

**First Presbyterian Church
of Santa Fe**

Human Resources Manual

2017

**Approved by Session
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FIRST PRESBYTERIAN CHURCH
of Santa Fe

Behold. Be still. Become.

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Foreword

This Human Resources Manual (the HR Manual) is designed to inform employees of the employment policies of the First Presbyterian Church of Santa Fe (FPC or the Church), including the Child Development Center (CDC). The Personnel Committee of the Session (Personnel Committee) and the Head of Staff developed this manual and Session approved the manual to explain the policies and practices that affect all staff employed by FPC consistent with Federal, State, and local laws and with the goals and mission of the Church. (NOTE: In instances in which a letter of engagement contains exceptions to the policies of this manual, such a letter or written document will control.) The HR Manual is made available to each employee at the time of employment for information and subsequent reference.

In order to refresh the employees' understanding of FPC policies, all employees are encouraged to annually review the policies, including those concerning sexual misconduct and substance abuse (unless exempted in the letter of engagement).

This HR Manual is not a contract. FPC reserves the right to amend the policies, benefits, or terms at any time and for any reason and without prior notice, consideration, or approval by any employee group. As the information changes, revised pages will be distributed to staff members. Each new staff member is expected to read the HR Manual and sign a statement indicating an understanding and acceptance of the policies and provisions contained therein. Additionally, FPC requires employees to certify that they have reviewed all changes to policy.

The **Personnel Committee** is responsible for annual review of the HR Manual, working with Head of Staff and CDC Director to ensure compliance and uniform application of the policies. Revisions to the manual are approved by the Session. The Personnel Committee welcomes suggestions for change.

The **Head of Staff** (the Pastor unless otherwise designated by the Session of FPC) is administratively responsible for implementing the policies outlined herein and will work closely with the Personnel Committee concerning personnel issues.

The **Child Development Center Director**, reporting to the Head of Staff, is responsible for implementing the policies within the CDC.

Final approval responsibility for the HR Manual and subsequent changes rests with the **Session**.

FPC Mission

What We Believe We Are Called to Do:

BEHOLD a transforming God who invites us to

- A joyous way of being
- A bolder way of believing
- A deeper way of seeing

BE STILL and take time to

- Focus on the Spiritual
- Restore our energy
- Experience God's word in scripture, music and art

BECOME followers of Jesus who are

- Open to God's Spirit
- Trusting, welcoming, caring for one another
- Passionate about including everyone, confronting injustice, and healing the world

Child Development Center Philosophy and Mission

The Child Development Center is a community outreach program that embraces....

- A child-centered philosophy of education while striving to accommodate the needs of the surrounding community.
- A natural, joyful learning experience that enhances development of the child; therefore, we are sensitive to each individual child's social, emotional, intellectual and physical needs.
- Programs open to those of all faiths, as we embrace and teach global principles of kindness, compassion, tolerance and inclusivity.
- A learning environment that fosters each child's chance for gaining self-confidence and interpersonal skills in all settings.
- Physical safety as of the utmost importance and security measures that are strictly enforced

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1. General Employment Information

1.1 Equal Employment Opportunity

FPC will recruit, hire, call, train, and promote all persons in all job classifications without regard to race, creed, color, national origin, sex, sexual orientation, age, marital status, or religious affiliation (except when religious affiliation is determined to be a *bona fide* occupational qualification, e.g. the call of a pastor or associate pastor) and without regard to physical, mental, or medical disability unrelated to the ability to engage in essential job duties involved with job performance. This policy applies, but is not limited, to hiring, placement, promotion, demotion, transfer, recruitment, or recruitment advertising, lay off or termination, rate of pay or other forms of compensation, and all other aspects of employment.

1.2 At-Will Employer

FPC is an employment-at-will employer. This means that either the employee or FPC may choose to terminate the relationship at any time, with or without cause or notice. While FPC would appreciate the employee's courtesy and professionalism in giving two weeks notice of the intent to leave, this is not mandatory. Providing two weeks notice of intent to leave will make the employee eligible for rehiring at a later date. FPC seeks to have a productive employment relationship with its employees, but it does not promise lifetime or long-term employment.

A supervisor's oral statement cannot modify the employment-at-will status (or any other material term of this HR Manual). Any employment agreement must be approved by Session and signed by the Clerk of Session.

1.3 Employment Eligibility

The employment of relatives in the same program area may cause problems with favoritism and staff member morale. Ordinarily first-order family members (parent, child, sibling, or spouse/partner) may not be hired to work in the same program. No person may be employed in a position that is under the direct supervision of a first-order family member.

Members of FPC are not eligible for employment. However, exceptions can be made for part-time and temporary employees for unusual circumstances upon recommendation of the Head of Staff and approval by the Session.

1.4 Staffing

In general, staffing assignments are determined on an annual basis. The Session is responsible for developing an annual budget that incorporates the anticipated staffing requirements for the next year. However, within the CDC, more frequent staff adjustments may be necessary in order to maintain appropriate ratios of instructional staff to children. These changes might occur when enrollment increases or declines and are the responsibility of the CDC Director.

1.5 Recruitment and Hiring

As part of the process of recruitment, and before recruitment can begin, a written position description which accurately reflects the essential job functions, training or other requirements, working hours, and salary/wage range will be developed by the Personnel Committee, Head of Staff and/or CDC Director, and members of the committee who will work directly with the employee to be recruited. Session must approve the job description. It may be necessary to revise the approved job description in consultation with the potential staff member, but Session must approve any substantive revisions.

Installed pastors are recruited, selected, and called in accordance with the provisions of the Presbyterian Church (USA) Book of Order.

Members of the Personnel Committee, the Head of Staff, and members of that Session committee who will work directly with the employee recruit all non-CDC Church staff employees.

The CDC Director with the participation of representatives from the Child Development Center Advisory Committee (hereafter referred to as CDCAC) will be responsible for interviewing potential CDC employees and making hiring decisions.

FPC requires each new employee to submit to a background (and finger printing for CDC staff) check within the first 10 days of employment. See **Appendix A** for the form to be completed in order to begin the background check process. Background checks will be repeated at a minimum of every three years of employment.

1.6 New Staff Orientation

The Head of Staff, CDC Director, and other supervisors may elect to meet with each new employee monthly for the first three months of employment to discuss all aspects of the job. At the end of this probationary period, the supervisor may conduct an informal evaluation.

An employee may begin employment before results of the background (and fingerprint, as required for CDC staff) check have been received, but the employee will not be alone with children until the background check is complete. Continued employment depends on receiving satisfactory results from the employee's background (and fingerprint, as necessary) check and approval of Session.

All new employees shall be provided with a current copy of the HR Manual and will review the manual with a supervisor. Employees will receive information concerning benefits, including medical insurance, payroll information, and accrual of vacation and sick leave. New employees shall also attend the first available Sexual Misconduct

workshop scheduled after beginning work. At the conclusion of the orientation, employees will be asked to sign a document acknowledging receipt of the information and agreement to abide by the policies of FPC.

