



Clergy, Staff and Lay Leadership

Personnel Policy and Procedures

Revised 2014/2015

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Governing Body

The formal governance of the parish corporation is provided by the elected vestry and rector. The senior warden, nominated by the rector and elected by the vestry, is the chief lay officer of the parish. The rector, called by and responsible to the wardens and vestry, presides over the vestry and serves as chief operating officer of the parish.

Rector

The canon to the ordinary works with parishes in the time of a vacancy of the rector. The diocesan search manual fully describes the process and is available on the website (www.diocesewnc.org).

Tenure

A rector is called to a parish by the vestry with the approval of the bishop. His/Her tenure is to continue until dissolved by mutual consent of the vestry and rector or by arbitration and decision as provided by the relevant canons of the diocese of western North Carolina and the general convention.

General Responsibilities

- The rector is responsible for the worship, music, education and spiritual welfare of the congregation. These duties are described in Canon III.9 (see “Canons of the General Convention”).
- It will be his/her task to proclaim by word and deed the Gospel of Jesus Christ, and to fashion the church’s life in accordance with its precepts.
- She/he is to preach, to declare God’s forgiveness to penitent sinners, to pronounce God’s blessing, to share in the administration of Holy Baptism and in the celebration of the mysteries of Christ’s Body and Blood, and to perform the other ministrations entrusted to them. In all that is done, he/she is to nourish Christ’s people from the riches of His grace, and strengthen them to glorify God in this life and in the life to come.
- The rector responsible for the use all parish buildings; coordinating the scheduling and fees charged with the Parish Administrator.
- The rector works collaboratively with a church musician, but the Rector is solely responsible for music and worship.

He/She is to love and serve the people among whom he/she works, caring alike for young and old, strong and weak, rich and poor. The rector’s special ministry is to nurture the lay leadership to insure they are equipped to reach out to love and serve others both in the church and in the community. Much of his/her time and attention is spent in planning with lay leaders to ensure the most effective programs of ministry. The rector in conjunction with the vestry also recruits people to lead the various ministries, training, supervising and evaluating them and insuring that their morale remains high.

Work Week

The work week for the rector is normally five and a half days (5 ½) with a day off during the work week, to be negotiated. Because of the unique role of the priest and the central aspect of Sunday worship in the life of the church, the priest should make every effort to be present on Sundays unless on approved time off. Additionally a strong presence in the church office to both oversee the staff and meet with congregants is vital and expected.

Rector's Leave

Continuing Education Leave

The rector will be given two (2) weeks annually for continuing education time away from the parish, including no more than one Sunday. The vestry and the bishop are given a copy of the rector's continuing education plans and upon return a follow-up report. Time for continuing education does not accrue and should be used for study on an annual basis.

Sabbatical Leave

When a clergy sabbatical is included in the rector's letter of agreement, the congregation will annually allocate funds to be applied towards sabbatical expenses. The accumulated funds would pay for supply clergy and other related church expenses during the Rector's absence, plus provide a stipend for use by the rector to assist with any sabbatical expenses. The rector will continue to be paid a salary, social security, pension, housing, and medical insurance while on leave.

After seven (7) calendar years of employment, a clergy person may be eligible for five (5) weeks; for a period of renewal and study that is mutually beneficial to both vestry and clergy. Upon completion of the sabbatical, the rector is expected to provide a written report and presentation to the congregation on how the sabbatical enriched both the clergy and the congregation. Upon approval of vestry and the bishop vacation time may be added to the sabbatical. In a year that the sabbatical is taken there is no continuing education leave.

Planning for the sabbatical should start several years in advance of the actual sabbatical. A detailed written sabbatical plan is to be submitted at least six (6) months prior and receive approval by the vestry and bishop.

Vacation Leave

The rector earns four (4) weeks of vacation, including four (4) Sundays, after one year of employment. Vacation time may not be carried over to the next year and need not be taken consecutively

Personal/Sick Leave

Short term Sick/Personal Days accrue at the rate of one (1) day per month not to be accumulated beyond a year.

Long Term Medical/Disability Leave

With the approval of the vestry, long term medical /disability leave can be taken for up to four weeks of paid leave and up to eight weeks unpaid leave with annual paid vacation leave to run concurrently. In order to be eligible, the Rector must provide the vestry with any doctor or hospital records the vestry may request.

Paid Office Holidays

Paid office holidays in which the office is closed are consistent for the staff.

Documenting Leave Taken

The completed leave forms used by the rector and staff are reported to the financial administrator with vestry oversight of the executive committee.

Vestry Retreat

It is the rector's responsibility in collaboration with the wardens to plan and carry out an annual vestry retreat within one month of the parish annual meeting. The retreat should be structured to increase community among vestry members, provide direction for the coming year and heighten a sense of God's presence within the parish.

Executive Committee

The executive committee consists of the rector, senior warden, junior warden, and treasurer. The committee meets each month to review any church related items needing special attention or discussion

Vestry Meetings

The rector presides over all vestry meetings unless that authority is delegated to the senior warden. Prior to the vestry meeting, the rector and executive committee meet to set the vestry meeting agenda, incorporating the ideas and concerns of the vestry and members.

Staff Meetings

The rector is expected to call and chair weekly staff meetings with parish staff.

Letter of Agreement

When a new rector is called, a covenant is signed between the rector, the senior warden (on behalf of the congregation) with approval by the bishop, outlining the compensation details and the work expectations of the Holy Cross rector. A more detailed and specific job description is located under job descriptions.

Hiring and Supervising Assistants/Associates

Pending financial considerations, the rector may hire lay or ordained assistants to help in specific areas of ministry. While the hiring decision belongs to the rector alone, the vestry or executive committee will act as a screening committee to help the rector make the best choice possible.

Staff

All paid staff both part and full time are accountable to, report to and are hired by the rector. Each employee undergoes a yearly performance review by the rector before September 30th of each year.

Mutual Ministry Review

A mutual ministry review is to be conducted each year. The mutual review will evaluate the total ministry of the parish in order to:

- Provide the rector, wardens and vestry opportunity to assess how well the areas of church ministry are being addressed and the mission of Holy Cross is being met.
- Evaluate progress on the accomplishment of set goals and objectives
- Isolate areas of conflict or disappointment, which have not received adequate attention and may be affecting the parish
- Clarify expectations of all parties to reduce any future conflicts.

The Mutual Ministry Review will be held before the end of September to insure decisions made during the review will be reflected in the following year's program and annual budget. The review will be conducted by someone outside the parish who is trained in this process and approved by the canon to the ordinary

See attachment 1 on page 39, Policy regarding Mutual Ministry reviews in the Diocese of Western North Carolina.

Vestry

Terms of Office:

The Holy Cross vestry is composed of twelve people, four of which are elected each year for a term of three years. A vestry member is not eligible for reelection in the year following the expiration of his/her term unless he/she is finishing an unexpired term of another person.

General Qualifications and Gifts for vestry Membership

- Love God and demonstrate a commitment to following the way of Christ
- Regularly attend worship and other rights of the church
- Have a meaningful life of prayer, study and reflection
- Be active and informed about the congregation, its programs, and governance
- Be known as someone who is fair, interacts well with people, and is respected in the congregation
- Give joyfully to the work of Christ in the parish. If you are not tithing, you should have tithing as a goal
- Participate in the stewardship campaign by making a written pledge
- Care deeply for the ministry of your parish in the service of Christ and with enthusiasm for serving as a Vestry member
- Communicate directly with the people, and do not engage in gossip or complaining
- Be willing and able to speak up at Vestry meetings
- A confirmed Episcopalian and be at least sixteen years of age.
- Be a member of this parish for a year

Prayer

Prayer and the study of Scripture should always be a regular part of the life of the vestry. Vestry members are spiritual leaders of the congregation and that dimension of their life and work must be nurtured and nourished. It is essential to take time to reflect and listen before taking up the business of the church.

In addition, a strong private life of prayer is essential to fulfilling our baptismal Covenant and to remaining in a bonded relationship with Christ. The Centers for Christian Studies has many opportunities to learn more about prayer and will provide help finding a spiritual director as well as resources that may be of assistance to individuals and vestries.

Major Vestry Duties

- Be an example of Christian love and charity, encouraging the spiritual growth of all members
- Regulate the temporal concerns of the parish
- Be in charge of all property and assets of the congregation
- Be legal representatives of the parish
- Have power to hire a priest with the consent of the bishop
- Set policy and procedures for parish life and programs (consistent with diocesan and national canons)
- Take an active part in vestry discussions
- Set the budget and determine financial priorities for the congregation
- Exercise good stewardship of the parish's assets by ensuring that adequate financial controls are in place and that the Parish is operation pursuant to *the Manual of Business Methods in Church Affairs*
- Monitor financial data to ensure that the parish is staying on budget and living within its means
- Determine the amount of the Diocesan pledge
- Negotiate the salaries for the clergy and lay church employees in accordance with Diocesan guidelines

- Assist the clergy of the church in developing the spiritual life of the congregation and furthering the gospel
- Raise the funds necessary to operate the parish and to disburse funds for outreach
- Provide for the holding of public worship in the absence of a rector or interim rector
- Buy, sell, encumber or alter any church property with the consent of the diocesan bodies (trustees and standing committee)
- Maintain all church buildings and property in the best possible condition
- Set goals and objectives for the ministry of the Parish
- Chair at least one major committee or Ministry.
- Hold position as vestry oversight of a major ministry category

Time Commitment (Three year term of office)

- Vestry meetings
- Vestry retreat at own expense
- Important congregational events (to stay informed and connected)
- Weekly worship services (rotating occasionally if there is more than one service)
- Annual Meeting
- Meetings with committees and sub committees as needed

The Clerk of the Vestry

The Clerk of the vestry is the secretary and is elected by the vestry, although she or he need not be a member of the Vestry. The role of this person is to record the minutes of vestry proceedings, preserve all records and papers belonging to the parish, and to attest the public acts of the vestry. The Clerk may either be a vestry member or a member of the congregation.

