PERSONNEL HANDBOOK

WELCOME TO THE PRESBYTERY OF CHARLOTTE

You have joined an organization and a staff that care about you and your job satisfaction during your employment with the Presbytery of Charlotte.

We want members of The Presbytery of Charlotte's staff to enjoy their work. We are dedicated to maintaining a pleasant atmosphere for our work and expect a reciprocal commitment from you as you become one of us.

As we continue to progress in the mission of the Presbyterian Church (U.S.A.) and in the shared vision of our Presbytery (JOINING JESUS THE RISEN CHRIST IN BUILDING, CELEBRATING, AND ANTICIPATING THE KINGDOM OF GOD IN OUR SEVEN COUNTIES AND BEYOND) it is our desire that The Presbytery of Charlotte's staff also enjoy a sense of growth and progress. You, as a member of staff, are an important person to us, and it is possible to progress only with your efficient and loyal service.

This Personnel Handbook has been prepared to acquaint you with your benefits and responsibilities as an employee of the Presbytery of Charlotte. Welcome into our midst, and we look forward to a long and pleasant relationship.

Approved Presbytery of Charlotte Council: _____

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Employee Acknowledgement

Regarding my employment at the Presbytery of Charlotte, I understand the following:

- Neither this handbook nor any other Presbytery of Charlotte publication is a contract of employment. Nothing in this handbook should be taken as a promise of employment for any definite period of time. Employment of Called and Installed staff (General Presbyter and Associate General Presbyter) are based on their terms of call.

- The Personnel Handbook provides information about Presbytery of Charlotte's policies, practices, procedures, benefits, and programs, and it overrides and replaces all past handbooks, guides, manuals, and policies. However, the policies, practices, procedures, benefits, and programs set forth in this handbook may be changed at any time by the Presbytery of Charlotte. The information contained in this Personnel Handbook does not replace or change the meaning of the Presbytery of Charlotte's employer-sponsored benefits plan documents. If the descriptions in the Personnel Handbook conflict with plan documents, the plan documents will supersede the description set forth in the Personnel Handbook.

- It is my responsibility to read and be familiar with the information contained in the Personnel Handbook as well as any revisions to handbook information. The Personnel Handbook does not cover all the terms and conditions of my employment with the Presbytery of Charlotte, nor is it intended to answer every question I might have about my employment. I am aware that I should contact my supervisor or Personnel Representative with questions about my employment or about this handbook.

I have read and understand the information above and acknowledge access to the Presbytery of Charlotte's Personnel Handbook.

Employee Signature:_____

Employee Name (Printed):_____

Date:_____

Organization Statement

The Presbytery of Charlotte strives to provide all employees with rewarding employment opportunities. The Personnel Handbook provides important information regarding the organization's policies, guidelines, benefits, procedures, and important responsibilities which you are expected to meet as an employee of the Presbytery of Charlotte.

Much of the information contained in the Personnel Handbook is summarized and is not intended to be a complete or detailed statement of all our policies, guidelines, benefits, and procedures. You should seek clarification from your supervisor or Personnel Representative, for any questions you might have. In addition, we are in a very dynamic environment, which demands of us the ability and willingness to demonstrate flexibility and to quickly embrace changes. For that reason, changes in the way we function can and will be made from time to time, occasionally without prior notice. Also, exceptions may be made based upon the facts and circumstances of individual situations.

Within this Personnel Handbook, the responsibility of Personnel Representative typically refers to the General Presbyter, unless otherwise indicated.

Employment Statement

The statements and contents of this handbook and of other Presbytery of Charlotte's manuals or publications are not promises of any kind, and the Presbytery of Charlotte reserves the right to change any term or condition of employment with any employee without any prior consultation or agreement with any employee. This handbook cancels and supersedes any other statement whether spoken or written concerning the terms and conditions of employment by the Presbytery of Charlotte. The Terms of Call govern the employment of any Called and Installed staff.

Equal Employment Opportunity

It is the policy of the Presbytery of Charlotte to engage in employment policies and practices which promote equality of opportunity in all aspects of employment. The Presbytery of Charlotte shall be guided by the *Book of Order,* the policies of the General Assembly, the Churchwide Equal Employment Opportunity and Affirmative Action Plan of the Presbyterian Church (USA), the policies of the Committee on Ministry, and the applicable federal and state laws, regulations, and executive orders related to equal opportunity employment.

All employment policies and practices including recruiting, selection, benefits, compensation, performance appraisal, promotion, transfers, discipline, training, and separation shall be administered without discrimination based on race, color, national origin, gender, gender identification, age, marital status, sexual orientation, creed, disability, religious affiliation, or any other factor prohibited by applicable state or federal law (except where a category is determined to be a bona fide occupational qualification). It is the policy of the employer to act affirmatively to expand employment opportunities which contribute to a diverse workforce.

We are dedicated to fulfilling our equal employment opportunity policy in recruiting, interviewing, selection, placement, transfer, job elimination, reduction in force, termination, advertising, compensation, selection for training, and other terms and conditions of employment. However, an employee's success at the Presbytery of Charlotte is based on job performance, knowledge, skills, and abilities.

Reasonable Accommodation

The Presbytery of Charlotte is committed to equal opportunity for all persons including those with disabilities in all aspects of employment including hiring, placement, promotion, transfer, demotion, layoff, termination, recruitment, advertising, compensation, selection for training, and any other terms and conditions of employment.

The Presbytery of Charlotte will provide reasonable accommodation to eligible disabled individuals which might include:

- Reasonable changes in work schedule
- Modification of job structure
- Removal of architectural barriers

The Administration Committee will be responsible for reviewing all requests for reasonable accommodation, including approving the request, modifying the request, or denying the request.

Roles and Responsibilities

These personnel policies are based on commitments by the Presbytery of Charlotte and its staff:

- The Presbytery of Charlotte shall endeavor to recognize, utilize, and affirm the full potential of each employee.
- Employees shall devote their interests and energy to their work and the goals of the Presbytery of Charlotte.