Supervisors will assure that new employees complete the *New Employee Orientation Checklist* within the first week of employment.

1.7 Outside Employment

An employee may accept part-time employment outside of FPC, but the responsibilities of such employment must not conflict with the responsibilities that employees have at FPC. When an employee is considering an outside part-time position, the CDC Director and/or the Head of Staff shall be advised so that appropriate consideration of responsibilities can be made. FPC will assume no responsibility for the employee or the performance of the employee while employed outside FPC.

1.8 Personnel Files

The FPC Business Manager maintains a secured personnel file on each employee, the contents of which are specified in the *Personnel File Checklist* (see **Appendix D**). As required by law, some records pertaining to employees may be maintained in separate files relating to medical issues and internal investigations. Employees, or their representative, may request access to their basic personnel file. For purposes of this policy, employee personnel files include records related to performance and training as well as other records used for hiring, promotion, and disciplinary decisions. Employees are not permitted to remove any documents from the personnel file but may provide a written response to any document in the personnel file. Written responses will be attached to the original document in the personnel file. Employees may request copies of documents in their personnel file. Requests for copies must be made in writing to the Business Manager.

Supervisors and the Business Manager (or Chair of the Personnel Committee) may need access to specific sections of personnel files, including filing and reviewing compensation history and performance evaluations. When the Business Manager grants access to a personnel file, the individual seeking access will fill in all information requested on the *Personnel File Access Log*, affixed to each personnel file. Employees requesting access to their personnel file must schedule with the Business Manager an appointment to view the file during normal office hours.

2. Attendance at Work

2.1 Employee Categories and Benefits Eligibility

- *Exempt Employees* are employees whose positions meet specific exemption tests for executive, administrative, or professional positions as established by the federal Fair Labor Standards Act (FLSA). Such employees are exempt from FLSA's

provisions for overtime pay. Exempt employees will not be paid for hours worked over 40 in a week, but in extenuating circumstances may be granted compensatory time off within the same pay period in which the overtime occurs with approval of Head of Staff or CDC Director. Compensatory time cannot be accumulated.

- *Non-exempt Employees* are employees whose positions do not meet the FLSA exemption tests. Such employees must be paid additionally for all hours worked beyond their regular work schedule. Non-exempt employees will be paid at straight time for all pre-approved hours worked up to 40 hours per workweek, and at a rate of 1.5 times their hourly wage for all pre-approved hours worked over 40 hours per workweek. The supervisor must approve all overtime.
- *Full-time Employees* are employees hired to work 30 or more hours per week. Such employees are eligible for FPC benefits.
- *Part-time Employees* are employees hired to work less than 30 hours per week. Such employees are not eligible for FPC benefits.
- *Temporary Employees* are employees who are hired for a specified period of time under a letter of engagement, which may be periodically renewed at the discretion of FPC. Eligibility for benefits will be based on hours worked and as documented in the letter of engagement. If a temporary employee joins the regular staff, his/her temporary employment is not considered as credited service in computing entitlements to vacation and other benefits.
- *Installed Pastor* is a Teaching Elder serving in a called and installed pastoral relationship with FPC.

The policies and benefits applicable to FPC employees of any category are not applicable to persons serving FPC as independent contractors, as defined by applicable federal and state laws.

2.2 Working Hours

The core hours of the church office are 10:00am to 4:00pm Tuesday through Friday. This is the time period in which church members can reasonably expect to find someone in the office and can expect phones to be answered with the help of volunteers.

Employees will take lunch breaks and other breaks as needed. The work schedules for staff members may vary, and any deviation from the regular hours of work will be identified in the letter of engagement.

Holidays, vacation, and sick leave taken in a given work week do not count toward overtime.

2.3 On-call/After-hours Church Service

A non-exempt employee who is requested to remain on call on the church premises after the employee's regular working hours is considered to be working while "on call." A non-exempt employee who is requested to remain on call at home, or who is

requested to leave a message where he/she can be reached, is not considered to be working while on call. If and when the on-call employee responds to a call or message, the time spent responding, including travel time to and from the church premises, is working time.

2.4 Attendance/Punctuality

Each staff member is expected to be present and ready to work during all scheduled work hours.

The employee shall personally call the supervisor if the employee will be late or absent. That call should provide enough notice prior to the employee's starting time for a substitute to be located, if needed. It is not adequate to leave a message on the church answering machine except in an emergency.

2.5 Emergency Closings

At times, emergencies such as severe weather, fires, or power failures can disrupt operations. The church office will follow the same schedule as the public schools in inclement weather for delayed opening or full-day closing.

3. Workplace Professionalism

3.1 Keeping the Church Safe for Children and Youth

In order to assure the physical and emotional safety of all children and youth attending or visiting FPC and to protect FPC paid and volunteer staff, FPC has established the following safeguards that create an environment where healthy, safe, and nurturing relationships can take place between children, youth, and adults.

- Children in Photos—Parents or guardians may sign a “Do Not Print” instruction if they do not wish to have photos of their child(ren) printed or published in any written Church publication, including the website. FPC will not use identifiable pictures of children on the website.
- Volunteers Working with Children
 - Volunteers working with children and youth will be subject to a background check.
 - Persons under the age of eighteen must work under the supervision of a teacher or an adult leader.
- Training and Education--FPC requires all staff to complete annual training according to the Sexual Misconduct Policy.
- Reporting
 - Anyone who knows or has a reasonable suspicion that a child has been abused or neglected shall report the matter immediately to the CDC Director and Head of Staff who will report the matter to the New Mexico Children and Youth Protective Services.
 - The Head of Staff will also notify the parents(s) or guardian if notification does not endanger the child or youth.

- General Supervision Guidelines for Children and Youth
 - Two approved adults must be present for programs and activities for children and youth.
 - Personal conferences or talk sessions between adult, children, or youth shall be conducted in view of other adults, children, or youth.
 - Group meetings and programs will be announced in church bulletins, church newsletters, and the church web site.
 - All group outings require written permission forms signed by parent or guardian. Permission forms will cover a specific outing or time period.
 - Volunteers and/or paid staff may transport an individual child or youth only with approval of the parent or guardian. This approval may be arranged by telephone, if necessary.
 - When possible, the privacy of children, youth, and adults must be respected. Physical punishment will not be tolerated.
 - All overnight programs require at least two approved adult chaperones for every 12 participants. If participants are male and female, chaperones must include both male and female. If these conditions cannot be met, then the event shall be canceled.
 - New volunteers will work with experienced volunteers for a 3-month period.

3.2 Sexual Misconduct

FPC does not tolerate sexual misconduct by church professionals, employees, volunteers, or any others serving in the name of the Church or on behalf of any church-related organizations or entities, whether or not such conduct is on church premises. All church professionals, employees, volunteers, or any others serving in the name of the Church, who are working with or caring for children, must complete the FPC Sexual Misconduct training as soon as possible after beginning work. Installed pastors must also complete the Presbytery-directed sexual misconduct training. Every staff member, volunteer working with children, and Session member is required bi-annually to take the FPC training session on sexual misconduct.