Meetings

The vestry usually meets once a month, but may take time off during the summer. The rector or their designee presides at all vestry meetings. The meetings are open to the congregation and votes recorded in the minutes, which are available to the entire congregation. Executive session may be called so that the vestry may discuss sensitive topics in private, but the results of the discussion will always be transparent to the congregation. Executive session is usually only appropriate when discussing personnel matters, legal matters, or issues related to the sale of property. Special meetings may be called by the rector, or in the absence of ordained leadership, the senior warden. It must be done with knowledge of and consent of the rector. When the rector's annual salary, compensation and ministry review is to take place, the vestry may wish to ask the rector to leave the room and the meeting will be presided over by the senior warden.

The norm for monthly Vestry meetings should be no more than two hours. Every meeting should begin and end with prayer. The finance report must be critically reviewed monthly and any policy changes should be early on the agenda. The gathering of information and analysis should happen in committee with the recommendation of the committee being brought forth to the Vestry for a broad overview presentation and limited discussion by the Vestry. The Vestry's role then is not to rehash the entire work of the committee but to ask clarifying questions with the intention of accepting the committee's recommendation. This behavior is an essential part of working together as a team, building trust and valuing one another's work.

General Committees

The Vestry is organized into categories of ministry. The number and type of ministries within each category will fluctuate depending on the needs of the congregation and the community. Members of the vestry except the senior warden and junior warden chair one of the major categories and one major committee, preferably one in the category where they have oversight.

Collaboration between Vestry and Rector

The Vestry and the Rector work together as a team. Both the Rector and the Vestry are concerned about the spiritual life of the congregation and both are concerned about temporal matters.

Each category of oversight is composed of various committees that are chaired by others but mentored on a regular basis by the designated vestry member.

Each September the Vestry and Rector will participate in a mutual ministry review

Fiscal Responsibilities

The Vestry is responsible for seeing that every member of the parish is asked to make a financial pledge for the support of the mission for the church. The Vestry approves the annual budget and is responsible for seeing that the Parish's annual pledge to the mission of the diocese for the coming year is received by the diocese by December 10th each year. The vestry is also responsible for seeing that there is an annual audit of all financial records. The Vestry is the sole representative of the congregation in its relationship with the clergy of the Parish

Consensus Decision-making

Important decisions such as the calling of a new Rector or establishing a new direction for the parish should be made by consensus. A consensus decision should not be reached until the Vestry has had adequate opportunity to talk together and listen to what everyone has to say long enough for clearness to emerge. If there is no consensus, the decision should be tabled until, through prayer and discernment, the matter can reach consensus at a later time. When you agree to a consensus decision, you must be willing to abide by the following three statements:

1. I can support the decision, even if it is not my first choice.
2. I would be willing to help implement the decision if asked.
3. I will *never* speak against the decision to anyone.

Those decisions that must be attended by a vote will be so approved.

Behavior Norms

Our baptismal covenant commits us to respect the dignity of every human being — including our fellow Vestry members and the clergy. We are to speak in truth and love and build up the Body of Christ. Vestry members may on occasion have conflicting views on issues. It is critical that such disagreements (which, in themselves, may be normal and healthy) not become personal.

It is also a norm that a Vestry person who has an issue with or conflict with another Vestry person or the clergy will directly address the issue with that person rather than go behind the person to others to get resolution. Such “triangulating” is very easy, but can be very destructive. The harder path of dealing directly with someone is unquestionably more difficult but is also very important. There are skilled trainers in our Diocese who can help vestries create effective, supportive behaviors that celebrate the common goals and values and help minimize destructive behaviors.

Sr. Warden

Upon the Rector's nomination, the Senior Warden is elected by the Vestry from the Vestry. The term is for one year. The Senior Warden is head of lay membership in the parish and responsible for leading the Vestry meetings in the absence of the Rector. The Senior Warden serves as the legal representative of the parish and is in charge of all church activities in the absence of the Rector. The Sr. warden meets with the rector to discuss and advise on parish matters.

Qualifications

- Meet all other qualifications for vestry membership
- Be known as someone who is fair, interacts well with people and is respected by members of the congregation

Time commitments

Attend Vestry meetings, Vestry retreat at own expense, weekly worship services, parish events, weekly staff meetings, meetings as needed with the Rector, and the annual meeting

Responsibilities

- Conduct the Vestry meeting in the absence of the Rector
- Conduct the Annual Meeting in the absence of the Rector
- Oversight for half the vestry ministry responsibilities in coordination with Jr. Warden.
- Assist ministries/committees where matters of general church matters are a concern.
- Assist and support the rector in visiting anyone known to have a major concern or pastoral issue.
- Meet frequently with the Rector to review the life and work of the congregation.
- Be able to maintain confidentiality where appropriate.
- Encourage people with complaints to speak directly to the leader in charge of the committee or ministry of concern.
- Where the Rector, staff or vestry are beleaguered or criticized, foster understanding and distribute accurate information.
- Take action to intervene promptly in the event that the Rector is charged with misconduct, has problems with drugs or alcohol and is acting inappropriately; speak with the Rector and bishop when appropriate.
- Be prepared to assist the Rector in unexpected situations.
- Provide leadership to identify the vision, mission and goals of the congregation during the annual Mutual Ministry Review.
- In the absence of the Treasurer, the checks may be signed by the Senior Warden or other authorized signee.
- **Attend weekly parish staff meetings if possible**
- **The senior warden sits on the financial committee the year after service to provide continuity and perspective.**

In the Absence of a Rector

- If the Rector leaves, notify the bishop and make provisions for worship services
- When without a Rector, lead the congregation ensuring that the worship, program and pastoral care needs of the congregation are met. Start the rector discernment process and make sure employee relations are maintained and communications continue with the diocese.

Junior Warden

The Junior Warden is elected by the Vestry from the vestry upon the Rector's nomination. The term of office is for one year. Normally the Junior Warden becomes the Senior Warden the following year.

Qualifications

- Meet all other qualifications for vestry membership
- Be known as someone who is fair, interacts well with people and is respected by members of the congregation

Responsibilities

- Assist Rector and Senior Warden in providing leadership in the Vestry.
- Provide leadership to the congregation by seeking to solve problems and learn from mistakes.
- Oversight of the vestry member ministry responsibilities in coordination with Sr. Warden. The Jr. Warden also assists where matters of general church concern are involved.
- Meet regularly with Rector and Sr. Warden and various committee chairs as needed.
- Be prepared to assist the Rector in unexpected situations.
- Provide leadership to identify the vision, mission and goals of the congregation during the annual Mutual Ministry Review.
- Attend weekly staff meetings and other meetings as needed.
- Be member of the Executive Committee

Treasurer

The Treasurer is elected by the Vestry and need not be a member of the Vestry. Treasurers are church finance stewards who serve under the direction of the Vestry.

Qualifications

- Ability to establish and maintain appropriate safeguards and oversee persons assisting the financial transactions;
- Knowledge and understanding of insurance requirements, audit requirements, energy audits and legal liabilities

Time commitments

Finance meetings, Vestry meetings, Vestry retreat at own expense, oversee collection tabulations, deposits, periodic payment of bills and attend annual meeting. The Treasurer supervises the work of the Financial Administrator.

The Treasurer informs the Vestry that they have final responsibility for the fiscal well-being of the parish property and must see that the facilities are maintained and that all bills are paid. If there is a deficit at the end of the year, the Vestry must eliminate it either by subscription from parish members or by various personal contributions.

Church Finances

All parish financial records, excluding the individual pledge records and records of discretionary fund contributions should be a matter of public scrutiny. The church is a public-servant institution and there the constituency has a right to full disclosure. There should be no secret funds and the salaries of all employees should be readily available.

The responsibility and accountability for the stewardship of church money and property required of the Vestry and Treasurer is described in the canons. The Diocesan Department of Finance assists parishes in identifying and implementing these areas of responsibility. Below is a listing of various canons, resolutions and policies of which a Vestry member should be aware.

Lay Employee benefits

A 1991 resolution of General Convention mandates that all lay employees working more than 18 hours/week must be included in a pension plan. It is also a moral imperative that lay employees should also be included in a health insurance plan. The Vestry should offer to contribute on a pro rata basis the cost of medical insurance and retirement for all part time employees, clergy or lay.

