourly. Support staff are an indispensable part of the organization with rights and status equal to any other category of staff.

### 5) Contract/Purchase of Service Staff

Persons with whom the organization contracts for a specific period of time to provide specific professional services not under the day-to-day direction of the organization (e.g., accountant, temporary chaplains serving institutions). These persons are not regular employees and are entitled to only those benefits included in each individual contract.

### 6) Regular Employees Full Time

An employee who is regularly scheduled to work a minimum of forty hours per week. Such employees are entitled to benefits as outlined herein.

7) Regular Employees Part Time

An employee who is regularly scheduled to work a minimum of twenty hours per week. Such employees are entitled to benefits as outlined herein, on a prorated basis.

8) Temporary Employees of the Organization and Part Time Employees Working Less Than Twenty Hours

Temporary employees are hired for a defined, limited period. Such employees, and those working less than a twenty hour week, are entitled only to those benefits required by law, which shall be defined at the time of employment.

3. PROFESSIONAL ETHICS

It is recommended that the organization develop a code of ethics for ecumenical workers. It shall uphold the responsibility of the ecumenical worker to abide by the code of ethics as expressed in the specific principles for professional conduct that the code contains. The organization's policies or regulations shall be consistent with the principles of sound professional conduct represented by the code.

(For guidance, see the NAES document, GUIDELINES FOR ETHICAL BEHAVIOR, adopted in July 1993.)

4. AFFIRMATIVE ACTION

Every employer shall prepare and make public a plan for affirmative action to achieve a work force free of discrimination and prejudice.

Employers in the private and non-profit sectors are also covered by Title VII of the Equal Employment Opportunity Act of 1972 in prohibiting discrimination. Affirmative action to eliminate present and future discrimination is not required by this act, but a plan should be prepared by every employer. Comprehensive guidelines and suggestions for the preparation of an affirmative action plan are available from the U.S. Equal Employment Opportunity Commission.

The following elements represent the basic principles of an affirmative action program:

- 1) The organization should have a strong policy and commitment to implementing it.
- 2) Responsibility and authority for the program should be assigned to a top administrator of the organization.
- 3) The present work force should be analyzed to identify sections or occupations in which minorities, women or men, are underutilized.
- 4) Specific, measurable, and attainable hiring and promotion goals should be set, with target

dates for each area of underutilization.

- 5) In large organizations, each section manager should be responsible and accountable for helping to meet the goals.
- 6) Job descriptions, hiring criteria, and job classifications should be reviewed to assure that they reflect actual job needs.
- 7) The organization should actively search for minorities and women who qualify or who can become qualified.
- 8) All personnel and employment procedures should be reviewed and revised to assure that they do not have a discriminatory effect, and that they help attain goals.
- 9) Procedures or a system to monitor and measure progress regularly should be developed.

A statement of equal employment opportunity an organization could use in its manual is:

(This organization) promotes the principles of equal employment opportunity in all decisions involving recruiting, hiring, training, compensation, benefits, promotions, and transfers, and in the administration of all other personnel actions. All employment decisions will be made on the basis of each individual employee's skill, ability, merit, potential, experience and other factors which make an employee a valued member of this organization.

## 5. NON-DISCRIMINATION

In all personnel actions and relations, there shall be no discrimination based on personal characteristics that do not directly relate to the performance of individuals' duties. Such personal characteristics include race, physical handicap, gender, sexual orientation, color, age, residence, national origin, organizational membership, or political belief. Employers of ecumenical workers shall recognize the right of employees to engage in personal social action and political activity on their own time. The rare situations in which discrimination or action based on these factors may be appropriate shall be specifically identified, justified in writing, and made known to all interested parties.

## 6. SELECTION OF PERSONNEL

Personnel shall be selected on the basis of professional competence and ecumenical commitment, which is designed to assure appointment of persons best qualified to discharge the organization's function effectively. In recruiting personnel, the organization shall, at the appropriate time and place, make the following known to prospective employees:

- 1) Specific requirements of and salary range for the vacant position.
- 2) Qualifications of the candidates sought for the position.