Sexual misconduct is defined as

- Physical sexual contact of any kind between a church minister, professional, volunteer, or other employee who is providing a service or benefit as part of a church program and any person receiving such service or benefit whether or not consent is given or implied;
- Offensive, obscene, or suggestive language, seductive behavior, unwelcome touching or fondling;
- Sexual harassment constituted by unwelcome sexual advances, either in person, by telephone, or through e-mail, requests for sexual favors, and verbal or physical conduct of a sexual nature when
 - Submission to such conduct is made either explicitly or implicitly a term or a condition of an individual's employment or their continued status in an institution;

- Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual; or
- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance by creating an intimidating, hostile, or offensive working environment.
- Rape, sexual contact by force, threat, or intimidation, or any other sexual conduct that constitutes a violation of the criminal laws of the state where the conduct occurred.

As defined by statute in the State of New Mexico, child sexual abuse includes but is not limited to criminal sexual contact, incest, or criminal sexual penetration, as those acts are defined by state law, and sexual exploitation, which includes involving a child in prostitution or the production of pornography.

Anyone who believes that a violation of this sexual misconduct policy has occurred should contact the Pastor (Head of Staff), Clerk of Session, or an Elder of FPC who, when notified, should take appropriate prompt remedial action designed to stop the conduct. The Head of Staff, guided by the Session through its Personnel Committee and/or Administrative Committee, will take action deemed appropriate against the alleged offender.

If the alleged offender is clergy, the Chair of the Personnel Committee, the Clerk of Session, and the Presbytery of Santa Fe shall be contacted promptly. Such allegations then become the administrative responsibility of the Presbytery.

The FPC Session will be guided by this policy and any related policies of the Presbytery of Santa Fe or the PC(USA) General Assembly.

Violations of this policy are subject to disciplinary action, including termination of employment and referral for criminal prosecution.

The State of New Mexico requires that every person who knows or has reasonable suspicion that child abuse or neglect has occurred shall report the matter immediately to local law enforcement or county social services in the county where the child resides.

3.3 Drugs- and Alcohol-Free Workplace

FPC is committed to providing a safe work environment and to promoting and protecting the health, safety, and well being of its employees. Substance abuse may have a detrimental effect in terms of staff productivity, absenteeism, accidents, medical costs, theft, and workers' compensation costs.

It is a violation of FPC policy for any employee to

- Use, possess, sell, convey, distribute, or manufacture illegal drugs, intoxicants, or controlled substances, or to attempt to do same in the workplace. If an

employee must take prescription medications that affect the ability to perform the job, the employee shall notify the Head of Staff to determine what action is necessary.

- Use or be under the influence of alcohol at any time while on church property or officially conducting church business.
- Use prescription drugs illegally. However, nothing in this policy precludes the appropriate use of legally prescribed medications.

Violations of this policy are subject to disciplinary action, including termination of employment and referral for criminal prosecution.

The Head of Staff and/or CDC Director in consultation with the Head of Staff may initiate a drug test as a consequence of the following situations: post-accident or reasonable suspicion.

- Post Accident - When a staff member either sustains an injury that requires medical treatment in the course and scope of employment or contributes to or causes another person to sustain an injury in the course and scope of employment; or when a staff member causes, indirectly or directly, damage to church property or the property of another.
- Reasonable Suspicion - When a staff member while in the course and scope of employment exhibits behavior that causes the Head of Staff and/or CDC Director to be concerned about the employee's ability to perform job functions.

The Head of Staff and/or CDC Director will document such behavior and concerns with respect to the employee's performance in relation to the job and will review information with the Head of Staff.

If the Head of Staff is suspected of violation of FPC's drug and alcohol policy, any staff member may notify the Chair of the Personnel Committee or the Clerk of Session. The Personnel Committee will work with the Commission on Ministry of the Presbytery of Santa Fe if clergy are in violation of FPC's drug/alcohol policy.

Any employee with a confirmed positive test result may provide a valid explanation for the test result and a review of the tests at staff member's expense. After review, if results are positive, the staff member will be placed on administrative leave. A meeting of the Session will be called to review the drug test results. Upon recommendation of the Head of Staff and with approval of the Personnel Committee, the employee may be terminated. If an employee is actively using any illegal drugs or alcohol while on duty, the employee is not considered to be disabled as defined by the Americans with Disabilities Act (ADA).

For testing process and policies, see **Appendix B**

For medical coverage for alcohol and drug abuse, see **Appendix C**

3.4 Tobacco-Free Facility

FPC has implemented a Tobacco-Free Policy for the overall health and welfare of its members, employees, children in the Child Development Center, and visitors. Tobacco use will not be permitted within Church buildings or on Church grounds. This also means that FPC does not provide a designated smoking area. This policy applies to all employees, members, visitors attending events at the Church, and groups who rent the facility.

In hiring staff, FPC will not refuse to select nor terminate persons who smoke, provided the Tobacco-Free Facility policy is followed.

For medical coverage on smoking cessation, see **Appendix C**.

3.5 Weapons and Firearms

The carrying or possession of any type of weapon or firearm on the premises of First Presbyterian Church of Santa Fe is strictly and absolutely prohibited. ***This prohibition expressly includes those persons licensed to carry concealed firearms (other than those who are licensed peace officers).*** For purposes of this policy, the premises of FPC are defined as any property, building, or portion of a building or property that FPC owns or occupies, whether on a temporary or permanent basis, and any off-site premises where FPC is conducting any activity sponsored by FPC. ***This includes all parking lots, parking areas, sidewalks and walkways, and all FPC-owned or -leased vehicles and equipment.*** Any person violating this policy will be required to leave FPC's premises immediately. Any employee found to be in violation of this policy will be subject to discipline, including immediate termination. The only valid exceptions to this policy must be obtained ***in advance*** of coming on FPC's premises while possessing a weapon or firearm and approved in writing by FPC's Session. No FPC officer or staff member has authority to grant verbal extensions to this policy.

3.6 Appropriate Dress

FPC and its CDC serve as places of worship and education, respectively. Therefore, employees are expected to dress accordingly. While FPC does not have a strict dress code, all employees should dress comfortably and conservatively. Tight fitting, revealing, and suggestive clothing should not be worn in the workplace. Shirts or other clothing with slogans or suggestive language are considered improper in the school or church setting. If the employee has questions about appropriate dress, those issues should be addressed with the supervisor. The supervisor has the authority to ask that an employee return home to change clothes that are deemed inappropriate for the workplace.

3.7 Staff Meetings

Staff meetings are held weekly. The Director of Music, Business Manager, Office Manager, Facilities Manager, CDC Director, and Pastor(s) are requested to attend; and other staff members may be involved as needed.

3.8 Children in the Workplace

As a general rule, employees should not bring children into the workplace except for a short visit. When childcare cannot be arranged, the staff member may use available leave, with the supervisor's approval.