Business Methods and Accounting Principles

The responsibility and accountability for stewardship of church money and property is delineated in Title I, Canon 7, of the Canons of the Episcopal Church. Certain business methods and accounting principles and practices were approved by General Convention in 1979, to be implemented in every parish and diocese. By resolution, the General Convention authorized publication of the Manual of Accounting Principles and Recording Practices for Episcopal diocese, parishes and missions. The General convention authorized the Executive Council to revise and update the Manual periodically. The current edition is now titled the *Manual of Business Methods in Church Affairs*.

Full-disclosure reporting

Non-profit organizations have the responsibility of reporting to their contributing sources (which includes the parishioners in a parish) all the assets, liabilities and fund balances belonging to the organization. Full disclosure requires that all funds of a parish, regardless of source, structure or separation of management, should be reported on a single set of financial statements with appropriate supporting exhibits and data relating to the various fund balances. For example: operating funds; endowment and trust funds; discretionary funds; funds of parish organizations; real estate funds including land, buildings, furniture and equipment and the cost of improvements. The expenditures within a fund should be properly outlined.

Annual audit

All accounts of Parishes and aided Parishes **MUST** be audited annually by an independent certified public accountant, or independent licensed accountant, or an audit committee authorized by the diocesan Department of Finance. All audit reports, including any memorandum issued by the auditor regarding internal controls or other accounting matters, together with a summary of action taken or proposed to be taken to correct deficiencies or implement recommendations contained in the memorandum, should be filed with the Bishop not later than 30 days following the date of the report, and in no event later than Sept. 1 of each year, covering the financial reports of the previous calendar year. (*National Canon 1.7 .1.5*)

It is expected that the larger Parishes will comply with an audit by a CPA. If the Parish uses an audit committee, it is recommended that the parish conduct a CPA audit every three years. Audit guidelines and procedures are available from the finance office.

Diocesan commitment

Each parish is required to submit its financial commitment to the diocese by Dec. 12.

Budget of the diocese. Ten percent of the average of the past three years Net Disposable Budget Income shall be the expected minimum level of giving to outreach ministries.

Business methods for trust and permanent funds

Parish trust funds, permanent funds and securities must be deposited with a bank, Diocesan Corporation or other approved agencies. Two signatures must be required for withdrawal. Records of trust funds must be kept, showing source and date, terms governing use of principal and income, frequency and recipients of reports of condition, and how the funds are invested. (*National Canon 1.7,1-2*)

Fidelity bond

Treasurers and custodians for any funds that exceed \$500 during any year shall be bonded. (*National Canon 1.7.1.d*) If you are insured by Church Insurance of Vermont, everyone the parish authorizes to handle money is bonded. If not, check with your insurer.

Financial reporting

The Department of Finance of the diocese may require copies of any and all accounts of a Parish. (*National Canon 1.7.1.i*) All Parishes and missions must prepare financial statements on a monthly basis. The standard financial statements required of each parish admission are: 1) statement of assets and liabilities resulting from cash transactions (balance sheet); 2) statement of cash receipts and expenditures; and 3) when applicable changes in financial position. Budgeting of parish income and expense is essential to proper planning and control. It is essential that the monthly financial reports to the Vestry compare actual income and expenditures with the budget.

Cash Basis accounting

Parishes should keep their records and prepare financial reports on the cash basis. This does not preclude the use of accrual basis accounting by those desiring to do so.

Fiscal year

The fiscal year shall be beginning Jan. 1. (*National Canon 1.7.1.j*)

Financial Responsibility

It is the Vestry's responsibility to meet all the current annual obligations of the parish.

Operating fund deficit

The canons state that if the treasury is deficient, the Vestry shall collect, as far as practicable, by subscription or otherwise, a sum sufficient to liquidate all of the current annual obligations of the parish. (*Diocesan Canon 10*)

Payment of employee compensation

The canons state that the Vestry shall pay with punctuality, at the intervals agreed, the stipulated salary of the Rector or vicar and others. (*Diocesan Canon 10*)

Offerings

The canons state that the Vestry shall inform themselves of the orders and times of ALL offerings required by the canons of the diocese and take measures for the obedient fulfillment and due liquidation of these obligations. (*Diocesan Canon 10*)

Bishop's visitation

It is customary that the plate offering received at the time of the Bishop's visit be designated to the Bishop's Discretionary Fund.

Clergy Pension

All Parishes must pay the Church Pension Fund assessments due on the salaries and on the compensation of the clergy. (*National Canon 1.8.3*) For any cleric who is engaged in compensated church work for a period of three consecutive months in the same church and receives a minimum of \$200 per month, assessment must be paid on his or her behalf at 18 percent of that compensation by that church. This applies to full-time, part-time, supply or interim work. For purposes of calculating clergy pension assessments, use compensation for self-employment, utilities allowance and any compensation for self-employment (Social Security) taxes. If the Parish provides living quarters rent-free, the housing amount is figured as 30 percent of the cash salary, utilities allowance and any compensation for self-employment tax combined.

Lay Pension

All lay employees who work a minimum of 1,000 hours annually should be provided retirement benefits through participating in the Episcopal Church Lay Employees Retirement Plan or an equivalent plan, the provisions of which are at least equal to those of ECLER. If the plan is a *defined benefit plan*, the parish's contribution shall be not less than 9 percent of the employee's salary, and if the plan is a *defined contribution plan*, the parish shall contribute not less than 5 percent of the employee's salary and agree to match employee contributions up to another 4 percent of the employee's salary. The Parish may impose a minimum age of 21 years and a minimum employment period not to exceed one year of continuous employment before an employee would be eligible to participate. (Resolution D165a of General Convention, 1981)

Worker's Compensation

Every Parish or mission employing three or more persons must provide Worker's Compensation insurance coverage.

Financial Support for Parishes in Need

Diocesan financial support of parishes in need is based on the expectation that these parishes should plan internally to phase out the diocesan support over a mutually agreed period of time, depending upon the circumstances of each case. The following policies of this expectation:

- 1) Each aided Parish is expected to conduct a face-to-face every-member commitment stewardship program each year. Financial support will not continue to any aided Parish that fails to conduct its stewardship in terms of this commitment. Diocesan assistance for inaugurating such a program is available from the Commission on Stewardship.
- 2) Each aided Parish will be contacted annually to ascertain how much more financial support can be assumed by the Parish in the coming year without diminishing its diocesan commitment. It is expected

that each aided Parish will have a five-year plan in place to reduce and ultimately eliminate the diocesan aid.

3) Each aided Parish is required to submit semi-annual reports to the diocesan finance office. Monthly aid checks from the diocesan operating fund will be contingent on the timely receipt of these reports.

Reporting Clergy Earnings to IRS

All clergy employed by parishes and missions are considered employees for income tax purposes. They are considered self-employed for *Social Security tax purposes only*. Therefore, all clergy so employed must file a 1040 SE return and pay the self employment tax. Only clergy who have exempted themselves from the Social Security system on the grounds of conscientious objection to the receipt of government-funded insurance are excluded from this requirement. Clergy should not receive a Form 1099 for reporting income from parishes. They should receive a Form W-2 showing the salary received. The W-2 differs from that of a lay employee of the parish. The primary differences are:

- 1) Social Security taxes are not withheld, because clergy are considered self employed for Social Security purposes.
- 2) Federal income taxes may be withheld or not, as the cleric wishes. The cleric may also request withholding to cover amounts due for the self employment tax.
- 3) The income reported on Form W-2 should include salary, compensation for self-employment tax, auto allowance and any other compensation for which the cleric has not reported in detail to the Parish. The auto allowance is excluded in this amount if the cleric is required to account to the parish for the expenses. A housing allowance is not required to be reported on Form W-2, provided the entire amount of the allowance is excluded under Section 107 if the Internal Revenue Code. However, IRS prefers that the housing allowance be reported on form W-2, as a separate memo notation. The cleric should use Schedule C for reporting income and expenses related to self employment, such as individual fees for performing marriages, baptisms and other personal services.

The Rector's Professional Allowance:

Reimbursement Plan for Professional Expenses

An employee of a parish may establish an *accountable or reimbursement plan* with the parish for expenses paid or incurred by the rector solely for the benefit of the parish. Accountable plans can cover business expenses such as travel and automobile expense, meals and lodging when away from home overnight, allowable educational expenses and other expenses, which are solely for the benefit of the parish. Under a reimbursement plan, the Vestry establishes a written plan and adopts a resolution up to the budgeted amount. The plan must require the employee to substantiate within 60 days all business expenses using an account book, diary or similar statement. The plan must require that the employee return any amount in excess of the substantiated expenses covered by this arrangement within 120 days. If the employee conforms to all the above, the amounts paid to him or her may be completely excluded from the tax return and Form W-2.