The Presbytery of Charlotte's Responsibilities

The Presbytery of Charlotte recognizes the following responsibilities to its employees:

- to be faithful to the purpose of the organization as found in the first three chapters of the *Book of Order, Presbyterian Church (USA);*
- to be faithful to the Shared Vision for the Presbytery of Charlotte adopted in 2017
- to provide equal opportunity in all aspects of every phase of the personnel system;
- to conduct performance evaluations for all employees that relate to their work objectives and to the objectives of the Presbytery of Charlotte. These evaluations shall give employees an opportunity to participate in evaluating their own performance;
- to establish and maintain open communication;
- to establish and administer a process that provides for the hearing and resolution of complaints and grievances;
- to make every reasonable effort to provide a workplace that is safe and secure.

Employee Responsibilities

Employees of the Presbytery of Charlotte recognize the following responsibilities:

- to understand and fulfill their assigned role and function in the context of the goals of the Presbytery of Charlotte;
- to contribute to the effective development and performance of the staff team;
- to act in accordance with the Presbytery of Charlotte's rules and regulations.

Common Responsibilities

The Presbytery of Charlotte and its employees are responsible to one another for the development and implementation of a team model that reflects the goals of the Shared Vision.

The Administration Committee

The role of the Administration Committee is to actively facilitate and nurture the relationship between the Presbytery of Charlotte and its staff, and relationships among the Presbytery of Charlotte staff.

Employment Practices

The Presbytery of Charlotte is committed to full compliance with the federal immigration laws and will not knowingly hire anyone who does not have the legal right to work in the United States.

Ministers of the Word and Sacrament

The nature of the relationship between persons ordained to the Ministry of Word and Sacrament and the Presbytery of Charlotte is governed by the *Book of Order.* They are covered by all personnel polices except where superseded by federal, state or local laws, or otherwise noted in these personnel policies.

Independent Contractors

The Presbytery of Charlotte may contract with a person with specific skills for a time-defined task. If certain tests established by the Internal Revenue Service are met, this person may perform work as an independent contractor. Independent contractors are not employees, cannot be paid through the payroll system, and are not eligible for any benefits available to employees. Independent contractors are required to disclose any conflict of interest before works begins. Current employees are not eligible to contract with the Presbytery of Charlotte as independent contractors, nor or they eligible to be employed by an independent contractor contracting with the Presbytery of Charlotte.

Volunteers

It is the policy of the Presbytery of Charlotte to provide opportunities for persons to serve the church on a non-compensated basis. Persons who help out on an occasional or a regular basis without compensation are considered volunteers. These persons are not filling employee roles and are not eligible for any of the benefits of regular or interim employees.

Volunteers must provide basic identification data before they begin work. Volunteers are required to provide additional information as required by the Presbytery of Charlotte's polices and/or law. Record of Volunteer information will be recorded on a Volunteer Information Form and maintained by the Stated Clerk in the files of the Presbytery of Charlotte.

Volunteers may be eligible for reimbursement of expenses such as conference registration, travel, and lodging when those expenses are incurred at the direction of or with the approval of the Presbytery. To qualify for reimbursement, the volunteer will need to complete the Pre-Authorization Form for Reimbursement of Volunteers with Major or Conference Travel Expenses.

Employment of Minors

If an employee is not at least eighteen (18) years old, s/he is required by law to provide a valid Youth Employment Certificate from the NC Department of Labor. The employment of minors is restricted by the terms and conditions of the Youth Employment Certificate, as well as the provisions of state and federal law.

Confidentiality of Staff Records

It is the policy of the Presbytery of Charlotte to respect the privacy of employees as much as possible while accomplishing its mission.

Employee Access to Personnel Records

An employee may request access to her/his personnel file through the Personnel Representative. The authorized Personnel Representative or their designee must be present during the review. No employee may remove or alter anything in her/his file. The employee may request photocopies of the documents which will be provided to them within a reasonable period of time. The employee may request a correction in writing through the Personnel Representative, who will inform the employee of the disposition of the request.

External Access to Records

All inquiries pertaining to current or former employees should be referred to the Personnel Representative. Upon receiving verification requests, the Presbytery of Charlotte will give **only** the following information unless the employee gives specific authorization to release additional information: Name, job title, and dates of employment. Inquiries regarding salary information and requests for any other specific information require specific written authorization from the employee (current or former) defining what information may be released and to whom. This includes requests for information for obtaining mortgages, credit cards, and opening charge accounts. However, information pertaining to a current or former employee's performance and/or termination will not be provided unless required by Federal, State, or local law. All inquiries pertaining to current or former employees should be referred to the Personnel Representative.

Recruitment and Selection

It is the policy of the Presbytery of Charlotte to employ qualified individuals who can contribute to the mission, goals, and ministry of the organization.

Hiring from Within

Supervisors are encouraged to consider qualified current employees for promotional and career development opportunities. In all instances, selections shall be made in accordance with the equal employment opportunity policy.

Interim Employees

Interim employees may apply for and be considered for filling the position on a regular basis.

Job Posting

All job opportunities shall be posted internally before external recruiting begins. Internal posting may be accomplished by posting notices of exempt and non-exempt vacancies locally for at least one week or five business days. Internal candidates need not be interviewed before external posting begins. Postings for exempt positions may be mailed to the appropriate bodies simultaneously with church wide advertising.

Employees should have been in their current position for one year and have a satisfactory performance level before applying for a new opportunity. The Personnel Representative has the discretion to waive these requirements if business needs dictate.

The Personnel Representative and/or their designee has the responsibility to determine if internal candidates who apply for a different position meet the necessary qualifications before scheduling interviews. Employees have the right to expect timely response to their expressed interest as well as timely conclusions to their application for an open position.

The standard timeframe for release of an employee to a new job should not exceed three weeks unless there is a pressing business need. In this case, the hiring and outgoing department managers will confer and determine an effective date for the transfer.

Advertising

Advertising placed for vacant positions must be non-discriminatory and should indicate “equal opportunity employer”. Advertisement of vacancies may be included in appropriate publications of the Presbyterian Church (USA).

Performance Management

Annual Performance Review

It is the intent of the Presbytery of Charlotte to conduct performance reviews/evaluations of all staff annually. Reviews of all staff except the Executive Staff (General Presbyter and Associate General Presbyter as those positions are occupied) are the responsibility of the Personnel Representative or their designee. Performance reviews of the General Presbyter and Associate General Presbyter are the responsibility of the Administration Committee.