3.9 Health and Safety

All employees are expected to comply with state and local laws and regulations. Failure to do so may result in corrective action, up to and including termination. If an employee believes there is a health or safety issue, the employee should bring the condition to the attention of the supervisor.

FPC does not tolerate theft of property, personal or institutional, and will terminate staff members for such actions. Employees should not leave valuables unattended in the work area, nor should staff members bring large sums of cash into the office or leave purses, wallets, or cash unattended.

3.10 Use of Church Resources

Employees will not be held responsible for providing materials needed for work. At the same time, the employee should not consider the supplies and equipment provided by the church to be available for personal use. Similar guidelines apply to time on the job and workspace.

Usage of FPC equipment or materials for political campaign purposes is strictly prohibited. Usage of FPC equipment for personal business, including phones, computers, printers, and copiers for personal business, is allowed on breaks or after hours as long as the use of office supplies is kept to a minimum. Personal telephone conversations during the day should be kept to a minimum. (Telephones available within the CDC classrooms should be used for most communications.)

The FPC policy is to limit internet access during working hours to official business. Employees are authorized to access the internet for personal business on breaks or after hours in strict compliance with the other terms of this policy. The intentional introduction of viruses, or malicious tampering with any computer system, is expressly prohibited. Any such activity will immediately result in termination of employment.

Employees using FPC's internet accounts are acting as representatives of the organization. As such, employees should act accordingly so as not to damage the reputation of the organization. Employees must have no expectation of privacy in terms of what they store in the workplace or when using any of FPC's equipment or internet access for personal business. They should be aware that computer systems are regularly updated and reviewed to keep them in optimal condition.

3.11 Use of Personal Cell Phones

Employees often serve as the public image of FPC. They should be aware of this and make every effort to comport themselves accordingly.

Employees are asked to refrain from the use of cell phones for personal conversations or for text messages except in emergencies or with the express approval of the appropriate supervisor.

3.12 Accepting Entertainment or Gifts

It is acceptable for employees to receive a gift of nominal monetary value in commemoration of a birthday, holiday, or other celebration. However, employees should also be mindful to avoid the appearance of inappropriate behavior in the acceptance of such a gift. No employee should accept a favor with monetary value, discount, loan, or forbearance from another employee or member of the congregation that could be interpreted by others as an inducement that might place the employee under an obligation to the donor. In particular, the employee may not provide special recognition or exchange of service for such a favor. If in doubt, the employee should discuss the situation with the supervisor.

3.13 Conflicts of Interest

A conflict of interest arises when an employee has a personal interest that could benefit from his or her official FPC actions or influence. Employees must avoid situations in which they have a real or apparent potential of receiving a direct or indirect benefit to themselves or to members of their family as a result of their FPC actions or actions of their subordinates. If an employee is uncertain whether a real or apparent conflict of interest exists, the employee should confer with the supervisor before taking action.

3.14 Confidentiality

Maintenance of strict confidentiality is implicit in the ministry of this church and in the conduct of its business. This includes confidentiality in matters related to other staff members, members of the congregation, children enrolled in the CDC, or their parents. Information acquired in the course of performing church duties that is or appears to be confidential should be treated as such. Such information is not to be divulged without appropriate authorization. These restrictions do not apply to confidential information that the individual staff member must share with the Head of Staff and appropriate committees of the Session in order to provide effective and complete communications about the operations and function of the church administration. Exceptions to this policy can only be made with the full knowledge and consent of the Head of Staff and only when there is a legitimate need to know.

All information concerning the children who are enrolled in the CDC and their parents should be considered confidential and may not be discussed with anyone other than the parent or legal guardian of the child. Exceptions to this policy can only be made with the full knowledge and consent of the CDC Director and only when there is a legitimate need to know.

The responsibility of confidentiality extends beyond the work time and workplace. Employees who disclose confidential information or non-confidential business information will be subject to disciplinary action up to and including dismissal.

3.15 Dealing with Questions Concerning Ethical Issues

If an individual employee encounters a situation in which there is uncertainty about the appropriate ethical resolution to the matter, it is the employee's responsibility to confer with the Head of Staff or CDC Director as soon as possible to receive guidance before taking any action.

If an employee observes another employee behaving in an unethical or questionably ethical fashion, the observer should discuss the observation immediately in a private conversation with the suspected individual. If this resolves the situation, both individuals should consider the conversation closed and maintain confidentiality. If this conversation does not resolve the matter, the observer should consult with his/her immediate supervisor who should either resolve the matter to the satisfaction of the observer or meet with the suspected individual and propose a resolution. If this does not resolve the matter, the concern should be taken immediately to the Head of Staff for disposition.

If the perceived unethical behavior involves the Head of Staff, the Chair of the Personnel Committee, or the Clerk of the Session or other appropriate corporate officer of the church may be notified.

If an employee observes institutional behavior that is believed to be unethical, the employee should immediately meet privately with the Head of Staff to explain the concern and to seek a resolution to the concern. If this results in an unsatisfactory outcome, the employee should submit in writing a statement of concern to the appropriate corporate officer of the church. It may be possible to handle the concern at this point in a confidential matter. If not, the matter should become an item of business for the Session with the expectation that the issue will be resolved in less than three months time.

3.16 Retaliation

Allegations of retaliation for whistleblowing, or for claims of discrimination or sexual harassment, are investigated. Employees who believe they have been subject to retaliation shall report such conduct immediately in accordance with this policy.

4. Compensation and Benefits

4.1 Timesheets/Paychecks

Employees receive compensation twice per month (24 pay periods per year) per the letter of engagement or Personnel Action Form. The regularly scheduled payday is the

6th and 21st of every month. Timesheets are due from all employees by 9:00am on the 16th and on the 1st of every month, or if a school or bank holiday falls on one of those days, timesheets may be due early. All employees may sign up for direct deposit.

Non-exempt employees must record all hours worked and leave taken. Exempt employees record just the leave taken. Timesheets must be filled out accurately and signed by the employee. No other employee may fill out a timesheet for someone else.

4.2 Annual Compensation Review

Compensation shall be determined and adjusted in consideration of factors including parity with the community, Presbytery guidelines, longevity, performance review, and budget limitations. The Personnel Committee is responsible for recommending to the Session on an annual basis all compensation changes in a manner that is responsive to such factors as well as changes in the cost of living and in keeping with the church's compensation standards.

Comprehensive analysis of employee compensation will be undertaken by the Personnel Committee in conjunction with other concerned committees as required, and within the budget of the church.

In accordance with the Book of Order, approval of changes in compensation (Terms of Call) for Installed Pastors is the responsibility of the congregation. Such changes are submitted to the Santa Fe Presbytery for its action. Changes are effective upon approval of the Santa Fe Presbytery.

4.3 Social Security

Staff members other than ordained pastors are covered under Social Security. The FICA tax will be deducted from the employee's salary, and FPC will pay its share. Pastors are considered self-employed by the IRS. FPC pays 50 percent of the Social Security Trust Fund (SECA) cost for clergy.