Clergy Housing Allowance

The housing allowance is the most important single tax break available to clergy. Money spent by the cleric to provide, furnish and maintain a principal residence is excluded from federal income tax return subject to certain limitations. The Vestry must pass a resolution stating the cleric's housing allowance prior to the first paycheck each year. The cleric advises the Vestry of the amount of his/her compensation to be designated as housing allowance. There is no limit on the cleric's compensation that can be designated by a church as a housing allowance. The cleric is responsible for reporting to the Internal Revenue Service the lowest of the following amounts:

- actual cash spent;
- fair rental value of the house (if parish does not provide a residence for cleric), fair rental value of the furnishings, maintenance, taxes, insurance, and utilities; and
- Amount specified in the Vestry minutes before the money is paid. The cleric should be given a letter from the Vestry stating the resolution for IRS compliance and documentation. *Sample Vestry housing allowance resolutions are attached on pages 34-35.* Churches that fail to designate an allowance in advance of calendar year should do so as soon as possible in the New Year. Churches should consider adopting a “safety net” allowance to protect against the loss of this significant tax benefit due to the inadvertent failure by the church of designate an allowance. It is also recommended that the parish budget reflect a separate line item for the housing allowance. The amount of the housing allowance may be amended during the year if the original allowance proves to be too low. However, the amended allowance will only operate prospectively. Under no circumstances can a cleric exclude any portion of an allowance retroactively designated by a church. A housing allowance is excluded from federal income tax: however, it must be included in a cleric’s self-employment earnings.

Discretionary Funds

The primary purpose of a discretionary fund is to assist people in time of need. The alms and contributions at the administration of Holy Communion on one Sunday in each calendar month may be allotted to the Rector’s discretionary fund for the poor and needy. Other discretionary funds may be accumulated and applied to such other works as in the opinion of the minister will further the work of the church. Discretionary fund gifts by church members and others, unless otherwise designated, are to aid those in need. If personal gifts and Sunday collections are not enough to assist the needy, the discretionary fund may be supplemented by funds designated by the vestry in the annual operating budget. The fund belongs to the parish and checks will be issued in accordance with the rector’s instruction. The Discretionary Fund is administered by the Parish Treasurer. The bank account is in the name of the parish. The Rector controls how the funds are used, but the checks are processed through the financial administrator. This, of course, requires confidentiality on the part of the Treasurer and financial administrator, but it has the advantage of creating a “paper trail” that protects both the cleric and the Parish. Discretionary funds are included in the annual Parish audit.

Tax-Exempt Status

The Episcopal Church has been determined to be exempt from federal income tax an organization described in Section 501(c)(3) of the Internal Revenue Code of 1954. Copies of this exemption are available from the diocesan finance office for the Parish’s use in applying for grants under this status.

Church Building and Financing

The Vestry should notify the Bishop of any plans for new construction and /or building renovations. The Bishop should also be notified of any plans to borrow funds and encumber property. The Vestry should request the *Building and Financing Process* packet from the diocesan office. If new construction or renovation of worship space is planned, the Vestry should contact the diocesan Architectural Committee prior to any plans being developed. All parishes should secure the advice of the Architectural Committee regarding new buildings, structural alterations or additions to any present building on the church property. The Parish or aided parish is required to submit to the commission the following: a) intention to initiate; b) schematic drawings and specifications; c) design development drawings and specifications; and d) such other plans as shall be required by the commission. Following construction, as-built drawings and specifications should be furnished to the diocese.

Sale of Property

According to the diocese, whether contiguous or separate parcels, all properties must receive approval from the various diocesan committees before a sale can be made. A proposal should be prepared which includes the physical location and complete description of the property (with maps and pictures); history of the property; reasons for disposal; and any future plans. A property appraisal by a licensed appraiser is the first step toward the disposal of any property. The parish will be assisted by the Canon of the Ordinary as needed.

Church Debt

Indebtedness may be incurred by a Parish without the prior approval of the Bishop and the Department of Finance, where the debt service (i.e., annual payments of principal and interest), including debt service for all indebtedness heretofore incurred for current expenses and still existing, does not exceed 20 percent of the total annual receipts of such parish during the preceding fiscal year. Short-term indebtedness in excess of the 20% limit may be incurred when there is reasonable expectation that it can be repaid in its entirety out of parish receipts within the next three years, and budget provision for such repayments has been so made. No further indebtedness may be incurred without the prior approval of the Bishop and Department of Finance. The Bishop and Fiscal Ministries must be notified before any short or long-term indebtedness is incurred.

Personnel Policy

Introduction

This handbook applies to all employees of the parish and is intended to provide guidelines and summary information about personnel policies, procedures, benefits, rules of conduct, and general policies for daily operation of the parish.

It is not possible to anticipate every situation that may arise in the workplace or to provide information that answers every possible question. This handbook is not intended to provide all information on any given subject nor in any way to create a contract. In order to keep it current and accurate, it will be revised annually no later than October and changes will be approved by the Vestry.

Compensation, Work Hours and Benefits

All compensation schedules and benefits are established and reviewed by the Vestry and Rector before October each year for purposes of establishing the budget.

Employees are paid on the fifteenth and the last day of each month for work previously performed. If a regular payday falls on a holiday or a weekend, employees are paid on the preceding working day to the scheduled payday.

Employee Agreement Statement

Every employee of the Parish will have a written **yearly** *Letter of Agreement* to include compensation, benefits, professional leave policy, sick time, vacation time, and other matters which directly affect the job description. Agreements will be signed by the Rector and the employee, with each party retaining a copy. Continued employment will be based on acceptable job performance at the annual review and funds available from the parish budget. All employees are at will.

Compensatory Time for Salaried Employees

In the ministries of The Parish, irregular working hours and extra working hours are sometimes necessary. This is especially true in the cases of weekend programs, evening meetings and conferences, funerals, weddings, and high holy days. With prior written approval of the Rector and reasonable written documentation and notification, the Rector will grant compensatory time off for irregular and or extra working hours, which exceed the hours in the employee's written agreement. Compensatory time will be offered in lieu of overtime payment. Compensatory time must be taken within a four week period of the overtime.

Health Insurance

Coverage may be offered to full time employees who meet minimum work requirements of 30 hours per week. Coverage will be in place within 30 days of employment. There is no waiting period for health insurance. An employee may be asked to contribute to the cost of healthcare premiums. At no time will monetary compensation be offered if insurance is declined. If at any time during an Employee's tenure the employee would like to revisit the insurance offer, this can be discussed with the Rector, along with adjustments to salary.

Pension

The Parish will contribute the percent of employee salary as defined by the National Canons to the Church Pension Fund and comply with WNC Canon 10.12. for employees working 20 hours or more per week.

After 5 years-9	15 work days/year
After 10 years	20 work days/year

Formal Leave

Employees are granted three types of formal leave which may be paid or unpaid for absences...including medical leave, personal leave, and leave for continuing education or special circumstances. The Parish Administrator keeps a record of the absences and leaves. These records will be kept to document and calculate time off benefits and for performance management purposes. It is the responsibility of employees to make arrangements and to seek approval in advance of any anticipated leave. The Financial Administrator will record all employee absences either expected or unexpected.

Sick/Personal Leave

It is our policy to provide full-time employees with an accrued benefit for absences at the rate of one day every month. The maximum number of days which may be accrued is 12 days in one year. In instances of extraordinary personal tragedy, the Rector in conjunction with the Executive Committee may concur in affording up to 1 full pay period for an employee who is unable to work. The parish provides for medical leave without pay beyond an employee’s accrued paid sick/personal days. This leave may be renewed in 30 day increments up to a maximum of 120 days with a supporting doctor’s statement and the prior approval of the rector and personnel committee. Employees will not be paid for unused accrued sick/personal leave. Medical leave due to pregnancy and pregnancy related disability is handled the same as all other medical conditions.

Family and Medical Leave Act:

It is the policy of the parish to provide eligible employees unpaid leave in accordance with the Family and Medical Leave Act. To provide a fair and systematic procedure by which eligible employees may take leave for medical and family reasons, the parish adopts the following guidelines:

- Employees who desire to take leave under this policy shall request such leave from the rector and personnel committee, or in case of the rector, the request is submitted to the vestry.
- For employees to be eligible for this leave, they must have been employed for a minimum of 12 months and have worked at least 1250 hours in the previous 12 months.
- Employees may take a maximum of 12 work weeks of unpaid leave during the calendar year.
- Family and Medical Leave may be taken for the following purposes: the birth, adoption or foster care placement of a child; to care for a seriously ill spouse, child or parent and serious health condition of said employee.

When the necessity for extended leave is foreseeable, employees should provide at least 30 days notice to the Rector and personnel committee. If leave must begin prior to the 30 days notice, the employee should provide as much notice as possible. The request for leave to care for a seriously ill spouse, child or parent, or for the employee’s own serious health condition should be supported by an appropriate certification.

Bereavement Leave

An employee who is absent from work due to a death in the family will be paid up to a maximum of three regular workdays following the family member’s death. This benefit applies only in the death of a parent, sibling, child or stepchild, spouse, in-laws, grandparents, grandparents-in-law, or for a foster child residing in the employee’s home.

Jury Duty

Employees will receive regular pay when performing jury duty or responding to a court summons. It is expected that the employee will report for their regular duties whenever temporarily excused from court attendance.

Equal Opportunity Employer

It is the policy of the Parish to be fair and impartial in all its relations with employees and applicants for employment without regard to race, color, gender, age, national origin or disability.

Immigration Law Compliance

Federal law makes it unlawful to knowingly hire a non-U.S. citizen not authorized to work in the United States or to continue to employ if it becomes known the employee is not authorized to work in the U.S. Accordingly, the Parish must verify the citizenship and complete an I-9 form for all new hires. Such documentation will be maintained in a confidential personnel file.

Inclement Weather

In inclement weather, the Parish office will generally follow the guidelines for local schools.