- 3) The organization's commitment to affirmative action.
- 4) Personnel practices of the organization.
- 5) Any anticipated changes in the organization's structure and function having direct bearing on the position to be filled.

In the course of evaluating a candidate for a position, written references shall be obtained. Requests for references should state that the requesting organization will feel free to share references with the applicants. References provided with a request that they not be shared should be returned and not considered. Informal, verbal discussions of an applicant with a previous employer should not supplant open, honest reference giving, but may be used to verify data presented by the candidate.

Appointment to a position shall be in writing, with duties, compensation, conditions of employment, and the place of the position in the general function and program of the organization set forth. After an appointment is made, any major change in the assignment or conditions of employment shall be confirmed in a letter to the employee. Letters of appointment, as well as letters regarding changes in assignment or conditions of employment, should be acknowledged by the employee in writing.

## 7. PROBATION

Probationary periods serve a dual purpose: to permit the employer to evaluate the employee's performance and to provide an opportunity for the employee to assess whether the organization provides a suitable setting for his/her professional interests.

When a probationary period is required, it shall be for a specified period of time. A minimum of three months, and a maximum of six months is recommended for professional personnel. The end of such a period shall be marked by a mutual evaluation and by a clear decision by both the employer and the employee in the new position on the regular staff. Should either the employee or the employer decide to terminate employment at the end of the probationary period, this decision should not automatically be reflected adversely in the employee's references or record.

After satisfactory completion of the probationary period, all of the organization's personnel policies and benefits shall apply retroactively to the date of employment with the organization.

## 8. PERSONNEL MANUAL

Every organization shall have a personnel practices and procedures statement which shall be provided to employees on entering duty, and readily available thereafter. The development and revision of the practices shall be the responsibility of the policy-making body, with participation by the staff (e.g., through staff and board personnel committees, a staff advisory committee, union representation).

The organization executive shall have the responsibility of implementing the policies and assuring that there is effective communication between the various staff and administrative levels. A specific

procedure for preparing and amending the manual should be written.

The manual shall be reviewed at least biennially. Changes in the manual shall be set forth in writing, and copies of such changes provided to all employees. The manual shall include the following:

- 1) A clear statement of the organization's purpose and goals, including its commitment to affirmative action.
- 2) A description of the organization's functions, organizational structure, and administrative lines of authority and responsibility and how they are delegated or shared.
- 3) A clear definition of the ways in which new policies and/or practices or modifications thereof are established and implemented.

## 9. GRIEVANCES

Provision shall be made for a hearing if the employee believes he or she has been unjustly affected by a personnel action or policy of the organization. Such procedures shall be in writing and include the following:

- 1) Clearly defined procedures for due process, including a hearing, and the right to appeal. An opportunity for the employee to confer with supervisory and administrative superiors, as needed, shall be provided.
- 2) Provision for representation, when desired, by a staff member.
- 3) Provision for the protection of the employer's right to have a written statement describing the basis of the specific action giving rise to the grievance, and the employee's right and responsibility to present in writing the specific basis for his/her dissatisfaction.
- 4) Opportunity for consideration of the alleged grievance by at least an intra-organization committee or other group capable of providing judicious review. The appropriate committee or group should be specified in the organization's procedures.
- 5) Opportunity for the employee to present testimony before an impartial body considering the alleged grievance, directly or through witnesses, and to have a representative of his/her own choice.
- 6) A clear delineation of the person or persons having authority for making the final decision.

## 10. CLASSIFICATION PLANS

To achieve the purpose and carry out the functions of the program of an organization effectively and efficiently, there shall be a classification of all positions based on their relative complexity and responsibility that will clarify the duties of the positions, and serve as a basis for employment

interviews, equitable salary administration, and other personnel purposes.

The classification plan shall include a statement or table showing the grouping of each position with other positions of a similar level of complexity and responsibility, and a statement placing this grouping or classification of positions in proper relationship to other classifications of positions. It shall be in writing and be provided to staff. There shall be provisions for continuing periodic review of positions and their classification.