4.4 Benefits Plan

The policies and practices of the benefits plan in place, currently the Benefits Plan of the Presbyterian Church (U.S.A.), supersede any information in this manual. All teaching elders serving in installed positions are enrolled in the Pastor's Participation by mandate of the *Book of Order*. Employees of the FPC who work 30 or more hours per week and their families shall be eligible to participate after 90 days of employment. Employees who lose their qualification for this benefit because of insufficient hours over a period of one month must reapply for participation.

Core options of the Benefits Plan currently offered to FPC eligible employees include medical and death and disability options. Employees may elect to have deducted from the paycheck options offered by the plan such as dental and supplemental death and disability. Pension benefits are only available to employees hired prior to January 1,

2017, and who are categorized as full-time or part-time working 30 hours or more per week. (Employees hired after December 30, 2017, are eligible for a matching benefit in the Retirement Savings Plan, as stated below.) Installed pastors have non-contributory participation in the pension plan. Details of the Benefits Plan, including the pension plan, are available on the Board of Pensions website (www.pensions.org).

All employees regardless of hours worked or participation in the Benefits Plan may take advantage of the Retirement Savings Plan. After three years of employment, FPC offers a matching benefit up to 5 percent of salary only to employees hired after December 31, 2016, and who are working 30 hours or more per week. (This does not include teaching elders.)

Benefits are not a guarantee, and employees must meet the eligibility requirements of any particular plan. Where there are discrepancies between personnel policies and the plan, the terms of the plan will govern.

4.5 Medically Certified Disability Leave (short term or long term)

Full-time employees who have worked for FPC for at least three years and who become unable to work due to a medical disability may be eligible for disability benefits from FPC. Employees who have worked for FPC for less than three years may be considered for disability benefits only with the approval of the Session. In either event, the employee must have exhausted all vacation and sick leave before receiving disability benefits from the church. The total of expended leave and church benefits may not exceed 90 days.

To be eligible for these disability leave benefits, the individual must have a medical condition that prevents employment and is documented by a physician's certification of disability. Approval of these benefits requires authorization by the Session. Such approval may include full salary and benefits. A physician's recertification of the disability and Session review of the ongoing disability may be required on a monthly basis. The effective beginning and ending dates of the period of disability are medically determined. If the individual remains disabled at the end of the maximum ninety days, the employee shall be transferred to the status of leave without pay. The individual, if a participating member of the Board of Pensions plan, may also be eligible for additional disability benefits from the plan commencing no earlier than the 91st day of the disability. The individual should anticipate possible extended disabilities and confer with representatives of the Board before that time. The Board will make a determination of eligibility. Part-time: less than 30 hours per week and temporary employees are not eligible for disability benefits. Employees who are injured on the job are not eligible for disability benefits under this plan but may be eligible for benefits under the Workers' Compensation program. Benefits from Workers' Compensation shall also require physician certification according to the guidelines and policies of the program.

4.6 Worker's Compensation Insurance

In accordance with the law of the State of New Mexico, exempt and non-exempt employees are covered under the Workers Compensation and Employer Liability insurance policy issued to FPC.

4.7 Staff Development and Continuing Education

FPC encourages and supports staff development through training and continuing education. Such programs afford staff members the opportunity to acquire new skills and knowledge and to refresh current skills needed to accomplish their goals and objectives. The process of staff development is an integral part of the annual performance evaluation. Staff members may request training related to the member's current job responsibilities.

CDC staff will attend all in-service activities as determined by the CDC Director. This includes monthly meetings, workdays at the end of the school term, and workdays before school year begins.

CDC employees will comply with all Child Care Licensing educational regulations through the Department of Children Youth and Families Division

CDC staff must complete 24 hours of continuing education each employment year. This training must be completed by a registered early childhood trainer through the New Mexico Early Childhood Training Registry and each employee must ensure that training is completed in all seven competency areas every two years. It is the responsibility of each staff member, including part-time and temporary employees, to complete this training requirement. Documentation shall be filed in the staff member's personnel file. CDC staff must complete training in the following competency areas: 1) child growth, development, and learning (including working with both typical and atypically developing children); 2) health, safety, nutrition, and infection control; 3) family and community collaboration (diversity, working with differing cultures and languages and positive relationship building with families); 4) developmentally appropriate content; 5) learning environment and curriculum implementation; 6) assessment of children and programs; and 7) professionalism (supervision, teamwork, and leadership development).

Generally, classes should be attended during non-teaching hours. The CDC Director may determine participation in continuing education scheduled at times which would require granting a teacher paid time off to attend. The Church will provide tuition fees.

Funds are available to support the CDC Director's attendance at a national conference each year. The Church will pay tuition fees, and the Director will be reimbursed at the recognized US Government Services Administration per diem. Since these rates are variable according to meeting location, the Director will begin plans to attend the

conference as part of the annual performance review with the Head of Staff. The Director will provide an estimated budget.

The State of New Mexico requires that persons working in licensed child development centers complete the 45-hour course (or other approved 3 credit hour early childhood education course). If the staff member has not completed the required 45-hour requirement or other approved 3 credit hour early childhood education course prior to employment, then the 45 hour requirement shall be completed within the first six months of employment. All employees working with children are required to attend the bi-annual Sexual Misconduct training session.

4.8 Sabbaticals

Installed Pastors and the Director of Music/Organist shall be eligible for sabbatical upon completion of seven years of service at FPC. Clergy must notify the Commission on Ministry of the Presbytery of Santa Fe of their plans for sabbatical leave.

At least 12 months in advance of the anticipated leave of absence, the staff member shall submit a sabbatical proposal in writing to the Head of Staff, Personnel Committee, and the Session committee working most closely with the employee. The proposal shall include

- Inclusive dates of the proposed leave of absence;
- The type of ministry-related activity planned for sabbatical;
- Other plans for physical rest, personal recreation, family responsibilities, intellectual stimulation, and spiritual renewal; and
- A strategy for coverage of staff position during the sabbatical leave.

The proposal should demonstrate that the planned activities of the sabbatical meet the professional and spiritual needs of the individual as well as the needs of the church.

Participants in the sabbatical leave program are expected to commit to one year of employment at FPC following the completion of the sabbatical leave.

Award of sabbatical leave is dependent upon availability of funds at the time of the request and employee fulfillment of the eligibility requirements for seeking leave and requires the approval of the FPC Session. Maintaining the total functions of the church and the budget will be primary factors in considering the granting of sabbatical leave.

4.9 CDC Fee Discounts

CDC provides a 10 percent discount on fees for the children of teachers in CDC and other employees or contractors of FPC, children of FPC members, and children of public school teachers.

Families who have more than one child enrolled in the CDC program also receive a 10 percent discount on fees for each child.