Documentation and Acknowledgment

Evaluations should be conducted honestly and fairly and reflect the collaborative nature of the work environment. The evaluation must be documented in writing using the EMPLOYEE ANNUAL SELF-REVIEW AND CAREER PLANNING FORM attached to the end of this handbook and signed by the reviewer. The employee should acknowledge the review with a signature and may add written comments. Evaluations may include commendation for good work, as well as specific recommendations for improvement.

Evaluations shall become a part of the employee's personnel records and are confidential information. The employee may file a written disagreement about any point in the evaluation. Such documents shall be made part of the employee's personnel record.

Performance Counseling

It is the policy of the Presbytery of Charlotte to maintain standards of employee performance, attendance, and conduct which allows the Presbytery of Charlotte to fulfill its mission. The goal of performance counseling is to assist an employee to achieve an optimal level of performance, attendance, and conduct. The Presbytery of Charlotte has the right to determine the level of disciplinary action it deems suitable when addressing inappropriate, unethical, or illegal behavior. When discussions between an employee and her/his supervisor do not result in improved performance, the use of a formal counseling process is advantageous for all parties involved. This process helps underscore the seriousness of the need for immediate improvement and provides the employee an opportunity to improve.

The counseling process is a formal two-step process intended to correct performance, behavioral, or attendance deficiencies that have not improved as a result of routine supervisory discussions or feedback. The two formal steps are: 1) written warning, and 2) final notice. Performance counseling uses the PROGRESSIVE DISCIPLINE FORM attached to the end of this Handbook.

If an employee's performance, attendance, or behavior is unsatisfactory and the process for counseling for improved performance is implemented, the employee will be informed of what is deemed unsatisfactory and given the opportunity to discuss it with her/his supervisor. The employee and supervisor will agree on a written action plan to improve performance, including specific actions by the employee and a timeframe for completion or expected improvement, and consequences for failing to improve. The employee should receive a copy of this documentation and acknowledge notification with a signature. All documentation will be placed in the employee's personnel file.

Under normal circumstances, the written warning serves as the first formal notice of the need to improve performance. If performance is not improved, a final notice will be discussed with the employee. In the absence of improved performance, corrective action will be taken up to and including termination of employment.

Sometimes the severity of the problem merits the implementation of final notice as a first formal step. There are also certain problems (e.g., employee dishonesty, violation of organizational policy, theft, irreparable loss of confidence, etc) that can be cause for immediate dismissal. Recurrence of the problem may also result in going directly to final notice.

The Presbytery of Charlotte may, in its sole discretion, terminate any employee without having implemented the procedures described above. See Employment Statement above.

Employee Development

It is the policy of the Presbytery of Charlotte to encourage and support employee development through training, continuing education, and professional development programs. These programs afford employees the opportunity acquire new skills and knowledge and to refresh current skills consistent with the needs of the Presbytery of Charlotte.

Funding

The types and amounts of funds available for employee development shall be established by the Administration Committee, and discussed with employees during their annual reviews.

Career Goals and Development Plans

The annual performance review is an opportunity for the employee and the supervisor to discuss the employee's career goals and the Presbytery of Charlotte's expectations.

Compensation

It is the policy of the Presbytery of Charlotte to provide a salary administration program which includes fair pay for work performed, incentive for personal achievement and growth, and flexibility to meet changes in organization, functions, and personnel over time.

Workweek

The standard workweek for employees at the Presbytery of Charlotte is 7.5 hours per day, Monday through Thursday and from 9:00 a.m. to Noon on Friday, for a total of 33 hours per week. The workweek begins on Monday at 12:01am and ends at midnight on the following Sunday. Remote working opportunities will be considered and managed by the Personnel Representative and/or the Administration Committee.

Scheduled Pay Days

Employees receive pay semi-monthly on the 8th day and 22nd days of the month. If the regularly scheduled pay date is a holiday, the pay day will be the business day immediately preceding the pay date.

Paychecks

Payment of wages is made by direct bank deposit.

The Presbytery of Charlotte does not cash paychecks and does not provide salary advances. Required deductions include federal income taxes, state and local income taxes where applicable, FICA (social security), garnishments and/or tax levies when required. Voluntary deductions may also be included based on the employee's participation in benefits programs (such as medical insurance).

Garnishments

The Presbytery of Charlotte must accept garnishments, wage assignments, and IRS levies. The Presbytery of Charlotte will make the calculation and make payment to the respective court or, in case of tax levy, to the state taxing authority or the IRS. The employee will be notified if and when a garnishment, wage assignment, or tax levy has been received.

Employees are not subject to disciplinary action because of garnishments, wage assignments, or IRS levies.

Overtime

Employees classified as "exempt" from requirements established by the North Carolina Wage and Hour Act do not qualify for overtime pay. Employees classified as "non-exempt" do qualify to receive overtime pay.

For non-exempt employees, hours worked in excess of 40 hours during the workweek are considered overtime and will be paid at the rate of one and one-half times their hourly rate of pay.

Vacation time and holiday time that is paid, but not actually worked, does not count toward the calculation of overtime.

Holidays

Hours worked on a designated holiday are paid at the employee's regular rate of pay.

Benefits

Benefit Plans and Eligibility
It is the intent of the Presbytery of Charlotte to provide a fair, competitive benefit program to attract and retain qualified employees. The Presbytery of Charlotte is responsible for maintaining benefit plans through the Board of Pensions of The Presbyterian Church (USA) and other providers appropriate to its needs and for communicating the details of these plans to its employees. Independent contractors are not eligible for benefits.

Worker's Compensation Insurance
All employees are automatically covered by Worker's Compensation Insurance beginning on the date of hire.

Social Security
The Presbytery of Charlotte shall deduct a portion of Social Security tax from an employee's salary. The amount deducted and an equal amount paid by the Presbytery of Charlotte shall then be sent regularly for credit to the employee's account with the federal government. Ordained persons receive Social Security allowances as defined in their terms of call.

Pension Plan
All full-time employees are eligible to be enrolled in the Board of Pensions of the Presbyterian Church (USA). The Board of Pensions plan includes Pension as well as Life and Disability Insurance programs. Dues are paid by the Presbytery of Charlotte at 100%. Part-time employees (working more than 20 hours per week but less than 30 hours) are not eligible for the Pension plan but are enrolled in the Medical Plan of the Board of Pensions.