A job description shall be prepared for each position and should include the following:

- 1) A title that accurately reflects the functions of the position.
- 2) A listing or description of the duties and responsibilities of the position.
- 3) A statement of the minimum qualifications required to perform the duties of the position.
- 4) A clear statement of the person responsible for the supervision of each level.

## 11. SALARY POLICY

In furtherance of its purpose to promote the quality and effectiveness of staff members of the one ecumenical movement through ministry with and to the ecumenical religious community, NAES seeks to develop and support policies, procedures, and programs that will help recruit, train, and retain qualified and competent personnel to staff ecumenical organizations at all levels in the United States.

Of equal importance in creating an adequate supply of professionally qualified personnel is the retention of these people in paid positions of ecumenical leadership. Experienced and well-qualified personnel provide a basic core for the hiring organization. Their accumulated wisdom and experience are needed to add to knowledge and skill, and to raise standards of performance. These experienced workers are also essential for pre-service and in-service education and research. Well qualified persons must not be lost to more remunerative fields because adequate compensation for years of experience is not available in ecumenical employment.

For the practitioner who meets the normal expectations of increased competence and responsibility, an annual merit increase in salary is recommended.

## 12. PAY PLAN

There shall be a pay plan made up of a salary range for each class of position to assure that ecumenical workers receive equitable treatment in salaries, and to assure efficient administration of an organization. The pay plan shall:

- 1) Cover each group of positions in the classification plan.
- 2) Indicate the salary range for each class of positions and the amount and frequency of increments. It should also state the frequency of increments, and whether they are cost of living only or additional, based on merit.
- 3) Include appropriate salary steps within and among job levels to reflect requirements of or achievements in education, training, experience, and level of responsibility.
- 4) Provide for annual review and consultation with staff, separate from performance review.

The salary range assigned to each job classification shall be high enough to attract and retain competent professional personnel. It shall take into account the extent and nature of the responsibilities, qualifications required, and rates of pay for comparable positions in other organizations or fields. Salary ranges for each classification shall provide enough latitude to allow an ecumenical worker to enhance performance and to continue in a position without being deprived of salary advancement, or forced to take on a different assignment. When the beginning salary recommendations change, there shall be corresponding increases in the salary ranges for experienced workers at different levels of responsibility.

There shall be a systematic progression and a logical relationship between the salary ranges assigned to different classifications. When an employee's duties and responsibilities are changed through promotion, or increased significantly through a revised job description, the job should be reclassified and the salary increased accordingly. When the organization's salary ranges overlap, the principle of increased pay for increased responsibility shall apply. This principle would prevail even if the worker received a salary on the previous assignment equal to or higher than the minimum of the salary range for the new classification.

There shall be provision in the pay plan for annual increments within each salary range. The annual increments shall be a specified percentage of the employee's salary for all positions in the salary classification plan. The pay plan shall exclude payments "in kind" as part of total salary payments.

Additional merit increments should be given for unusual or superior performance that exceeds specific organization standards. If performance is unsatisfactory, regular increments can be withheld for a specified period not to exceed one year. Either improved performance or termination of employment in a specific position should result.

Temporary reclassification and pay adjustment shall be provided for regular employees who, in the absence of some other staff member, are assigned duties heavier than those they usually carry when such an assignment persists for a period exceeding the longest compensated leave possible in the organization.

### 13. REIMBURSEMENT OF EXPENSES

Expenses incidental to the job shall be provided by the organization in addition to salary. Policies governing payment of such expenses shall be established to cover actual costs. For example, staff

members shall be reimbursed for the following:

- 1) Costs incurred in connection with attendance at luncheons, conferences, and the like, when attended at the request or direction of the organization.
- 2) Actual out-of-pocket expenses.
- 3) Mileage rates sufficient to cover actual costs of operating and maintaining a car.
- 4) Expenses incurred in purchasing liability insurance when such extra expenses arise from use of a personal car for business purposes.
- 5) Local transportation expense incurred on business for the organization..
- 6) Expenses incurred in travel on business for the organization.