5. Employee Time Off From Work

5.1 Holiday Schedule

Paid holidays for full-time employees except those of CDC:

- New Year's Day
- Martin Luther King Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving
- Friday following Thanksgiving
- Christmas Day
- Day following Christmas Day

The CDC Director will determine the holidays for CDC staff based on the Santa Fe Public School Calendar.

Full-time exempt and full-time non-exempt employees whose regular day off occurs on a paid holiday are entitled to receive another day off with pay in the same pay period. Full-time exempt employees who are required to work on a paid holiday shall be granted compensatory time off within the pay period.

Full-time non-exempt employees who are required to work on a paid holiday receive another day off with pay in the same pay period.

When an employee is eligible for approved compensatory time off or for another day off with pay, as described above, the selection of a particular day off or compensatory time is subject to supervisor approval.

5.2 Vacation and Vacation Approval

Vacation time must be approved by the Head of Staff or CDC Director as far in advance as possible so that the workload is not seriously jeopardized. FPC reserves the right to deny vacation requests due to workload. Compensation for accrued but untaken vacation leave will be made only upon termination of employment. If the employee initiates the termination, then two weeks notice must be given in order to receive this benefit.

- Installed Pastors—FPC follows the regulations established by the Presbytery of Santa Fe and provides vacation time that meets or exceeds the Presbytery minimum. On January 1 installed pastors receive their total vacation allotment for the year.
- CDC Teachers—Teachers receive 24 hours of vacation hours on January 1. (If hired during the year, they receive 24 hours if hire date is in the months of January to April, 16 hours if hire date is in the months of May to August, or 8 hours if hire date is in the months of September to December.) As hourly

employees, they receive regular pay during scheduled breaks in line with the CDC operations calendar. No vacation leave carries over.

- All Other Employees—Accrual rates are for a 1.0 full-time equivalent (FTE) working 40 hours per week. Those working less than 40 hours (but 30 or more hours per week) accrue at a percentage rate based on the FTE established by letter of engagement or Personnel Action Form.
 - During the first 12 months of employment, 3.5 hours accrue per pay period in a 24-pay-period payroll system.
 - After 12 months, 4.5 hours accrue per pay period in a 24-pay-period payroll system.
 - After 24 months, 5.5 hours accrue per pay period in a 24-pay-period payroll system.

Employees may only use previously accrued vacation time. Otherwise, the employee must use Leave without Pay for planned absences.

Vacation leave must be used in the calendar year in which it is accrued; however, up to 80 hours may be carried over to the next year. Accrual rate will change in first full pay period following the employee's anniversary of hire date.

5.3 Sick Leave

This benefit provides compensation for absences due to temporary inability to work. Sick leave may be used for absence due to illness or injury, medical appointments, temporary disability, caring for a member of the immediate family, or attending to a death in the immediate family. **Sick leave days may not be used for any other purpose.**

Accrual rates are for a 1.0 full-time equivalent (FTE) working 40 hours per week. Those working less than 40 hours (but 30 or more hours per week) accrue at a percentage rate based on the FTE established by letter of engagement or Personnel Action Form.

Full-time employees accrue sick leave according to the following schedule:

- During the first 12 months of employment, 3.5 hours accrue per pay period in a 24-pay-period payroll system.
- After 12 months, 4.5 hours accrue per pay period in a 24-pay-period payroll system.
- After 24 months, 5.5 hours accrue per pay period in a 24-pay-period payroll system. Accrual rate will change in first full pay period following the employee's anniversary of hire date.

Sick days not used may be accumulated up to a maximum of ninety-one (91) days. Sick leave can be advanced by the Head of Staff up to an amount equivalent of one year's accrued sick leave with doctor's statement of need and an agreement by the employee to return to employment at the end of that leave. Beyond that, the individual must request to be placed on leave without pay.

FPC will not pay compensation for any sick leave accrued but not used. Upon termination (voluntary or involuntary), an employee has no claim for pay *in lieu* of unused sick leave.

Payment of normal compensation for each sick day taken shall be made on the customary dates for regular service payments.

After three consecutive days of sick leave, the Church may require a physician's certification of illness before returning to work. If a staff member anticipates the need for sick leave, the time must be approved by the Head of Staff or CDC Director as far in advance as possible so that the workload is not seriously jeopardized.

5.4 Personal Leave

Personal leave of up to 24 hours per calendar year will be granted to employees working 30 or more hours per week to allow employees paid time off, when approved by the supervisor, to attend to personal business. Personal leave is non-cumulative. No compensation shall be paid for personal leave not taken. It is the responsibility of each employee to schedule personal leave to the extent possible.

Personal leave will be credited on January 1 of each year for the coming year.

5.5 Time for Voting

Adequate time off (up to two hours) for voting on an Election Day will be allowed if needed and scheduled and approved by the supervisor.

5.6 Parental Leave

Employees who have completed one year of service and are covered by the Benefits Plan of the Presbyterian Church (U.S.A.) are entitled to parental leave immediately preceding and following the arrival, birth, or adoption of a minor child. Such leave shall not exceed three months. After three months an employee may be removed from employment and replaced.

The Head of Staff may grant extensions with the concurrence of the Personnel Committee but only under unusual circumstances. It is anticipated that the employee will return to work at the conclusion of the parental leave. Parental leave may not be used as terminal leave without the prior approval of the Head of Staff and concurrence of the Personnel Committee or because of unusual extenuating circumstances.

The employee should apply for the leave at least one (1) month in advance of the expected arrival of the child and specify the amount of leave time desired. This application should be in writing and submitted to the Head of Staff and the Personnel Committee.

The leave may include a period in advance of the expected arrival of the child. Such leave may not exceed 12 weeks in total for the birth. The leave normally should be unbroken except for any periods of absence caused by illness or disability.

FPC reimburses the first six weeks of the parental leave at the employee's regular compensation. The employee may then use sick leave and vacation leave. Once that is exhausted and if the employee wishes to continue on parental leave up to the 12 weeks, the employee will be on leave without pay.

Benefit coverage and service credit continues during the entire leave. FPC will continue to pay its contribution toward the cost of benefits during an authorized leave period. Upon completion of a period of parental leave of 12 weeks or less, the employee is entitled to return to the same position. Generally, the position will not be filled during the leave, except on a temporary basis. However, if FPC's Head of Staff and Personnel Committee deem it necessary to fill the position permanently, a different but comparable position and pay will be offered to the employee returning from parental leave. Any pay increase action for which the employee would become eligible while on leave is effective upon the return from parental leave.

Employees may not bring infants or children to work with them on a regular basis unless suitable arrangements are made for childcare elsewhere in the building. Employees may not be the primary caregivers for their child during working hours.