Professional Conduct

Personnel Records

All personnel records are maintained in a confidential file in the parish office. It is the responsibility of employees to keep all records correct and up to date; verifying on at least an annual basis that personal information such as name, address, phone number, marital status, number of dependents, and emergency contact are correct. Written job descriptions, a copy of the Employee Handbook Acknowledgement Form, a record of leave accrued and annual reviews will also be kept in this file. Employees may review their files by making an appointment with the Parish Administrator.

Staff Cooperation

The staff is a team ministry reflecting the highest ideals of Christian community. At such times that there is controversy or conflict between or among parish employees, the matter is settled quickly and collegially in the presence of the parties concerned and the rector. The Rector has the ultimate authority to settle disputes, in conjunction with the Executive Committee when appropriate.

Demeanor and Maintaining Confidentiality and Privacy:

Employees are extensions of the church's ministry at all times. Consequently, all parish employees must be courteous to and respectful of each other, communicants of the Parish and visitors. Instances in which any of the above mentioned persons may be angry, overbearing or inappropriately directive with an employee will be politely received and reported as soon as possible for direction and counsel. Inappropriate behavior and demeanor may be grounds for termination.

Employees must recognize and acknowledge that information gained while employed is of a confidential nature and must be kept as such. Employees shall not during the term of or after termination of employment disclose in any way such confidential information to any person, firm, corporation or any other operation or entity or use the same on the employer's behalf, for any reason or purpose. All employees will be required to sign a confidentiality pledge. Revealing confidential information constitutes grounds for termination.

Professional Training and Background Checks:

Parish employees are asked to complete all required, recommended and or suggested training available through the parish. The training is dependent upon the position in which the employee has been hired. Specific training requirements and recommendations will be included in the employee agreement. Background checks (5 Year Reference Check, Credit Report and or Driving Record) and drug testing may be required. It is the responsibility of the Rector to complete all required checks according to Diocesan policy. Required checks will be outlined in the employee agreement.

Grievances

Work related disagreements, complaints, and dissatisfaction of employees should be discussed immediately and resolved quickly. Peak efficiency and mutual ministry can only be accomplished in a climate of cooperation. Any employee with a work related disagreement, complaint and or dissatisfaction will be expected to bring these to the attention of the Rector. For employee grievances that cannot be resolved, the Rector may appeal to the Vestry who will investigate the situation fully using discretion, will issue a decision within 30 days of the complaint. Employees are expected to cooperate fully with any and all investigations. During this time, disciplinary or other action may be taken. The decisions arrived at must be adhered to and supported.

Dress Code

All employees must wear appropriate attire at work, which is at the sole discretion of the rector.

Housekeeping and Maintenance Concerns

Clean and well maintained buildings leave visitors and communicants with a good impression. All employees are expected to take pride in the facilities and work as a team to keep them clean. Maintenance concerns that involve Parish facilities or equipment are to be reported to the Property Committee in writing.

Telephone Use

In making and receiving telephone calls, all employees represent the Parish. The employee's voice, courtesy and readiness to handle the matter involved should reflect the nature of the call (compassion, enthusiasm, urgency, etc). Calls received are to be held confidential and should be documented by written messages, voice mail or email. Use of phones for personal calls during work hours should be limited to emergency situations. Whenever possible, personal phone calls should be made during non-working times, such as breaks and lunch periods.

Computer Use

Computers are available to assist employees in carrying out their job responsibilities. The use of computers to include email and internet services is not intended for personal use. Employees should exercise extreme care in the use of all computer programs and equipment. Only authorized software will be loaded onto Parish computers. Damage to computers must be reported immediately.

Sexual Harassment

It is the policy of the parish to promote a productive work environment free from any form of harassment. Sexual harassment consists of unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature that creates a hostile or offensive work environment. Such behavior will not be tolerated. An employee who believes that he or she has been subjected to sexual harassment is encouraged to file a complaint. If the employee believes that the Rector is the source of the harassment or has condoned it in

any way, the employee may instead contact the Vestry Wardens. All allegations of sexual harassment will be investigated promptly and confidentially. Any person who is found to be guilty of sexual harassment will be subject to disciplinary action, up to and including termination.

Dismantling Racism

Training on dismantling the institution and individual behavior of racism is required of all clergy every five years. All Vestry members are also required to take this training, as are all lay employees. A schedule is available on the Diocesan website and at the Diocesan office.

Safeguarding God's Children

The three-hour Safeguarding God's Children training is part of the effort in the Diocese of Western North Carolina to ensure that all of our parishes are safe places for children. The training is required for everyone who works with children (i.e., Sunday school teachers and youth group advisors), as well as all members of vestries or diocesan committees, commissions, agencies, or boards. These persons are to repeat the training every five years.

Job Performance

Job Descriptions

Every paid position will be provided with a job description detailing qualifications required duties and responsibilities, and reporting relationship. Every employee will be given a copy of their present job description.

Annual Reviews

The staff employee and the Rector participate in an annual job performance review no later than September of each year. Employees are eligible for salary increase consideration at this time. Generally salary increases will be effective January 1st due to the fact that the church budget operates on a calendar year. Allowable ranges for merit increases are established by the vestry at its annual compensation schedule review.

Salary Increases

Salary increases are discretionary, based on performance and value added to the ministry of the Parish. Value added is based on the employee's performance and contribution to the parish and funding level of the parish and suggests the following: the employee demonstrates a high level of the necessary and appropriate skills to perform responsibilities in an exceptional manner. Additionally, employees may be evaluated on the basis of teamwork, cooperation, ability to manage complex projects competently, and the employee's willingness to take initiative to perform duties well.

Discipline and Termination

All employees of the parish are employees at will may be terminated with or without cause (NC is a fire without cause state) and with or without advance notice. In cases of minor misconduct or performance deficiencies that appear to be correctable, employees may, at management's discretion, be given a chance to correct the behavior before being terminated.

Performance Evaluations

Employees are required to sign all performance evaluations and disciplinary notices. The employees signature denotes only that the evaluation and or notice has been seen and not that the employees agrees with it. Refusal to sign an evaluation or notice can result in discipline up to and including termination.

ACKNOWLEDGEMENT OF RECEIPT AND STATEMENT OF UNDERSTANDING

I do acknowledge that I have received a copy of the Human Resources Policy provided by the Episcopal Church of the Holy Cross. I also acknowledge that I have read and understand its contents fully.

Employee Signature

Date

Rector Signature

Date

THIS DOCUMENT DOES NOT CONSTITUTE A CONTRACT OF ANY SORT NOR DOES IT LIMIT IN ANY WAY THE EMPLOYER’S RIGHT TO TERMINATE EMPLOYMENT AT WILL. THIS HANDBOOK IS NOT AN EMPLOYMENT CONTRACT AND IS NOT INTENDED TO CREATE ANY CONTRACTUAL OBLIGATION ON THE PART OF THE PARISH. EMPLOYEES ARE EMPLOYEES AT WILL WHO MAY RESIGN AT ANY TIME FOR ANY OR NO REASON AND WHO MAY BE DISCHARGED AT ANY TIME OR ANY FOR NO REASON.

Leave Form



Name: _____

Position: _____

Type of Leave

_____ Vacation

_____ Personal/Sick

_____ Compensatory

Date to be taken: _____ Time to be taken: _____

Number of hours taken: _____ Hours remaining: _____

Reason for leave: _____

Prior approval granted: _____

Date: _____

	Hours Per Week	Vacation Days	Personal/Sick	Comp Time
Parish Administrator	20	25 days (100 hours)	N/A	If necessary
Financial Administrator	18	4 weeks (72 hours)	N/A	N/A
Organist and Choir Director	20	4 weeks, 4 Sundays (80 hours)	As necessary	N/A
Sexton	20	2 weeks (40 hours)	N/A	N/A
Sunday Sexton	Sunday morning before and after service	N/A	N/A	N/A

Parish Administrator Job Description

Title: Parish Administrator

Reports to: Rector, The Episcopal Church of the Holy Cross, Tryon, North Carolina

Hours: 20 hours a week. Schedule to be determined in collaboration with the rector.

General Description:

Under the supervision of the rector, the parish administrator provides general office support to the parish, staff, vestry, congregation and committees, in order to support the ministries and mission of Holy Cross Episcopal Church. This work includes, but is not limited to: data and records management, phone and email support, supplies and inventory management, overseeing physical plant and equipment, inventory of church goods, communications work, managing use of church space by parish and outside groups, supporting church ministries and committees and collaborating with volunteers. The Parish Administrator will be a resource person for both members and non-members, and a welcoming and responsive presence in our church's office.

Essential Duties

Information Management

1. Maintain a functional system of communication with the parish.
2. Maintain parish records, including parochial statistics, membership, diocesan, physical plant, and other operational data, keeping them current and accurate.
3. Produce reports, directories, and other documents from parish records under the direction of the rector, vestry, and committee leadership, on a timely basis.
4. Coordinate the parish calendar to facilitate building use by internal and authorized external groups.
5. Produce and distribute weekly e-news and monthly parish newsletter by email and regular mail.
6. Assist with preparing and distributing marketing materials, as directed.
7. Assist with managing the church's online presence (website and Face book pages, online advertising, etc.).