Reimbursement should be on the basis of written accounts detailing the nature of the expenses and amounts.

#### 14. SECONDARY EMPLOYMENT

Secondary employment is employment on a paid basis by an individual in addition to a primary employment obligation. It can provide personnel satisfaction and enhance professional competence.

NAES affirms that an employee's remuneration from primary employment should provide the means to maintain a standard of living appropriate for professional personnel in the community. Secondary employment to supplement income for this purpose should, therefore, not be necessary.

The following provisions shall govern secondary employment:

##### After Regular Working Hours

An employee has the right to engage in secondary employment as long as it does not interfere in any way with his responsibilities to his primary employer. Organizations should have governing policies including provisions that safeguard organizational operations when secondary employment may entail conflict of interest, or when there is evidence that it would negatively affect job performance.

Remuneration from secondary employment shall accrue solely to the employee.

When the primary employer's facilities and/or resources are used, the employee should obtain prior written approval. If reimbursement for such use is required by the organization, there should be a written understanding of the nature of such reimbursement.

The primary employer and the employee should establish a clear and written agreement which assures that the employee will not provide services in secondary employment to clients who would

be served by the primary employer except when a mutual agreement has been made.

### During Regular Working Hours

Activities such as teaching, conducting seminars, and speaking engagements not covered in the employee's job description for which the employee is reimbursed, are illustrations of this kind of secondary employment.

An employee has the obligation to seek advance approval of his employing organization for this kind of assignment. Although such activity may have secondary benefits for the employing organization, the organization retains final authority for approval.

Remuneration from this type of activity shall accrue to the employee.

Organizations should have policies governing this type of employment. If such policies include a provision for reimbursement to the primary employer for the time the employee is actually absent, it may be in the form of deductions from earnings, or by requiring the employee to utilize earned compensatory, vacation, or other leave time other than sick leave.

## **15. USE OF VOLUNTEERS**

The primary purposes for the use of volunteers shall be to enrich, extend, or otherwise supplement the services of the organization and its staff. When volunteers are used, the organization shall have a written policy that includes the following points:

- 1) A clear delineation of the functions and activities appropriate for volunteer and paid staff.
- 2) Written descriptions of activity for each type of volunteer used, and clear procedures that relate the volunteer to regular, paid staff.
- 3) Provision for reimbursement to volunteers for expenses, as appropriate.
- 4) Procedures for orienting and training as well as for monitoring the activities and contributions of volunteers to the service or program.
- 5) A statement of assurance that volunteers will not be utilized in any way that would decrease the use of paid personnel. It should be a fundamental personnel policy of any organization or institution making use of unpaid volunteers that such personnel will not be permitted to supplant regular paid staff.

## **16. STAFF DEVELOPMENT**

An orientation period shall be provided for any employee newly appointed to a position, whether coming from within or outside the organization, for the purpose of informing the employee of the

specific job duties and their relation to organizational function. The organization shall establish both policies and opportunities for ongoing staff development. Continued professional growth shall be expected by the organization of all professional employees.

Opportunities for continued staff development shall be afforded through provision of some or all of the following:

#### Internal Organizational Resources

- 1) Regular, planned staff meetings for discussion of the organization's program; work problems; methods; staff relationships, responsibilities, plans, schedules, etc.
- 2) Availability of organizational acquired professional literature.
- 3) A structured staff development program with qualified training staff.
- 4) Supervision and consultation from professionally qualified persons.

#### Use of External Resources

- 1) Links with educational institutions to provide opportunities for continuing education in ecumenical work, at both post-baccalaureate and post-master's levels.
- 2) Use of adult community educational resources in a planned career development program for personnel with less than a baccalaureate degree who are providing services.
- 3) Dissemination of information regarding conferences, institutes, workshops, and so forth related to the functions and goals of the organization.