5.7 Leaves of Absence with Pay

If prompt notice is provided to the Head of Staff, a leave of absence with regular pay is available to employees working 30 or more hours per week under the following circumstances:

- For regular training in U.S. Armed Forces (up to two weeks annually);
- Jury duty;
- Marriage of an employee who has been employed by the Church for one year or longer (up to three days);
- Bereavement leave: In case of death in the immediate family (husband, wife, partner, parent, parent-in-law, step parent, brother or sister-in-law, child, step child, grandchild, brother, sister, grandparent) the employee will receive full pay for the absence from the day of death up to and including day of burial. This leave should not exceed four working days. Time off work to attend a funeral may also be counted as personal leave to be arranged in consultation with the employee's supervisor and Head of Staff;
- Upon agreement of the employee, the Head of Staff, and Personnel Committee and the approval of Session, a leave of absence may be granted for other personal reasons.

These are recorded in the Other category on the timesheet and under "Administratively Approved Leave" in the payroll system.

5.8 Leaves of Absence without Pay

If prompt notice is provided to the Head of Staff, leave of absence without pay may be provided by the Session under the following circumstances:

- For military service: Upon return, the employee will be returned to employment in accordance with United States law;
- Upon agreement of the employee and the Head of Staff as to duration, a leave of absence may be granted for other personal reasons.

6. Performance Expectations and Evaluation

6.1 Ongoing Performance Review

Each employee will participate in ongoing discussions with the Head of Staff or CDC Director to review goals and effectiveness. The purposes of this review are to maintain lines of communications among the staff and their supervisors, to identify changes in the work situation, and to encourage the maintenance of an effective organization. Such a review should occur at least at the end of every six months of service but may be more frequent as needed by staff member and/or supervisor. During the periodic discussions, work performance will be noted, and the work plan will be adjusted as needed.

6.2 Annual Performance Review

Annually the staff member and supervisor will assess the accomplishment of previous performance goals and establish a new set of performance goals for the year ahead, based upon job description, work plan, and expected level of performance. Comments from the periodic reviews will be incorporated into the annual performance report. The supervisor may report to the Personnel Committee, and as needed, the Personnel Committee may review the evaluation report. A copy of the annual performance review report will be placed in the employee's personnel file.

The Head of Staff will conduct an annual performance review with other clergy using the method outlined above.

The Personnel Committee will recommend to Session an annual review process to evaluate Head of Staff performance.

Modifications of the review process will be the responsibility of the Personnel Committee and the Head of Staff, with Session approval.

6.3 Conflict Resolution

All staff members shall strive to conduct themselves in a professional and supportive manner in all of their dealings with other individuals. Within the workplace, this implies that the individual treats others in a collegial fashion respecting their beliefs, perspectives, and personal concerns. At the same time, it is recognized that disagreements do arise. FPC desires to handle interpersonal disputes internally. As much as possible, it is appropriate that these matters should be dealt with in a direct,

private, and non-confrontational fashion. If this does not resolve the issue, then the advice of the supervisor should be sought. If the issue is still unresolved, then the matter should be brought to the Head of Staff. If the conflict is with the Head of Staff, the staff member may speak with the Personnel Committee and request a conference with the Personnel Committee and the Head of Staff.

FPC expects similar behavior in dealings with congregants. Often a conciliatory approach will resolve even the most extreme conflicts. The staff member should make every effort to take the lead in resolving potential conflicts.

6.4 Progressive Discipline

Generally, the following progressive steps will be taken to manage performance issues.

- Step 1: Counseling and verbal warning—creates an opportunity for the immediate supervisor to schedule a meeting with an employee to bring attention to the existing performance, conduct or attendance issue. The supervisor should discuss with the employee the nature of the problem or the violation of company policies and procedures. The supervisor is expected to clearly describe expectations and steps the employee must take to improve performance or resolve the problem. Within five business days of this meeting, the supervisor will prepare written documentation of a Step 1 meeting. The employee will be asked to sign this document to demonstrate his or her understanding of the issues and the corrective action.
- Step 2: Written warning and performance improvement plan—involves more formal documentation of the performance, conduct or attendance issues and consequences. The supervisor and Head of Staff or Chair of Personnel Committee will meet with the employee to review any additional incidents or information about the performance, conduct or attendance issues as well as any prior relevant corrective action plans. Management will outline the consequences for the employee of his or her continued failure to meet performance or conduct expectations. A formal performance improvement plan (PIP) requiring the employee's immediate and sustained corrective action will be issued within five business days of a Step 2 meeting.
- Step 3: Recommendation for termination of employment

FPC reserves the right to combine and skip steps depending on the circumstances of each situation and the nature of the offense. Furthermore, employees may be terminated without prior notice or disciplinary action and with no pay in lieu of notice.

6.5 Termination

If an exempt staff member is terminated, the termination must be approved by the Session, and notice must be in writing. The Head of Staff may place an employee on administrative leave, pending approval of the termination by the Session. The immediate supervisor is responsible for decisions regarding termination of non-exempt staff.

The CDC Director may terminate a CDC staff member with the assent of the Chair of the Personnel Committee and the CDCAC.

As an at-will employer, FPC may terminate an employee with or without notice for any reason (for example, unsatisfactory performance; refusal to do work within his/her position description; repeated unexcused absences; repeated tardiness; incompetence; or illegal, dishonest, or unethical conduct) or for no reason, consistent with state and federal law. In the case of a termination, no severance allowance will be paid, but employees will receive the cash equivalent of their unused earned vacation.

For dissolution of a pastoral relationship, see the Form of Government in *The Book of Order*.

In the event of a termination due to budgetary limitations, reorganization, or other circumstances arising out of no fault of the employee, a severance allowance based on length of service may be granted at the discretion of the Session.

APPENDIX A—SafeHiring Solutions Procedure for Obtaining Background Checks (non-CDC staff)

NOTICE REGARDING BACKGROUND INVESTIGATION

A consumer report (background screening report) and/or an investigative consumer report which may include information obtained through personal interviews concerning your character, employment history, general reputation, personal characteristics, police record, education, qualifications, motor vehicle record, and/or mode of living may be obtained in connection with your application for and/or continued employment, contract for services or volunteer services with the FIRST PRESBYTERIAN CHURCH OF SANTA FE. **A consumer report and/or an investigative consumer report may be obtained at any time during the application process or during your employment, contract for services or volunteer services with the FIRST PRESBYTERIAN CHURCH OF SANTA FE.** You have the right, upon written request made within a reasonable time after receipt of this notice, to request disclosure of the nature and scope of any investigative consumer report. Please be advised that the nature and scope of the most common form of investigative consumer report obtained with regard to applicants for employment is an investigation into your education and/or employment history conducted by Safe Hiring Solutions LLC, P.O. Box 295, Danville, IN 46122 888-215-8296.

AUTHORIZATION

By signing below, I, _____, hereby voluntarily authorize the FIRST PRESBYTERIAN CHURCH OF SANTA FE to obtain either a consumer or an investigative consumer report about me from a consumer reporting agency and to consider this information when making decisions regarding my application for and/or continued employment, contract for services or volunteer services at the FIRST PRESBYTERIAN CHURCH OF SANTA FE. I understand that I have rights under the Fair Credit Reporting Act, including rights discussed above, and have received a Summary of My Rights Under the FCRA. This report may be delivered in either written or electronic form.