Medical Insurance
After completing three (3) months of employment, all full-time employees and part-time employees working more than 20 hours per week are eligible to be enrolled in the medical insurance plan administered by the Presbyterian Church (USA).

The Presbytery of Charlotte pays all premiums associated with coverage under this plan. An employee who wishes to secure additional coverage for other members of his/her family may do so by paying the additional premium amount to the Presbytery of Charlotte. For additional information about the medical plan, employees should talk with the Comptroller/Treasurer who functions as the Benefits Administrator.

Medical Reimbursement Plan
Upon participation in the Medical Plan of the Board of Pensions of the Presbyterian Church (USA), an employee also becomes eligible for the "Presbytery of Charlotte, Presbyterian Church (U.S.A.) Restated and Amended Medical Reimbursement Plan"

Credited Service
It is the policy of the Presbytery of Charlotte to credit years of service as an employee works toward certain benefits eligibility. Credited service includes all full-time and (pro-rated) part-time service on the staff of the Presbytery of Charlotte. Total credited service is defined as the sum of all regular full-time service and pro-rated part-time service. Total credited service is used to determine the amount of vacation leave which the employee may receive.

A break in credited service is defined as a period of time during which the employee did not appear on the payroll of the Presbytery of Charlotte. If this period is 12 months or less, service shall be considered continuous.

Leave without pay shall not be counted toward credited services.

Paid Time Off

Holidays

The Presbytery of Charlotte provides approximately ten (10) paid holidays each year. Holidays may vary from year to year depending on the calendar. The holiday schedule will be determined and announced by the Personnel Representative by the end of the year for the upcoming calendar year.

Employees on Leave of Absence

Employees on leave of absence are not eligible for holiday pay on holidays that are observed during the period that they are on leave.

Part-time Employees

Part-time employees are eligible for holiday pay only when the holiday falls on their regularly scheduled work day. Eligible holiday pay is pro-rated based on hours normally worked.

Vacation

Vacation leave is available to all full-time and part-time employees. Paid vacation for part-time employees is pro-rated on the percentage of time worked. Volunteers and independent contractors are not eligible for paid vacation. Vacation leave does not accumulate from one calendar year to the next. Any vacation for the year that is not used by the end of the year is forfeited.

Scheduling

Vacation schedules shall be coordinated with the staff through the supervisor or Personnel Representative.

Non-Clergy Employees

Non-clergy employees receive annual paid vacation leave based on their credited service with the Presbytery of Charlotte. After the first year of employment, vacation shall be based on the calendar year beginning January 1st of each year. Vacation is earned as follows:

- Less than one year of service — 10 days, prorated based on number of months worked since January 1st
- Up to 5 years of service — 10 days per year
- 5 years to 10 years of service — 15 days per year
- 10 years to 25 years of service — 20 days per year
- 25 or more years of service — 25 days per year

Clergy Employees

Vacation is earned based on terms of call.

On Termination of Service (whether voluntary or involuntary)

A terminated employee shall be paid for all unused vacation time. The ending balance will be pro-rated based on time worked during the current/last calendar year.

Personal Privilege Days

After completion of one (1) year of service, the full time employee shall be allowed one paid "personal privilege" day every six (6) months to be used at the employee's discretion and in coordination with the employee's supervisor. This day shall not be counted against the employee's vacation leave, compensatory time, or medical leave, nor can it be carried over to the next six-month period.

Compensatory Time

Employees may receive compensatory time for days worked outside of their normal work week (for example, working during Presbytery meetings on Saturdays). Compensatory time off may not be used to evade or substitute for earned overtime payments.

Study Leave

Clergy employees may take up to two weeks of study leave per year with pay for continuing education, unless otherwise stated in their terms of call or terms of employment. Non-clergy employees may take up to one week of study leave per year with pay for continuing education. Study leave plans must be approved by the Administration Committee.

Study leave and study leave allowance may be accumulated for up to six (6) weeks with the approval of the Administration Committee.

Sabbatical Leave

Clergy staff may be permitted a sabbatical leave after seven (7) years of employment and every seven (7) years after a sabbatical is taken. Three (3) months time with full pay shall be provided. A maximum of six (6) additional months may be taken without pay.

The clergy employee shall return to work at the end of the sabbatical period for at least twelve (12) full months before accepting employment elsewhere. If the clergy member accepts another call while on sabbatical leave, or prior to fulfilling the obligation of working twelve months after their sabbatical leave, the clergy employee shall reimburse the Presbytery of Charlotte for their salary paid while on sabbatical.

Notice of intent to apply for a sabbatical leave, with expected time requested, is to be given no less than six (6) months prior to the beginning of the leave to the Administration Committee. Only one staff person may be on sabbatical at any one time.

Sick Leave

Sick leave is intended for use for personal illness of the employee or immediate family member. Immediate family is defined as parent, sibling, spouse, or child related by blood or marriage or a person whose relationship is similar to those relationships that are by blood or marriage. Sick leave is earned at the rate of one (1) day per month, or twelve (12) days per year. Sick leave is cumulative up to 120 days. Sick leave for part-time employees will be pro-rated based on hours worked.

Sick leave may be used for doctor, dentist, other health care, or mental health care appointments. However, non-exempt employees may attend healthcare appointments up to two (2) hours in any one week without charging the time to sick leave. Generally, exempt employees are not charged sick leave for attending health care appointments.

Upon termination of employment, there shall be no compensation for unused medical leave time.
When taking sick leave, the employee shall notify the supervisor in a timely fashion to allow for the necessary work coverage and staff schedule adjustments.

Parental Leave

It is the policy of the Presbytery of Charlotte to assist new parents through the provision of paid and unpaid benefits.

Any regular full-time employee or part-time employee who has completed at least one (1) year of employment is entitled to parental leave in the period immediately preceding and following the arrival (birth, adoption, guardianship) of a child. Contract and interim employees are not eligible.
Ordinarily, the employee should apply for parental leave at least one (1) month in advance of the arrival of the child, specifying the amount of leave time desired.
The leave may be for a period of up to six (6) months. It may include some in advance of the child's arrival, as well as time after the child's arrival. Benefit coverage and service credit shall continue during the entire leave period of up to six (6) months. During this period, the Presbytery of Charlotte will continue to pay for benefit plan premiums normally covered on the employee's behalf. If the employee normally shares any portion of the cost of such benefits, the employee will continue to be responsible for her/his share.
One (1) month of parental leave shall be granted at full monthly pay (not using accrued vacation or medical leave). Alternatively, two (2) months of parental leave may be taken at 75% of the employee's monthly pay; or the employee may elect to take three (3) month's of parental leave at 60% of monthly pay. Any approved leave beyond the employer's reimbursement period shall be leave without pay.