Administrative Support

1. Provide a welcoming and helpful presence in the parish office.
2. Respond to requests for information and resources via email, telephone, and in-person visits.
3. Provide administrative support to vestry or other committees, including: preparing meeting documents or posting minutes; making document copies, sending out mailings, etc.
4. Place orders for supplies and equipment as authorized.
5. Coordinate and serve as back up for the financial administrator to maintain parish financial records.
6. Coordinate with vendors as delegated by rector, wardens and property committee.
7. Communicate regularly with rector, parish sextons, and wardens about facilities-related needs, including set-up and clean-up for special events.
8. Produce rosters, correspondence, and other documents.
9. Sort incoming mail, and send parish mailing and other outgoing mail.
10. Maintain and manage parish calendar; coordinating and communicating with vestry and chairs.

11. Assist in coordination of special events.

Liturgy Support

1. Prepare and proof worship materials and bulletins for Sunday morning and other services.
2. Prepare flower donations information, and assist the chair of the altar guild and the flower guild.
3. Responsible for scheduling and posting the lay ministries schedule: acolytes, greeters, ushers, servers, LEV.
4. Provide assistance with tracking the liturgical calendar and planning for church events, as needed.

Pastoral Care

1. Maintaining prayer list.
2. Keep the rector informed of needs of the parish.
3. Communicating with the chair of In-reach concerning needs of the congregation.
4. Under the direction of rector, assist with funeral preparations.

Volunteer Support

1. Under the direction of the rector, train and schedule office volunteers
2. Organize workflow and maintain a tidy and usable office environment so as to enable effective use of volunteers.

Note: This description is not intended to include all responsibilities, as additional duties may be assigned and existing duties may be adjusted at any time.

Knowledge, Skills and Abilities:

1. Strong writing and grammar skills, including proofreading.
2. Proficiency in word processing, spreadsheet, and database applications.
3. Demonstrated organizational skills, including calendaring, project coordination, and prioritization.
4. Ability to effectively manage workload.
5. Effective communication skills, both verbal and written.
6. Ability to maintain confidentiality at all times regarding persons and information.
7. Knowledge of office etiquette and effective communications skills
8. Basic knowledge of invoice and purchase order transaction. Knowledge of supply procurement, including the ability to research vendor prices and negotiate costs.
9. Welcoming disposition, willingness to accept and serve all who come to Holy Cross.
10. Must be able to lift 20 pounds.
11. Must pass background investigation to comply with church requirements.

Qualifications

- Minimum 3 years of office experience, including communications, is required.
- Experience in a church or other ministry setting is preferred.
- Associate's degree in administration, communications, office support, or related area, is desired.

Parish Administrator Employment Agreement

Date _____ Employee Name _____

SSN _____ Full Time _____ Part Time _____ Hrs/Week _____

This position is exempt from overtime laws under State of NC and Federal Government

Vacation hours per year _____

Continuing Education Days per year _____ Education Tuition/yr \$ _____

Sick Leave or Personal Days _____

Employee is / is not eligible for Family Medical Leave

Paid Holidays at Holy Cross are as follows:

- New Year's Eve
- New Year's Day
- Martin Luther King, Jr. Birthday OR President's Day
- Easter Monday
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Thanksgiving Friday
- Christmas Day
- The first business day after Christmas Day

COMPENSATION for this position will be: \$ _____

Compensation will be reviewed again on: _____

For Employees working 20 or more hours a week:

Church Pension contributions will made by the church at 5% of employee's annual wage. If the employee contributes, the church will also match up to 4% of the annual wage.

Church Life Insurance is provided at the employee's expense. Church Health Insurance is provided at the employee's expense. Payroll deduction is available for premiums.

Receipt of compensation constitutes agreement with the above terms.

Employee signature _____ Date _____

Rector signature _____ Date _____

Financial Administrator Job Description

Title: Financial Administrator

Reports to: Rector, Holy Cross Church, Tryon, North Carolina

Hours: 18 per week

Revised: January 2015

General Description:

The Financial Administrator for the church is under the direct supervision of the church treasurer, but is hired and employed by the rector and executive committee. This position is responsible for administration of the church's financial affairs. He/she works in cooperation with other paid staff as well as the wardens, vestry and other lay leaders.

Essential Duties:

1. The Financial Administrator is responsible for the counting of weekly pledges, contributions and all other receipts. This must be done with a second person in attendance.
2. Credit all financial information to each individual's contribution records and/or proper accounts
3. Receive and record all pledge information.
4. Prepare and mail semi-annual statements to all pledging and contributing members and visitors to Holy Cross (around August 15th).
5. Provide all information requested by the internal auditor in a timely manner.
6. Prepare payroll payments on a weekly and semi-monthly and monthly basis for all employees.
7. Print and distribute all required tax forms as appropriate.
8. Prepare payments for expenses incurred by the church and charge these to the proper accounts.
9. File all paid receipts and deposit slips in an orderly fashion.
10. Track all funds and fund accounts held by the church.
11. Prepare a monthly treasurer's report for the finance committee and the vestry.
12. Work closely with the church treasurer to insure reports and transactions are accurate and properly accounted.
13. Work with the audit firm chosen by the vestry to insure that all financial services are being performed according to GAAP standards.
14. Attend finance committee and vestry meetings.
15. Remain current on all applicable software and maintain weekly backups of the data in two sets with one set kept off site in a secure and confidential manner.
16. Remain current with tax laws and other relevant topics.

Note: In addition to the above, the Financial Administrator may be asked, from time to time, to help with day to day church business and operations.

Knowledge, Skills, and Abilities:

1. The Financial Administrator must have a Bachelor's degree, preferably in business, finance or accounting.
2. Past experience should include 3-5 years work in finance, accounting, banking or other financial data related management.
3. This person must have excellent organizational and time management skills and be able to inspire trust from others in the handling of parish finances.

4. Ability to maintain confidentiality regarding all persons and information
5. Proficient in word processing, databases and spreadsheets
6. Effective communication skills both verbal and written, including email.

Work Hours and Leave:

The Finance Administrator's employment by Holy Cross Church is part time based on a work week of eighteen (18) hours, with regular office hours to be established by agreement with the rector.

The Finance Administrator will have paid holiday leave as outlined in their letter of agreement.

Compensation:

The annual performance review shall be conducted with the rector. Merit raises will be considered annually, plus adjustments in salary due to changes in the Consumer Price Index.

Reimbursement of church related mileage at the standard IRS rate.

A continuing education allowance for pertinent training as allowed by budget.

Annual Reviews:

The Financial Administrator and the rector will participate in an annual job performance review no later than September of each year. He/she is eligible for salary increase consideration at this time. Generally salary increases will be effective January 1st due to the fact that the church budget operates on a calendar year.

Allowable ranges for merit increases are established by the vestry.

Financial Administrator Employment Agreement

Date _____ Employee Name _____

SSN _____ Full Time _____ Part Time _____ Hrs/Week _____

This position is exempt from overtime laws under State of NC and Federal Government

Vacation hours per year _____

Continuing Education Days per year _____ Education Tuition/yr \$ _____

Sick Leave/Personal Days _____

Employee is / is not eligible for Family Medical Leave

Paid Holidays at Holy Cross are as follows:

- New Year's Eve
- New Year's Day
- Martin Luther King, Jr. Birthday OR Presidents Day
- Easter Monday
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Thanksgiving Friday
- Christmas Day
- The first business days after Christmas Day

COMPENSATION for this position will be: \$ _____

Compensation will be reviewed again on: _____

For Employees working 20 or more hours a week:

Church Pension contributions will made by the church at 5% of employee's annual wage. If the employee contributes, the church will also match up to 4% of the annual wage.

Church Life Insurance is provided at the employee's expense. Church Health Insurance is provided at the employee's expense. Payroll deduction is available for premiums.

Receipt of compensation constitutes agreement with the above terms.

Employee signature _____ Date _____

Rector signature _____ Date _____

Organist and Choir Director Job Description

Title: Organist and Choir Director

Reports to: The organist and choir director reports directly to the Rector of Holy Cross

Revised: January 2015

General Description: Under the direct supervision of the rector, the organist and choir director of the church of the Holy Cross is a lay minister with responsibilities for the performance and teaching of music. As music is a key component of our worship the significance of this position is vital and second only to the rector in priority. The organist and choir director is to have a working knowledge of the Episcopal Church and be a Christian leader, and minister to the choir and people of Holy Cross church. The person in this position should have a least a bachelor's degree in music and must be proficient in playing the organ and piano. In this position he/she must be flexible in order to respond to the ever changing circumstances that arise when working with volunteers. He/she must work well in cooperation with the rector and other paid staff, as well as the wardens, vestry and other lay leaders.

Essential Duties:

Music Ministry

1. The organist and choir director works in support of the whole mission and ministry of the Church of the Holy Cross through the ministry of music.
2. Selection of all music for Sunday morning church worship, with the approval of the Rector.
3. Providing organ, piano, or guest instrumental accompaniment to selected hymns, anthems and service music for Sunday worship services (times may change or vary), the Wednesday 5:30 p.m. service (as occasionally needed), and special services as scheduled by the rector (e.g. community services).
4. Recruiting and/or employing of other musicians as may be required or requested for parish services, in consultation with the rector.
5. Maintain proficiency in playing the organ and piano.
6. Providing for a substitute whenever the organist is on vacation, leave, or unable to provide music as described herein, (the church providing payment for substitutes when the organist is on scheduled personal leave or vacation and the organist providing payment for substitutes at any other time).
7. Recruiting, training, rehearsing and motivating the choir.
8. Recruiting, training and rehearsing a hand bell ensemble.
9. Planning, executing and promoting occasional concerts and evensongs.
10. Overseeing, maintaining and improving all church instruments – e.g. organ, pianos, hand bells.