Print Name (last, first, middle)
Number

Social Security

Date of Birth (MM/DD/YYYY)
State

Drivers License Number

Drivers License

(For ID Purposes Only)

Any other names I have been known by: _____

Current Address: _____

Previous Addresses (Last 7 Years) _____

Signature

Date

APPENDIX B—Drug and Alcohol Testing

In order to assure the rights and confidentiality of both FPC and its individual employees, the administration of drug and alcohol testing shall be conducted in a standardized and consistent fashion as soon as it is determined by the Head of Staff and/or CDC Director that testing is needed.

1. The Head of Staff and/or CDC Director will document in writing the reason for the decision to institute drug or alcohol testing. The Head of Staff and/or CDC Director will inform the individual employee(s) of the decision for drug or alcohol testing.
2. The Head of Staff or CDC Director will arrange immediate transportation and accompany the individual(s) to be tested to the collection site and accompany the individual(s) back to the work site.
3. FPC shall compensate the individual(s) at his/her established pay scale for time spent in travel to and from the collection site and time spent at the collection site.
4. The individual(s) tested shall provide valid photo identification and sign the necessary laboratory and chain-of-custody forms at the time of administration of the specimen collections.
5. The individual(s) will provide urine and breath analysis specimens according to the established protocols of the collection site.
6. FPC shall be responsible for the costs of test collection and analysis.
7. Refusal by the individual(s) to submit to testing will be considered equivalent to a positive result thus subjecting the individual(s) to immediate dismissal from employment.
8. The Head of Staff, the CDC Director if applicable, and the individual will review the results of the drug and alcohol testing. If the results are reported as positive, the employee will have the right to provide a valid explanation for the test result. If the explanation is found to have merit, the employee may be reinstated. Alternatively, additional testing may be requested. Additional review and/or testing will be provided at the individual's expense and must include documentation from a reliable and certified drug and alcohol testing facility.
9. When a positive test without valid explanation has been confirmed, the individual is subject to immediate termination of employment.
10. All information received through a drug or alcohol testing program is confidential. Access to this information is limited to the Head of Staff, CDC Director, and Chair of the Personnel Committee. If findings indicate termination, the Session will be advised of the test results so that they may make an informed decision about termination.

Unless required by law, this information will not be released to any third party without the written authorization of the tested individual. Written records will be destroyed three years after termination of employment.

APPENDIX C—Medical and Counseling Assistance for Alcohol, Drug, and Tobacco Abuse

Substance Abuse and Mental Health

The Board of Pensions medical coverage includes the Employee Assistance Program (EAP) that is administered by CIGNA Behavioral Health (866.640.2772), or www.cignabehavioral.com. This provides a confidential way to get help coping with life's challenges. A participating employee or family member may call anytime to talk about stress, relationships, family issues, emotional health concerns, career concerns, financial concerns, legal issues, exercise, diet and nutrition, weight loss, or substance abuse issues.

EAP offers six free face-to-face sessions per identified issue with an in-network counselor. See the pensions.org website for all benefits. Each member's account will be monitored to insure the combined member liability in co-pays is not greater than the overall plan limit.

Tobacco-Free Living

If a member wants to quit smoking or using other tobacco products, benefits under the Medical Plan of the Presbyterian Church (U.S.A.) include the following:

- coaching by tobacco treatment specialists (for active members and eligible family members*)
- coverage for prescribed smoking cessation medications (for active members and their eligible family members)

Ignite Your Life Coaching

For active members, Ignite Your Life coaching offers a program, Breathe Easy, to help change habits and become tobacco-free. Offered by tobacco treatment specialists, this six-week coaching program can help members find the motivation to kick the tobacco habit for good.

Whether members prefer to be coached online or by phone, Ignite Your Life will work with members to help them meet their goal of tobacco-free living.

To access Ignite Your Life coaching,

- go to **calltohealth.org** and click on Ignite Your Life; or
- call **866-592-3624**.

Coverage for Prescribed Medications

For active members or eligible family members, certain prescription generic or formulary smoking cessation medications are 100 percent covered with a prescription from your physician. Members can simply show their prescription ID card when they pick up their prescription; no copay is required.

APPENDIX D—Personnel File Checklist (following)

Employee Name: _____

Department: _____ Date of Review: ____/____/____

Review Completed by _____

SECTION 1: File Access and Closure (upon termination)

Left side – closure at end of employment

- Employee resignation or termination
- Copy of final paycheck
- Property return form (keys, parking pass, etc.) **NEEDED**
- Other

Right side – access

- Access record
- Requests to review personnel file (must be written)
- Personnel file checklist
- Date: _____
- Date: _____
- Date: _____
- Other

SECTION 2: Employment, Performance and Training (for CDC, this part is kept in Director's Office)

Left side – employment

- Emergency contact information (only most recent form is kept)
- Personal data form, including changes
Date: _____
Date: _____
Date: _____
- Copy of driver's license, if required for the position
- Orientation checklist **NEEDED**
- Signed receipt of HR Manual and employment-at-will statement **NEEDED**
- Employment application
- Résumé
- Cover letter (if applicable)
- Education verification
- Employment and personal reference checks
- Other

Right side – performance development

- Position descriptions (most recent first)
Date: _____
Date: _____
Date: _____
Date: _____
- Performance evaluations (most recent first)
Date: _____
Date: _____
Date: _____
Date: _____
- Record of disciplinary action—verbal and written warnings—if applicable
- Letter of engagement and/or contract, signed
- Tuition assistance/training requests
- Documentation of training

- Documentation of certification and/or license
- Other

SECTION 3: Payroll

Left side – withholdings and deductions

- W-4 Employee Withholding Allowance Certificate (most recent first)
Date: _____
Date: _____
Date: _____
- Paychex enrollment form
- Other deductions and withholdings

Right side – pay

- Personnel action forms
Date: _____
Date: _____
Date: _____
Date: _____
Date: _____
- Pay history
- Paychex direct deposit enrollment/change forms
Date: _____
Date: _____
- Other

SECTION 4: Benefits

Left side - enrollment

- Copy of Board of Pensions benefits enrollment
- OR
- Benefits declination form
- Retirement Savings Plan signup form
- Beneficiary designation form
- Other

Right side – correspondence and other forms

- Other Board of Pensions forms

- Board of Pensions correspondence

- Other

SECTION 5: Confidential and Medical Files

Left side – confidential

- Documentation of investigations
- Lawsuit or DOL/EEOC investigation correspondence
- EEOC and Affirmative Action Data
- Background check
Date: _____
Date: _____
Date: _____
Date: _____
- OSHA forms
- Employee incident report
- Other

Right side – medical

- Disability forms
- Workers' Compensation claim forms
- Accommodation requests
- Drug testing results
Date: _____
Date: _____
- Other

Files in Other Locations

In separate files:

- USCIS I-9 Employment Eligibility Verification combined file
- Timesheets filed in one binder by year