Voting and Jury Duty

Up to two (2) hours time off with pay for voting shall be granted on the day of an election. If employees should be selected for jury duty, they shall be granted time off with pay, less the amount earned as a juror, upon presentation of a "proof of jury service" provided by the Commissioner Juror's office.

Bereavement Leave

When a death occurs in the immediate family of an employee, the employee shall be entitled to a five (5) day leave of absence with pay to arrange for and/or attend the funeral. For this purpose, immediate family is defined as parent, sibling, spouse, or child related by blood or marriage or whose relationship is similar to those relationships that are by blood or marriage.

Consideration shall be given for additional time off to be taken if the situation warrants. A request for additional leave shall be made through the supervisor and approved by the Administration Committee Additional leave may be with pay or without pay, and/or may be charged to vacation or sick leave balances.

Military Leave

Military Leave is a leave of absence for required military service. The Presbytery of Charlotte complies with applicable state and federal law concerning leaves for military service.

Leave without Pay

It is the policy of the Presbytery of Charlotte to provide leave without pay when work situations allow in those special circumstances which may require employees to take time away from work after paid leave has been exhausted. Leave may be for medical or other reasons. Such requests require approval by the General Presbyter.

Upon the employee's return from leave without pay, every effort shall be made to place the employee in the same position.

Death in Service

In the event of the death of a member of the staff, the salary of that person will be continued for four (4) weeks from the date on which the death occurs, payable to the beneficiary. Death benefits are also provided through the pension and benefits plan of the Presbyterian Church (USA).

Standards of Conduct

It is the policy of the Presbytery of Charlotte to maintain high standards of integrity, honesty, impartiality, industry, and conduct by employees.

Conflict of Interest

Avoidance of conflicts of interest, whether real or apparent, by all staff is indispensable to the maintenance of these standards. A conflict of interest arises when an employee becomes involved in a business or activity that might conflict with or might appear to conflict with the best interests of the Presbytery of Charlotte or in any way interferes with the employee's ability to perform her/his responsibilities. Employees who hold other paid positions or are engaged with other clients on a contractual basis should ensure that such outside employment or contractual arrangement shall not interfere with the performance of their duties or produce a conflict of interest in the pursuit of those duties. Employees will make an annual attestation of the lack of any conflict as part of their annual performance review. Any questions regarding this should be reviewed with the General Presbyter and resolved by the Administration Committee.

Personal Conduct Policy

To provide a productive work environment, the Presbytery of Charlotte expects you to adhere to the following Personal Conduct Policy to protect the interests and safety of all employees and the organization. It is not possible to list all forms of behavior that are considered unacceptable in the workplace. The following represent examples of behavior that may result in disciplinary action, up to and including dismissal for misconduct:

- Theft or inappropriate removal or possession of employee or Presbytery of Charlotte property.
- Destruction or unauthorized use of employee or Presbytery of Charlotte property.
- Falsification of records, including employment applications, making false statements in the course of work performance, or the commission of other fraudulent acts.
- Engaging in the manufacture, sale, distribution, dispensation, possession, use of, or being under the influence of controlled substances (without a medically acceptable prescription) or illegal drugs while on Presbytery of Charlotte property (whether or not during work hours).
- Threatening violence or engaging in violence in the workplace.
- Using abusive or threatening language or acting in a disruptive manner in the workplace or while engaged in Presbytery of Charlotte business.
- Negligence, sabotage, or improper conduct leading to damage of employee or Presbytery of Charlotte property.
- Knowing and/or willful violation of safety rules.
- Harassment, including but not limited to sexual, racial, or disability-related harassment.
- Possession of dangerous or unauthorized materials such as firearms, explosives, or other weapons in the workplace.
- Unauthorized disclosure of confidential information.
- Use of restricted computer systems without authorization.
- Unauthorized copying of licensed software and/or unauthorized receipt or disposal of digital storage devices.

Alcohol and Drug Abuse

It is the policy of the Presbytery of Charlotte to prohibit the use, possession, manufacture, or distribution of alcohol and illegal drugs in all work locations. The Presbytery of Charlotte will attempt to offer assistance to employees whose work performance, behavior, and/or attendance is impaired by alcohol and/or drug abuse, or who is engaged in the use of illegal drugs. However, if a manager or supervisor has reason to believe that an employee is under the influence of alcohol or illegal drugs during work hours, that employee may be subject to disciplinary action.

All situations involving alcohol or substance abuse will be handled in confidence. While the Presbytery of Charlotte is willing to offer assistance, the employee must first recognize that a problem exists and decide to accept treatment.

The Presbytery of Charlotte may terminate any employee whose job performance, behavior, or attendance is unsatisfactory due to alcohol or drug abuse or the use of illegal drugs, and who makes no attempt to or does not successfully complete rehabilitation.

The elements used in the Sacrament of the Lord's Supper may be considered an exception and shall be treated in accordance with the *Book of Order*.

Weapons in the Workplace

It is the policy of the Presbytery of Charlotte to prohibit the possession, use, or display of dangerous or unauthorized items such as firearms, explosives, or any type of weapon on Presbytery of Charlotte's premises.

Violation of this policy may result in immediate dismissal.

If any employee observes or suspects for any reason that an employee has a weapon, immediately contact your supervisor, manager, or personnel representative.

Use of Tobacco Products

It is the policy of the Presbytery of Charlotte to prohibit the use of any tobacco products in the work-place. This prohibition applies also to e-cigarettes and to any other vaping product.

Personal Public Witness

Representation of Position of Presbyterian Church

All persons employed by the Presbytery of Charlotte, when they are working as or presenting themselves as employees of the Presbytery of Charlotte, are expected to give full and fair representation of the position of the Presbyterian Church (USA) in matters of policy, social witness statements, or theological or doctrinal positions; however, the possibility of personal dissent is not precluded by employment with the Presbytery of Charlotte and is a reasonable expression of freedom of conscience.