#### Educational Leave

- 1) Provisions should be made for leave during working hours to attend conferences, institutes, workshops, or classes to advance the employee's skills related to the functions and goals of the employing organization. Such attendance in accordance with organizational policy shall result in no loss of pay or vacation time.
- 2) Provisions should be made for extended leaves for educational purposes so that employees may continue to upgrade professional credentials and further develop professional skills. Provisions for educational leave should be such as to make it financially feasible for employees to take such leaves.
- 3) Terms of such leaves should be clearly set forth. The worker on leave should be considered an employee, with all rights and benefits protected.

#### Financial Aid

It is the responsibility of the organization to make available to personnel information about opportunities for state, federal, or private grants-in-aid, scholarships, fellowships, or loans.

#### 17. FINANCIAL AID FOR PROFESSIONAL EDUCATION

If the organization establishes programs of financial aid to students for professional education at the baccalaureate, master's, or doctoral level, a written agreement shall be made between the organization and the student.

#### 18. PARTICIPATION IN ACTIVITIES OF PROFESSIONAL ORGANIZATIONS

Ecumenical work, like other professional fields, has undertaken professional activities largely through the voluntary participation of its qualified members. Individual members have viewed and should view such participation as part of their professional commitment. Organizations should encourage such professional activities and make time available to employees for them.

Since the range of professional activities is broad and varied, including participation in the stated meetings of the worker's denominational judicatory as needed, the organization should grant the worker time off to participate in such activities when prior discussions have concluded that the professional activity coincides with the organization's purpose, and the time off will not jeopardize the daily functioning of the organization. In those instances in which the employee has been assigned activities chosen to serve on such bodies as national boards, commissions, task forces, or committees; or asked to present a paper or lead a professional institute, the organization should offer no impediment to the employee's need for time off from organizational responsibilities. Time off for professional activities under these circumstances should not result in the loss of vacation, salary, or compensatory time.

#### 19. PERFORMANCE EVALUATIONS

As a basis for objective evaluation of performance, the organization shall set forth written standards of performance for all positions in its classification plan. Such standards shall describe the quality and quantity of performance expected for each job duty.

Each employee shall develop specific performance objectives for the supervisor's approval, and shall participate with the supervisor in the periodic review and revision of these performance objectives. Evaluations of performance shall be based on the organization's written standards for the position, and the specific performance objectives. Evaluations shall be made by the person or persons who directly supervise the employee.

Evaluations shall be made annually or on another agreed upon schedule:

- 1) When required for the professional development of the employee or the administrative needs of the organization;

- 2) When there has been a significant change in the performance of the employee; or
- 3) When the employee or the supervisor leaves the organization.

When a probationary period is required, there shall be an evaluation at the end of that period.

The evaluation shall relate specifically to the performance of the job assigned to the employee. The objective is to maximize strengths, avoid the pitfalls of weaknesses, and help the worker succeed.

The time of the evaluation shall be known in advance. Evaluations shall engage the joint participation of the employee, supervisor, and a small personnel committee. However, the authority of the evaluator must be recognized on both sides, and final authority belongs to the committee.

The evaluation shall be placed in writing and shall cover the points discussed in the evaluation conference. The employee shall be given the opportunity to read the evaluation, to sign it (signifying that he/she has read it), and to file a statement covering any points of disagreement. A copy of the evaluation shall be furnished to the employee. The employee shall have the right to obtain a professional review of an evaluation by higher administrative authority in the organization, and to add information on his/her performance to the evaluation record.

## 20. REFERENCES

Upon termination of employment, the worker shall be provided with a letter of reference by the organization, reviewed by the employee prior to leaving. The letter shall:

- 1) be factually correct and include all pertinent data;
- 2) state the relationship of the writer to the subject of the reference;
- 3) be limited in content to material and evaluations that have been communicated to the subject of the reference during the course of his/her employment.

## 21. PERSONNEL RECORDS

A personnel record must be maintained by the organization for each employee. It shall contain the application, contracts or agreements, description of work assignments, performance evaluations, and pertinent correspondence. It shall be open and available to the employee and contain no material or information that cannot be shared with the employee.

Material provided to or offered to the organization on a "confidential only" basis shall not be accepted or solicited by the organization or any members of the staff, except when required by law or federal regulation.