Administrative Responsibilities

1. Maintaining the church music library and overseeing the purchase of new material.
2. Planning and overseeing the music budget for the church in cooperation with the rector and financial administrator;
3. Preparing an annual report concerning the music ministry for the January annual meeting of the church.
4. Attending all staff meetings, unless hindered for ministerial reasons or medical reasons.
5. Coordinating his/her ministerial activities scheduling with the Rector and the Parish Administrator.
6. Regular attendance at parish functions.

Other duties as may be needed and required by the rector or his designee

Knowledge, Skills and abilities

1. Experience in planning for and conducting choral groups and activities in the Episcopal Church.
2. Knowledge of the worship and liturgy of the Episcopal Church.
3. Experience in developing, managing, and executing a budget.
4. Effective communication skills, both written and verbal, including email.
5. Proficiency in word processing, data bases, and spreadsheets.
6. Ability to maintain confidentiality regarding persons and information.

Times of Work and Leave

1. The organist and choir director's employment by Holy Cross Church is a part-time position with the work schedule approved by the Rector;
2. The organist and choir director shall provide music for Sunday services (times may be adjusted);
3. The organist and choir director will provide music for church services associated with the liturgical calendar to include, but not limited to Christmas Eve (two services), Thanksgiving Eve, Ash Wednesday, Maundy Thursday, Easter Vigil (if scheduled) and other special occasions as may be necessary;
4. The organist and choir director shall have first refusal on all weddings conducted at Holy Cross Church with his/her minimal fee for those services, as defined by the Holy Cross Wedding Customary, to be negotiated with the bride and groom and paid directly to him/her;
5. The organist and choir director shall play for all funeral services of members conducted at Holy Cross Church wherein the family asks for music. Compensation in the amount of \$150.00 will be given by either the family or a designated church fund, as appropriate.

Compensation

The organist and choir director shall receive as compensation for his/her ministerial services an annual salary to be paid in equal, bi-monthly installments on the 15th of the month and on the last day of the month

Compensation by reimbursement, with documentation, for church related travel at the prevailing IRS mileage standard up to \$500 per year.

The organist and choir Director may submit expenses directly incurred as a necessary part of his/her ministry, prior to the event, to the Rector for consideration of reimbursement.

Other Considerations

The organist and choir director shall be provided with a rehearsal space/office suitably and appropriately equipped to exercise his/her ministry.

The organist and choir director shall be allowed the use of the musical instruments and facilities of the church for private instruction purposes at times that do not conflict with or disrupt his/her work schedule, church functions or office operations.

The organist and choir director may request secretarial assistance from the parish administrator as is reasonably necessary.

An annual ministry review for the organist and choir director shall be conducted with the rector in consultation with the executive committee at which time consideration shall be given to updating or amending this letter of agreement.

Adjustments to compensation shall be reviewed by the executive committee of the church and the rector in the light of changes in the Consumer Price Index, the performance and quality of ministry and budgetary allocations made by the vestry.

Should the organist and choir director choose to leave the position herein described, he/she will give the rector no fewer than thirty days notice.

Acknowledged _____ Date _____

Confirmed _____ Date _____

Organist and Choir Director Employment Agreement

Date _____ Employee Name _____

SSN _____ Full Time _____ Part Time _____ Hrs/Week _____

This position is exempt from overtime laws under State of NC and Federal Government

Vacation hours per year _____

Continuing Education Days per year _____ Education Tuition/yr \$ _____

Sick Leave/Personal Days _____

Employee is / is not eligible for Family Medical Leave

Paid holidays at Holy Cross are as follows:

- New Year's Eve
- New Year's Day
- Martin Luther King, Jr. Birthday OR Presidents Day
- Easter Monday
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Thanksgiving Friday
- Christmas Day
- The first business day after Christmas Day

COMPENSATION for this position will be: \$ _____

Compensation will be reviewed again on _____

For Employees working 20 or more hours a week:

Church Pension contributions will made by the church at 5% of employee's annual wage. If the employee contributes, the church will also match up to 4% of the annual wage.

Church Life Insurance is provided at the employee's expense. Church Health Insurance is provided at the employee's expense. Payroll deduction is available for premiums.

Receipt of compensation constitutes agreement with the above terms.

Employee signature _____ Date _____

Rector signature _____ Date _____

Sexton Job Description

Position: Sexton

Introduction

The Sexton for the church is under the direct supervision of the Parish Administrator, but is hired and employed by the rector. The person in this position must be flexible in order to respond to the ever-changing circumstances that arise when working with a church organization. This includes being flexible with scheduled times to meet church needs. He/she works in cooperation with other paid staff as well as the wardens, vestry, other lay leaders and non-church members who rent or use Holy Cross facilities.

Qualifications/Experience

The Sexton must be a graduate from high school or its equivalent as reading, writing and math skills are very important. Three to five years of experience in cleaning and maintaining commercial, governmental or non-profit organization properties is desirable. He/she must maintain a positive work attitude, especially around the various types of people in and out of a church setting. The Sexton is on the staff of Holy Cross and must work well as a team member. .

Duties and Responsibilities

The Sexton is responsible for the following:

- Perform all general custodial duties as outlined below
- Run errands as needed
- Report areas in need of large-scale maintenance or repairs
- Keep Boiler Room clean and well-organized
- Track janitorial supply usage and inform Parish Administrator when time to reorder

Daily (or as needed) Tasks

- Check all areas for spot messiness or heel marks, spills; clean as needed
- Check all bathrooms. Clean, mop and replenish supplies as needed
- Empty all trash cans and place trash in dumpster; reline trash cans (*Finance office must be done when Administrator is in the office*)
- Remove any debris from sidewalks and lawns around church
- Retrieve mail from street-side mailbox
- Thoroughly clean offices,(except for the Finance Office which is restricted)
- Thoroughly clean and dust chapel and sacristy
- Clean and mop halls and stairways/rails and elevator

Weekly Tasks

- Re-set rooms including the Parish Hall, that were used over the weekend or after an event
- On Wednesday morning, put recycle items in box on curb for pick-up. Retrieve box after pick-up.
- In the sanctuary, pick up programs, lost and found items (*turn in to office*), clean floors and dust and vacuum pews and windows
- Mop kitchen floor Mondays after the Sunday coffee hour

Bi-weekly

- Clean meeting rooms, including vacuuming and damp mopping floors and dusting all furniture and window sills
- Clean, mop or vacuum and dust choir room and common room
- Clean, mop or vacuum and dust men's and women's robing rooms
- Sweep parish hall, mop kitchen, morning after monthly Wednesday night dinners or other church events/

Seasonal Duties

- Clean all windows from the inside
- Shovel sidewalks, apply Ice-Melt product when indicated

Special jobs by separate contract

- Clean all carpets as needed

Occasional responsibilities

- Assist church members and staff with hanging drapes, hanging pictures, moving furnishings, setting up rooms for meetings as needed
- Prepare sites for interment in the Memorial Garden
- Be available to open and close the church when there is a wedding or special church event. Families will pay the Sexton directly in these cases.
- Work hours related to the preparation and clean-up for weddings, and non-parish groups or events will be paid directly to the Sexton by the family or group. Payment for wedding assistance is \$40/hour for the first hour and \$20/hour thereafter paid to the sexton directly by the family.

Annual Review

The Rector will conduct an annual job performance review no later than September of each year. Allowable ranges for merit increases are established by the vestry at its annual compensation schedule review, plus adjustments in salary due to changes in the Consumer Price Index.

Sexton Employment Agreement

Date _____ Employee Name _____

SSN _____ Full Time _____ Part Time _____ Hrs/Week _____

This position is exempt from overtime laws under State of NC and Federal Government

Vacation hours per year _____

Continuing Education Days per year _____ Education Tuition/yr \$ _____

Sick Leave _____

Employee is / is not eligible for Family Medical Leave

Paid Holidays at Holy Cross are as follows:

- New Year's Eve
- New Year's Day
- Martin Luther King, Jr. Birthday OR Presidents Day
- Easter Monday
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Thanksgiving Friday
- Christmas Day
- The first business days after Christmas Day

COMPENSATION for this position will be: \$ _____

Compensation will be reviewed again on: _____

For Employees working 20 or more hours a week:

Church Pension contributions will made by the church at 5% of employee's annual wage. If the employee contributes, the church will also match up to 4% of the annual wage.

Church Life Insurance is provided at the employee's expense. Church Health Insurance is provided at the employee's expense. Payroll deduction is available for premiums.

Receipt of compensation constitutes agreement with the above terms.

Employee signature _____ Date _____

Rector signature _____ Date _____

Sunday Sexton Job Description

Position: Sunday Sexton

Introduction

The Sexton is hired and employed at the pleasure of the Rector. The person in this position works in cooperation with other paid staff as well as the wardens, vestry, other lay leaders and.