Personal Public Witness Guidelines

Because public actions or expression of personal belief may affect not only the work environment but also the Presbytery of Charlotte, employee personal public witness is subject to the following guidelines:

a. When making a personal public statement, an employee shall make it clear that s/he is speaking for her/himself only and not speaking for the Presbytery of Charlotte or the Presbyterian Church (USA).

   When making a personal public witness, an employee shall not make reference to his or her employee status. If questioned, the employee may acknowledge employee status without using that status to make a claim of authority. Accordingly, it is not permissible for an employee making a personal statement to use professional stationary, claim expertise by virtue of employment in the Presbytery of Charlotte, or hold press conferences on Presbytery of Charlotte property.

b. In the event that an employee feels that s/he cannot carry out necessary job functions for reason of conscience, the employee may request a change of assignment, modification of the assignment, or may exercise his/her right to resign the position.

c. The General Presbyter or their designee is the person authorized to speak for the Presbytery of Charlotte especially regarding press questions and should be included by name on broadly shared clergy response letters.

d. Within Presbytery offices or while on Presbytery of Charlotte business, employees are expected to refrain from visible display of personal political affiliations or philosophies. Such displays might include but are not limited to clothing, posters, badges, banners, and decorations.

No Tolerance of Harassment Policy

The Presbytery of Charlotte is committed to providing a work environment that is free of discrimination. The Presbytery of Charlotte does not authorize and will not tolerate any form of harassment based on the following factors: race, color, gender, gender identification, sexual orientation, national origin, age, disability, religion, or any other characteristic protected by the law. This policy applies to all levels of employees, and to non-employees including contractors, temporary staff, vendors, suppliers, guests, etc) who harass employees or are subject to harassment by the Presbytery of Charlotte employees, both on and away from Presbytery of Charlotte property.

It is important for employees to understand that jokes, stories, cartoons, nicknames, pictures, inappropriate staring, comments, and other factors including but not limited to references about appearance may be offensive to others. Harassment is further defined as anything that would make a reasonable person experiencing such behavior feel uncomfortable or would interfere with the person's work performance.

Any sexual contact between a supervisor and supervisee, or between an employee who is in a senior position and another employee, will be deemed to be sexual harassment.

Sexual Harassment

Sexual harassment of employees by supervisors, co-workers, or vendors is prohibited. Harassment includes unwelcome sexual advances, requests for sexual favors, and other verbal, visual, or physical conduct of a sexual nature when:

- Submission to the conduct is made either explicitly or implicitly a condition of employment;
- Submission to or rejection of the conduct is used as the basis for an employment decision affecting the harassed employee;
- The harassment has the purpose or effect of interfering with an employee's work performance or creates an intimidating, hostile, or offensive work environment.

Other Harassment

Harassment based on race, color, national origin, age, disability, gender issues, or religion warrants specific mention and is also strictly prohibited. Examples of the type of behavior that will be considered harassment based on these characteristics include (but are not limited to):

- Jokes or negative comments about these characteristics
- Displays of reading materials or pictures containing negative materials about these characteristics
- Vandalism or "pranks" aimed at these characteristics
- Name-calling based on these characteristics
- Punishing an employee for complaining of these types of harassment.

Response to Harassment

Every employee has a duty to IMMEDIATELY report harassment so the Presbytery of Charlotte can try to resolve the situation. Employees must report harassment if they feel they have been harassed, observe someone else being harassed, or receive a report of someone else being harassed. The employee should report the facts of the incident(s) immediately without fear of reprisal, to a supervisor, a General Presbyter, or the Chair of the Administration Committee. In determining whether that alleged conduct constitutes unlawful harassment, the totality of the circumstances, such as the nature of the conduct and the context in which the alleged incident occurred, shall be investigated.

Procedure

In order to deal promptly, fairly and as confidentially as possible with alleged incidents of harassment, the following steps shall be taken:

- On receipt of a complaint, the Chair of the Administration Committee shall appoint three (3) members to serve as a Special Committee on Harassment. The formation of this committee shall be in accordance with the *Book of Order* section on diversity of representation.

- Within five (5) working days, the employee bringing the complaint regarding alleged harassment shall speak confidentially with the Special Committee on Harassment. This committee shall investigate the complaint in a thorough and prompt manner. If, after investigation, the Special Committee finds no probable grounds that an actual incident of harassment has occurred, it shall so advise the person making the complaint, and the matter shall be closed. If, after investigation, there is a genuine indication that an incident of harassment has taken place, the Administration Committee preferably with the permission of the person making the complaint (but not required), shall adopt one or more of the following procedures to resolve the situation:
    a.) formal grievance procedures outlined in Grievance Procedure of this policy;
    b.) development and implementation of a program of counseling
    c.) up to and including termination of employment of the offending employee.

The Commission on Ministry must be informed when a minister is involved. Minster staff members are accountable to the Harassment Policy (of the Commission on Ministry); all other employees are accountable to the policy stated in this Handbook.

Grievance Procedure

It is the policy of the Presbytery of Charlotte to make every effort to deal promptly and fairly with all complaints or grievances, the aim being the resolution of the situation which gave rise to the complaint or grievance.

Definition

For the purpose of this policy, a complaint or grievance is an alleged violation of an approved personnel policy or practice, an applicable state or federal law not adequately dealt with in these policies or practices, or an unresolved dispute between members of the staff.

When a dispute arises, all employees are encouraged to exercise good communication skills. Effective communication includes speaking and listening, actively sharing information, and communicating honestly, openly, and at the right time. Employees are also encouraged to resolve disputes informally. To do this, employees should discuss the matter with their supervisor. In situations where the dispute involves the supervisor, the employee should discuss the situation with the General Presbyter or a member of the Administration Committee. If the dispute is with a co-worker, the employee is encouraged to resolve the issue with the individual involved.