The written evaluation and employee's statement, if any, shall become an integral part of the employee's personnel record. The personnel record shall be kept strictly confidential and be available to authorized persons only. No information on an employee or from a personnel record shall be

furnished to persons outside the organization except when specifically authorized by the employee.

## 22. PROMOTION

The promotion of employees shall operate under the same standards governing selection of personnel and the organization's affirmative action plan. In other words, there shall be equitable consideration of all professionally qualified applicants without discrimination on such bases as physical disability, race, color, religion, age, residence, gender, sexual orientation, national origin, or membership in a union or an organization whose primary purpose is the protection of civil rights or the improvement of living conditions and/or human relations. Procedures for promotion shall provide for evaluation of persons on the basis of professional competence, and demonstrated ecumenical commitment which is designed to assure appointment of persons best qualified to discharge the organization's function effectively.

Promotion shall be based on evaluation of past performance, capacity for the vacant position, and the goals of affirmative action. When these factors are relatively equal for two or more employees, seniority shall be the deciding factor.

## 23. HOURS OF WORK

A reasonable number of hours shall be stipulated as a regular work week. It is recommended that the work week not exceed 40 hours.

Overtime on a regular sustained basis shall not be expected or required. When a significant amount of overtime cannot be avoided, a provision for compensation should be made, approved by the executive director. Overtime compensation paid in time, shall be at the rate of at least 1.5 hours per hour worked.

When necessary tasks (preparation of required reports, etc.) cannot be reasonably accomplished prior to a professional employee's termination with an organization, the employee and organization share a responsibility in making arrangements to assure completion of the work. Extension of the period of employment, use of compensated overtime, and use of the employee's own time may all be considered. In any event, a clearly understood arrangement shall be agreed in writing before termination.

Organizations shall make every effort to maintain hours of service that are responsive to constituency needs and provide opportunities for increasing the individual employee's efficiency. Variations from regularly assigned hours shall be mutually agreeable, insofar as possible, and shall be recorded in memoranda.

For organizations, institutions, or programs requiring regular evening or weekend hours, the plan or hours shall be clearly defined with the following limitations recommended:

- 1) No more than two work periods per work day.

- 2) No more than four evening work periods per calendar week.
- 3) A consecutive forty-eight hour period off in each calendar week.
- 4) At least one weekend of sixty consecutive hours off per month.

## 24. LEAVE

### 1) Annual Leave

A definite period of leave with pay shall be earned for services performed by all regular employees. An employee shall earn leave beginning in the first month of employment. It is recommended that such leave be at least seven days for the first year of employment, fourteen days for the second, third, and fourth years, and twenty-one days after the fourth year of employment. Such leave shall be accrued in days or hours per pay period.

To encourage the timely use of annual leave, organizations should establish a maximum level of accruable leave and take steps to assure that employees are able to take annual vacations and able to use leave accrued. The amount of leave accruable over two years is the recommended maximum amount. An employee leaving the organization shall be entitled to the annual leave due.

### 2) Sick Leave

The organization shall provide the employee with pay when he/she is not able to work because of illness, or when the employee's presence is temporarily required to care for members of his/her immediate family.

It is recommended that the rate be no less than ten work days per year, with the right to accumulate such leave to a limit of 30 days.

When an employee has used up accrued sick leave but continues to be absent because of illness, the employee shall be given the opportunity to substitute his/her annual leave pay. If no annual leave has been accrued or if the employee chooses not to use it for the purpose of sick leave, leave without pay shall be granted for a specified period of time. During absence on leave without pay, the employee shall not accrue sick leave or personal leave, but shall retain seniority rights.

### 3) Parental Leave

#### a) Maternity Leave

Provisions should be made for sick leave and leave without pay as maternity leave. Inability to work because of pregnancy shall be considered a medical disability and the employee shall have the right to use sick leave for it. Employees requiring maternity leave shall request it at least sixty days before the date on which the period of leave is to begin.