Duties and Responsibilities

The Sunday Sexton is responsible for the following:

- Open the building Sunday morning
- Inspect the premises for leaks, break-ins, etc.
- Turn on the lights
- Check restrooms for supplies
- Set up coffee hour, including making coffee
- Keeps inventory and purchases coffee hour supplies
- Ring church bell before services
- Assists coffee hour host
- After the service removes papers from the pews, straighten prayer books and hymnals
- Turn off all lights
- Takes out trash
- Locks all doors

Annual Review

The Rector will conduct an annual job performance review no later than September of each year.

Policy Regarding Mutual Ministry Reviews (“MMR’s”)

in the Diocese of Western North Carolina

adopted by the Bishop on February 16, 2015

Introduction

We live in changing times that call us to reinvision the Church and to engage everyone (lay and ordained) in building its future. In order to establish and maintaining healthy parishes, parish leadership are required to engage in the hard work of honestly assessing how the parish is accomplishing its ministries and fulfilling its mission. A Mutual Ministry Review (“MMR”) provides the rector and vestry with an intentional way of reviewing and strengthening

- the parish’s sense of mission and its general vitality,
- how the vestry and rector fulfill their roles as leaders of the parish, and
- the relationship between the vestry and the rector.

Having these positive and honest conversations within a vestry or between a vestry and rector can prevent minor problems or conflicts from escalating. MMR’s serve as the best process for facilitating such conversations.

This policy applies to all parishes and all clergy in charge of parishes, however named. For simplicity, all such clergy are referred to in this policy as “rector.”

Purpose of this Policy

Since at least September 18, 2004 (when Bishop Taylor was consecrated) almost every Letter of Agreement for clergy in charge of a parish has contained this or similar language:

The Rector, Wardens and Vestry agree to an annual discussion and mutual review of the total ministry of the parish, in order to:

- Provide the Rector, Wardens and Vestry opportunity to assess how well they are fulfilling their responsibilities to each other and to the ministries they share;
- Establish goals for the work of the parish for the coming year;
- Isolate areas of conflict or disappointment which have not received adequate attention and may be affecting mutual ministry adversely;
- Clarify expectations of all parties to help put any future conflicts in manageable form.

A mutually agreed upon third party may be engaged to facilitate the mutual ministry review process.

Admittedly, the Diocese has not followed up on that requirement or, more importantly, provided the consistent support needed for all of our parishes to conduct an MMR. We want to change both of those omissions.

This policy establishes the expectation that all parishes will complete mutual ministry reviews and outlines the processes for doing so. The language in future Letters of Agreement will be altered to conform to this policy.

What Is a Mutual Ministry Review?

First, let's address what a mutual ministry review is not. An MMR is not a performance review of the rector. Many clergy have been suspicious, and rightfully so, of processes that have turned into a single-minded opportunity to criticize the priest. The process we use will be a positive, cooperative conversation assessing all areas of ministry in the parish, not just the rector's. Maintaining the integrity of this process is an important reason we require the use of a trained facilitator who is not from the parish.

An MMR is also not a way to resolve significant conflicts. Serious conflict will make it difficult to have the positive, objective conversations we seek. Parishes experiencing significant conflict should contact the Bishop's office and will be referred to other resources. Where appropriate, the Bishop will excuse such parishes from the requirement to conduct an MMR until the conflict is resolved.

A mutual ministry review is a way for a parish to ask, "How are we doing?" The MMR offers an opportunity to celebrate what a parish does well and to identify opportunities for improvement.

It invites a conversation as to what God may be calling a parish to do and accomplish at the present time in its life. The process can provide moments of grace through the recognition that none of us is perfect and that we need one another in order to serve Christ in our often-confusing contexts. A mutual ministry review assesses:

- the health of the parish,
- the effectiveness of parish leadership,
- the relationship of the vestry with the rector and staff, and
- fulfillment of the parish mission and goals.

After the completion of a mutual ministry review, the vestry should use the feedback generated to build on parish strengths, consider recommendations for new goals, and implement improvements to existing ministries. This will not be "another study sitting on the shelf." The vestry will generate goals and tasks which will be reviewed at future vestry meetings according to a timeframe for accomplishment.

The Mutual Ministry Review Process

To assist parishes in completing a mutual ministry process, the Diocese of Western North Carolina has approved a facilitated mutual ministry process. A summary of the steps involved is attached. A list of approved facilitators and a schedule of fees is posted on the diocesan website (www.diocesewnc.org). Parishes that are unable to afford the costs should discuss their situation with the Bishop.

The Vestry is encouraged to inform the parish an MMR has been completed and, as it discerns appropriate, to summarize significant feedback and planned goals or actions resulting from the feedback. Except for what is officially released by the Vestry, Vestry members are expected to honor the confidentiality of the MMR report and comments of individual members.

Parishes may elect to utilize an MMR process other than that approved by the Diocese with the Bishop's prior permission. When applying for permission, the parish should submit a description of the proposed process and explain who will facilitate it.

When Are Mutual Ministry Reviews to Be Completed?

New Calls: It is suggested that the MMR occur around the first anniversary of the priest's arrival, but it must be completed within 15 months of that date. Parishes that have called a rector (or priest-in-charge, or pastor-in-charge) within 15 months and have not conducted an MMR should schedule one as soon as possible. When the MMR is completed, or if the parish has already completed an MMR, the senior warden or rector will notify the

Canon to the Ordinary (in writing, preferably by email at jimpritchett1@icloud.com) and provide the completion date and the name of the person facilitating the process. Feedback which might be helpful to the Diocese or facilitator will be welcomed.

Clergy called on or before 15 months before the date of this policy: Parishes having called a rector before November 16, 2013 should complete a mutual ministry review not later than February 16, 2018 (which is two years after the date of this policy). Parishes are encouraged not to procrastinate; resources might be scarce near the deadline, and the sooner the parish avails itself of the benefits of an MMR the better. The senior warden or rector will notify the Canon to the Ordinary (in writing, preferably by email at jimpritchett1@icloud.com) when the MMR has been completed and will provide the completion date and the name of the person facilitating the process. Feedback which might be helpful to the Diocese or facilitator will be welcomed.

Future Mutual Ministry Reviews: After a parish has completed a mutual ministry review, the parish is encouraged to repeat the process approximately every three years, and is required to do so every four years. A vestry may, of course, elect to complete another mutual ministry review sooner. Specific factors which might influence such a decision include:

- when a previous MMR has identified significant new goals or needed improvements,
- prior to a rector's sabbatical,
- when entering a capital campaign, or
- at other significant times of transition in the life of the parish.

Conclusion: We Need Your Help

As chief priest and pastor of the Diocese, the Bishop cares deeply that all of our parishes are as fully vibrant and engaged ambassadors of Christ as possible. To that end, the Bishop asks for the cooperation of everyone in the Diocese, lay or ordained, in the implementation of this policy. This is not an effort to add a bureaucratic requirement to your already busy lives; it is an effort to help your parish improve communication, head-off conflict, celebrate what you do well, and make changes needed to serve our Lord even better. Although this process has been used successfully in many parishes, if we discover that part of it does not work well, we will change it. The Bishop hopes that both the laity and clergy will view the chance to engage in a mutual ministry review as an exciting ministry opportunity afforded to you by your brothers and sisters in Christ, your Diocese. And thank you for all you do!

Summary of a Facilitated Mutual Ministry Review (MMR) Process

Selection of the Mutual Ministry Facilitator

Vestry secures names of diocesan trained facilitators and selects the facilitator.

Vestry orientation

The facilitator offers a (approximately 1 - 1.5 hours) Vestry presentation and discussion, explaining what an MMR is, the advantages of completing an MMR, presents the survey to be used in completing the MMR, the process for analyzing data collected, and process of presenting the MMR report and discussion.

Collection and analysis of data

The parish provides the facilitator the past 5 years parish average Sunday attendance and pledge income data. All Vestry members and Rector complete (typically within 2 weeks after the Vestry MMR orientation) and email to the facilitator the MMR survey, which asks questions about areas of parish life and the strengths and opportunities for improvement for each area, how the Vestry fulfills its responsibilities, and how the Rector performs his/her duties.

The facilitator aggregates the MMR survey responses and analyzes the parish data and survey responses and prepares an MMR report that notes parish strengths, opportunities for improvement, suggested areas for discussion, and as appropriate offers recommendations.

MMR Report Presentation

The facilitator (typically 3-5 days before being presented to the Vestry) emails a copy of the MMR report to the Senior Warden and Rector and requests copies be emailed to Vestry members 1-2 days before the Vestry presentation.

Approximately 30 days after the Vestry orientation, the facilitator presents a summary of the MMR report and facilitates a discussion of the report, conclusions and recommendations and encourages Vestry actions as a result of the report. The presentation and discussion typically last 1 – 1.5 hours.

Planning for the Future

At a Vestry retreat or future Vestry meetings, the MMR report strengths, opportunities for improvement and recommendations are discussed in more detail and action plans developed. If this occurs at a Vestry retreat, at its discretion may or may not have a facilitator, who does not have to be, but may be, the MMR facilitator. If the MMR process identifies areas that will result in significant changes in written job descriptions or written performance outcomes for improvement, it is recommended that the Wardens and Rector include the MMR facilitator in negotiating these documents.