Grievance Procedure

If informal methods are not successful in resolving the dispute, the complaining party may begin a formal procedure which shall include the following steps:

- Within thirty (30) days of the first consultation with a General Presbyter or the Administration Committee member, the complaining party shall present the grievance in writing to the Administration Committee.
- The Administration Committee shall respond in writing to the grievance within seven (7) days of its receipt.
- If the complaining party feels the matter has not been resolved in a satisfactory manner, s/he may request a grievance hearing before the Administration Committee. Request for such a hearing shall be submitted to the Chair of the Administration Committee. The request shall be in writing and include the grievance, the dates of the previous steps taken, and results from previous determinations. At the discretion of the Chair of the Administration Committee, one of the following processes for hearing the grievance shall be taken:
  a) The full Committee may be called to hear the grievance.
  b) A review board of not fewer than three (3) persons from the Administration Committee shall be called to hear the grievance.
  c) In case of a dispute between employees, an outside, impartial mediator to aid in resolving the dispute may be used.
- In each of the above, the complaining party is allowed to have an advocate in attendance.

A written response to the grievance shall be given to the complaining party within fifteen (15) days of the final hearing of the grievance. The decision of the Administration Committee shall be binding upon the complaining party and all persons concerned. All proceedings and subsequent actions will be documented. In the case of clergy employees, the Committee on Ministry becomes an equal party in the grievance process.

Health, Safety and Security

Workplace Security

The Presbytery of Charlotte is committed to providing a secure work environment for all employees and visitors. This guideline applies to all employees, temporary employees, independent contractors, vendors, and visitors. It is also intended to be relevant to all employees conducting the Presbytery of Charlotte business, regardless of location.

The Presbytery of Charlotte will not tolerate acts of violence by employees nor will it tolerate acts of violence against its employees. As part of this guideline, the Presbytery of Charlotte seeks to prevent workplace violence before it begins and reserves the right to deal with behavior that suggests a propensity toward violence even prior to the occurrence of any violent behavior.

Workplace violence includes but is not limited to, physically harming another, shoving, pushing, harassing, intimidating, coercing, brandishing weapons, and threats of violence made directly or indirectly, by word, gestures, or symbols or other hostile, aggressive or injurious actions. Excessive arguing or swearing, belligerent speech, sabotage threats or sabotage of property, or a demonstrated pattern of refusal to follow Presbytery of Charlotte policies and procedures will not be tolerated.

It is everyone's responsibility to prevent violence in the workplace. If an employee observes, suspects or has been subjected to any incident that compromises the safety of her/himself, other employees or visitors, the employee should immediately contact a supervisor or manager or the Personnel Representative. If appropriate, an investigation will be conducted. Failure on the part of any employee to report an act or potential act or threat of workplace violence, or to cooperate with an investigation into a possible workplace violence situation, may be subject to corrective action, up to and including termination of employment.

If an investigation confirms that an employee has committed violence or threatened violence, the Presbytery of Charlotte will take swift and appropriate action which may include immediate termination of employment.

No employee will be subject to retaliation, intimidation or punished as a result of reporting good faith concerns about any threat, real or potential, of an act of workplace violence, or for cooperating in an investigation.

Workplace Safety

The Presbytery of Charlotte is committed to providing a safe work environment for all employees and visitors. This commitment is a joint responsibility of the Presbytery of Charlotte and its employees. The Presbytery of Charlotte relies on the alertness and personal commitment of all employees to exercise caution in all work activities and maintain a safe and healthy work environment.

The Presbytery of Charlotte makes every effort to comply with federal and state occupational health and safety laws. In an effort to prevent accidents and loss, the following procedures have been established:

Employees are asked to:

- Exercise maximum care and good judgment at all times to prevent accidents, injuries, and job related illnesses
- Seek first aid for all injuries or job related illnesses, regardless of how minor the injury or job related illness might appear
- Immediately report all injuries or job related illnesses to a supervisor or manager and supply details about how the injury or illness occurred
- Report unsafe conditions, equipment, or practices to a supervisor, manager or personnel representative.
- Contact the Personnel Representative to initiate a Worker's Compensation claim.

Note: In the event of emergency, coworkers and/or management should not transport an employee to a hospital or doctor's office. If the employee needs emergency care, contact the ambulance or emergency services.

Workplace Emergency Evacuation

To ensure safety in case of a fire or other emergency, it is imperative to follow emergency evacuation procedures defined by your local office in cooperation with Amity Presbyterian Church. Employees should be aware of and adhere to emergency evacuation procedures to facilitate the rapid evacuation of company buildings and to protect all employees.

Electronic Communications Policy

The Presbytery of Charlotte provides access to electronic communications, including the Internet, electronic mail, and voice mail, to help employees do their job and stay well-informed. The systems, which provide that access, represent a considerable and costly commitment of resources to telecommunications, networking, software, storage, etc., and are intended to facilitate the operation of the Presbytery of Charlotte. This policy applies to all employees and contractors who are granted access to any of the Presbytery of Charlotte's communication systems – electronic mail, voice mail, the Internet, and the computer network within which these systems operate.

Limited personal use of the Internet and electronic mail will not be considered unreasonable. However, employees are expected to act honestly and appropriately with regard to personal usage. That includes respecting copyrights, software licensing rules, property rights, and privacy of others. Any personal use of the Internet, electronic mail, or telephones should not interfere with work responsibilities.

Excessive or inappropriate use (use that interferes with an employee's job responsibilities) of electronic communications is unacceptable whether during business hours or during the employee's own time. Examples of inappropriate behavior includes composing, accessing, storing, sending and/or circulating any communications which reasonably could cause another employee to feel offended, embarrassed, or harassed including any material relating to race, national origin, sex, sexual preference, age or disability. Accessing Internet sites that contain sexually explicit materials and other offensive materials including but not limited to racist or violent materials, whether during business hours or during the employee's own time, is strictly prohibited.

All Internet access is logged and tracked, and all communications subject to monitor and review. Employees should have not have an expectation of privacy regarding Internet usage.

Electronic mail messages are the property of the Presbytery of Charlotte and should not be considered personal or private in nature. Messages are subject to retrieval even after deletion. Like any form of business correspondence, good judgment should be exercised in sending messages that might disclose sensitive information or be considered offensive, disruptive, or damaging to the Presbytery of Charlotte. Any such actions are a violation of the Presbytery of Charlotte policy and are subject to appropriate disciplinary action up to and including termination of employment or contract for services.

The Internet gives each individual Internet user an immense and unprecedented reach to distribute organizational messages and disclose operations and business. Because of that power, we must take special care to maintain the clarity, consistency, and integrity of the Presbytery of Charlotte's image and posture. Anything disseminated by the Internet by an employee could be construed as representing the Company's corporate posture.