It is recommended that maternity leave be granted for periods of three to six months up to a maximum of one year. For shorter periods, the position will be filled temporarily if the employee plans to return. Beyond six months, when a suitable vacancy occurs in the staff, the organization shall reinstate the employee returning from maternity leave to a position comparable to the one she vacated, and she shall be paid at prevailing rates.

b) Paternity Leave

Fathers whose assistance is needed in the care of the children or mother shall have the right to use leave or to be granted leave without pay if paid leave is not available. The leave without pay shall not exceed the total of the employee's annual and sick leave.

4) Military Leave

Military leave shall be granted to employees who are inducted into the armed services. Employees on military leave shall be afforded the protection of their seniority rights and their status in the organization's retirement plan, and shall be reassigned promptly on return to civilian life. Provision shall be made so that employees called to individual military reserve training shall suffer no loss of regular income and no loss of vacation time over them. When an employee chooses alternative services as a conscientious objector, or is imprisoned for refusal to serve, he shall receive the same consideration as the employee who accepts military service.

5) Jury Duty

Leave for jury duty shall be provided so that employees called to serve on juries suffer no loss of regular income and no loss of vacation time due to such service.

6) Sabbatical Leave

It is recommended that sabbatical leave for personal and professional development be granted to employees after six years of service excluding leave without pay. It is recommended that sabbatical leave consist of at least three months with pay in addition to the annual vacation. Sabbatical leave should be contingent upon the employee's return to the organization for a period of at least one year following the completion of the leave.

7) Holidays

The personnel policy of the organization shall provide for the recognition of all legal and customary community holidays as paid leave time. Such holidays shall be specified in the manual. Employees authorized to work on holidays shall be granted premium pay at a specified rate.

## 25. WORKING CONDITIONS

Working facilities shall be such as to afford employees a reasonable degree of comfort, to insure the maintenance of health, and to make possible the discharge of duties efficiently. Working space and

facilities shall afford both privacy for professional activities and dignity for both employees and clientele.

## 26. RETIREMENT

Retirement shall be defined as the termination of employment under a specified payment plan in effect in an organization when the employee has reached retirement age and no longer wishes to work, or is no longer able to work.

Although the current practice is for planned retirement at the age of 65, the abilities and needs of individual employees, as well as the functions and staffing requirements of the organization, should be recognized in any retirement policy. Increasingly it is being recognized that employees have the right to be employed after they reach age 65 if they are able to perform satisfactorily. Consideration should also be given to shifting such employees from full-time to part-time work, but such a shift should be mutually agreed upon. There shall be no discrimination against employees because of age.

The following standards shall be incorporated into the organization's retirement policies and practices:

- 1) The organizational policy shall state the planned retirement age and contain provisions for retirement prior to the planned age, and for continuation of employment beyond such age when the individual's performance makes this possible.
- 2) The executive or designated person shall be charged with the responsibility of determining with the individual the plan for retirement or continued employment. Such planning shall be initiated six months to a year prior to the planned retirement date. The final decision to continue employment beyond the planned retirement age is the responsibility of the employer.
- 3) There shall be a written confirmation of the agreed upon plan.

## 27. PENSION PLAN

If possible, the organization shall provide for a pension plan to be administered by a competent retirement system, insurance company, or bank. Employers will need to see that their pension plans meet the standards of the Employee Retirement Income Security Act of 1974. All plans should be fully funded. If the plan is a contributory one, the organization's contribution shall be equal to or greater than that of the staff person.

It is recommended that the pension plan include the following:

- 1) Provision that entrance into the plan be mandatory for all regular employees after a specified period of time of not more than one year, with optional provision for payment retroactive to the date of employment.
- 2) Provision for entrance into the pension plan without a waiting period if the employee has had

retirement coverage elsewhere.