FORMS

1) Annual Review of The Presbytery of Charlotte Executive Staff Cover Letter

Dear _____,

As you may know, each year the Administration Committee conducts a performance evaluation of the Presbytery of Charlotte executive staff (General Presbyter and Associate General Presbyter as those positions are occupied). We take this responsibility very seriously, and we want to be sure we have all relevant information about the professional performance of the individuals involved. A synopsis of the survey results will be prepared by the Administration Committee and shared with each of the executive employees. Confidentiality of the individual respondents will be carefully guarded.

As part of this crucial process, we are asking for your help. We need the feedback of people who have worked with our staff. Please respond to this letter by writing the Administration Committee with your comments on the performance of _____ with an emphasis on strengths as well as areas for growth or improvement.

We encourage any written comments you would like to make. We are also always available if you wish to address Administration Committee members in person with any concerns. The evaluation of the Presbytery of Charlotte executive staff would not be complete without your input. Please return your comments by email to the Administration Committee members listed below by the end of January. Thank you in advance for your assistance.

Sincerely,

The Administration Committee

Edwin Shoaf, Moderator, Administration Committee
Ehshoaf49@gmail.com

Rev. Gloria Bolden
Personnel Chair, Administration Committee
RevGBolden@aol.com

2) Performance Evaluation Form

EXECUTIVE PERFORMANCE EVALUATION FORM

Name: Signature:

_____ _____

By my signature I attest that I have no actual or apparent conflict of interest with the Presbytery of Charlotte.

Position: _____

Name(s) of Reviewer(s): _____

_____

Signature(s): _____

_____

Date: _____

1. How do you feel about serving the Presbytery of Charlotte?

2. What aspects of your work do you enjoy? What aspects do you find a struggle?

3. How does your written Position Description compare with the actual duties that you are called to perform in your current position? Where are they the same; where do they differ?

4. What progress have you realized in meeting your job-related objectives of last year?

5. What job-related objectives do you wish to set for the next twelve months (current job and career related)?

6. How do you care for yourself?

7. How can the Administration Committee and Presbytery support you in your work and growth?

8. Review of interviews to evaluate your performance.

3) Annual Self-Review and Career Planning Form

EMPLOYEE ANNUAL SELF-REVIEW AND CAREER PLANNING FORM

Name of Employee: Signature:

_____ _____

By my signature I attest that I have no actual or apparent conflict of interest with the Presbytery of Charlotte.

Position: _____

Name(s) of Reviewer(s): _____

_____

Signature(s): _____

_____

Date: _____

1. How do you feel about serving the Presbytery as a member of its staff?

2. What aspects of your work do you enjoy? What aspects do you find a struggle?

3. How does your written Position Description compare with the actual day-to-day duties that you are called to perform in your current position? Where are they the same; where do they differ?

4. What progress have you realized in meeting your job-related objectives of last year?

5. What actions should you take to develop yourself to further improve your performance?

6. What job-related objectives do you wish to set for the next twelve months (current job and career related)?

7. What actions should your supervisor take to help you further improve your performance?

8. How do you care for yourself?

9. Anything else you would want to say to the Administration Committee?

4) Progressive Discipline Letter

Dear Supervisor,

Enclosed is the new Progressive Discipline Form which the Administration Committee has written to assist the Presbytery of Charlotte staff who supervise other staff. Its purpose is to facilitate open communication and corrective action in a timely manner when job performance issues arise. Initially, verbal discussions and warnings will usually be sufficient. However, when unacceptable behavior continues or is a serious violation of policies, it may be necessary to have a more formal discussion with a written record. This record is to be completed by the supervisor, discussed with the employee, and then signed by the employee with their optional comments. It will be kept in their confidential employee file and will provide documentation if termination of the employee occurs.

Taking disciplinary action is a leadership task that most people would like to avoid altogether. Disciplinary discussions aren't easy for anyone. The employee may become angry or emotional and may even start a verbal attack. Common reactions are, "You're not being fair!" or "You've always had it in for me!" or "You're a lousy supervisor!" How do you respond? First of all, remain calm and don't accuse. In a non-threatening way, clearly explain why you have to take this action. Remain firm and fair.

Failure to correct a problem can have far-reaching effects on the morale and sense of fairness of the other staff. Consistency in expectation of job performance fosters a healthy work environment, in which each person is respected as part of the team. The job performance issues on this form are consistent with the Standards for all employees in the Personnel Handbook. To correct a problem with an employee helps them become equal contributors to the team.

A positive approach to discipline is both firm and fair. It is taking appropriate action when necessary. It is supportive, working with the employee with confidence that they can make changes. It focuses on the behavior with the intention of solving a problem, not punish the employee; therefore, it includes a plan to resolve the performance issue.

The supervisor should complete the first part of this form, and then in discussion with the employee, devise a plan to resolve the issue. After the conversation, the employee must sign the form. If they object, explain that it means the employee acknowledges that the conversation took place. It does not mean they are admitting to a problem. There is space for them to write their comments. It should be stressed that this action is taken with the intention of solving a problem, not as a punishment. It should be clear that this form will be placed in their confidential employee file, and that failure to correct behaviors can lead to job termination.

The Administration Committee hopes that this form will be useful for supervisory staff. We welcome comments, questions, and feedback.

5) Progressive Discipline Form

PROGRESSIVE DISCIPLINE FORM

Position: _____

Name(s) of Reviewer(s): _____

_____

Signature(s): _____

_____

Date: _____

Issue to be considered in this counseling session (may attach separate pages):

Suggested action plan with timeline to resolve issue (may attach separate pages):

Consequences of failure for action plan to be fulfilled (may attach separate pages):

Level of this session: Written warning____ Final notice_____

I acknowledge the occasion of this counseling session and that I have received and read a copy of this form- signature of employee:

_____

Employee's statement about issue to be considered (may attach separate pages):

6) Volunteer Information Form

VOLUNTEER INFORMATION FORM

Date: _____

Name: _____

Address _____

_____

Email: _____

Telephone: _____

Emergency Contact

Name _____

Telephone _____

If required to have a background check per the Administration Manual, the:

Background check was completed: Yes_____ No_____

Date of Background check_____