- 3) Provision for past-service benefits for employees who have rendered long-time service prior to adoption of the retirement plan.
- 4) Provision that benefits after twenty-five years of cumulative service be 66 percent or more of the highest three years of salary when the employee has given long-time service in one organization.
- 5) Provision for full and immediate credit to the employee of equities arising from the organization's and, in case of contributory plans, employee's contributions.
- 6) Provision for return of the employee's contribution plus interest if he/she leaves the organization and elects a cash refund, or provision for return of this contribution to the beneficiary in the event of the employee's death before benefits have begun.
- 7) Provision for the portability of pension benefits or, at least, the retention of benefit rights beyond coverage under the plan.
- 8) The pension plan shall clearly identify its relationship to and be separate from social security benefits.
- 9) When legally permissible, employers should inform the employees of and make arrangements for tax sheltered annuity plans when the employees choose this type of plan.
- 10) Provision for change of beneficiary.
- 11) Provision for various forms of optional settlement, including the joint and survivor option, guaranteed payments, and variable annuities.
- 12) Provision for continuance in the plan on an individual basis in the event that change in employment does not permit the individual to participate in a group retirement plan or in case of an approved leave of absence.

It is recommended that the employees be apprised annually or biennially of benefits accrued to their account as of a given date. It is further recommended that there be a periodic review (at least every two years) of the entire retirement program.

If a pension plan as complete as that above is not possible, especially for smaller organizations, a minimal plan should be arranged, such as a Keogh plan or an IRA allotment.

## 28. INSURANCE BENEFITS

The organization shall finance, in whole or in part, insurance plans to help employees meet certain financial obligations. The employer shall provide sickness and accident disability insurance. When benefits are available to spouse and families of employees, the benefits shall be granted equally without regard to the gender of the employee or whether the employee is the principal wage earner of the family.

Insurance plans shall include the following:

1) Health Insurance

Benefits for medical and hospital expenses.

2) Disability Insurance

- a) Compensation (including workers' compensation) equivalent to full salary and medical costs for a period of incapacity, not to exceed six months, as a consequence of a disability incurred in the line of duty.
- b) Continued compensation or disability payments for incapacity resulting from a disability incurred in the line of duty, the duration of which exceeds the six-month period referred to in a) above.

3) Liability Insurance

- a) The organization shall provide professional liability insurance.
- b) The organization shall provide liability and life insurance for work-related travel.
- c) The organization shall provide the cost of any additional personal auto insurance when the employee's auto is used on organizational business.

4) Unemployment Insurance

Organizations shall provide coverage for unemployment insurance for all non-ordained employees.

29. TERMINATION OF EMPLOYMENT

1) Layoff

- a) Layoff shall be defined as removal from a position due to the abolition of the position because of reorganization or retrenchment.
- b) The organization shall establish a formula governing the order in which employees shall be laid off. The formula shall be inversely applied if, at a later date, such employees can be rehired because of reorganization or expansion.
- c) The employee who is laid off shall receive severance pay in an amount related to the length of service.

2) Demotion

- a) Demotion shall be construed as removal from a particular position with an offer of a position of lesser responsibility because of the employee's inability to perform in the position of greater responsibility, or the abolition of the position of greater responsibility. (See Layoff)
- b) When demotion is offered to more than one employee as an alternative to being laid off, a formula similar to that prescribed to govern layoff shall govern the order in which employees are demoted. The formula shall be applied inversely in the event that those so demoted can, at a later date, be promoted as a result of acquired ability to perform in the position of greater responsibility and/or organizational expansion.

3) Dismissal

Dismissal shall be construed as the discharge of an employee from an organization.

4) Resignation

Resignation shall be construed as termination of employment at the volition of the employee. The employer shall not coerce an employee into resigning by threatening dismissal.

5) Termination by Employer Action

- a) The employer who terminates the employment of an employee shall give a reasonable amount of notice in writing. The employee shall acknowledge such notice in writing. It is recommended that the permanent employee be given at least thirty days' notice, and the probationary employee at least two weeks notice. When laid off, the probationary employee shall be entitled to at least thirty days notice.
- b) Pay in lieu of notice may be granted at the discretion of the employer.

6) Termination by Employee Action

- a) The organization shall specify the amount of advance written notice required in instances of resignation, and employees shall abide by organizational requirements in this matter.
- b) The employee shall provide written notice of the intent to resign as of a specific date and the employer shall acknowledge the receipt of this notice in writing.

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