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# Best Practices for Personnel Committees (HR Teams)

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Explore Five (5) important areas

Presented Patti Berner & Rev. Traci Smith



# Disclaimer

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*Patti and Traci are speaking out of their own professional experience working with a variety of different churches from their respective consulting work and experience. Their opinions do not represent the views of any particular church or denomination with which they are affiliated. All advice is for informational purposes and is not legal advice. Attendees should check with employment attorneys in their state as well as denominational authorities for guidance that is appropriate to their contexts.*

Q. Who can benefit from this information?

A. Small to medium size churches (religious organizations) with decentralized HR

Pastor, Reverend, Head of Staff

Accountant, payroll person

Office manager, administrator

Lay leadership

Anyone who has HR responsibilities, often part time

# Goals

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1. To have at least one (1) idea to implement immediately.
2. To have a few (1-3) HR improvements that can be implemented soon.
3. To set some longer term changes that can have lasting effects.

Considerations: protection of people, liability, legal compliance, etc.

***ACTION: see some ideas to get you started at the bottom right of several slides***

# Top 5 Best practices and how they relate to important tasks like recruiting (hiring), managing, and tackling “sticky situations.”

1. Add talent to your internal team! (don't go it alone)
2. Document, document, document! (plus 4 key items you should have)
3. Embrace technology, (ex. cloud-based files, calendaring)
4. Addressing problems immediately
5. Grace for all, (you too!) - especially with sticky situations (spoiler alert, ignoring them is not the best strategy)

# Where do we start?

## 1. Team: “You’re not alone!”

HR Team of volunteers

Higher entity (city or region you report to) ex. Presbytery, Synod, Classis, Region

HR-Pastor (Head of Staff) Relationship and HR team

Organization’s leadership body

Internal People: Staff (W-4’s) vs. Contractors (W-9’s) ex. Admin and/or Payroll/CPA

Consider like-sized organizations like yours to “tap” perhaps out of state or out of your region.

***ACTION: Think you’re alone? Pick one of the above and email a “help request” now!***



# Team approach - how it can help

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## Recruiting

- a) Review, revise past job postings, descriptions, (keep similar format)
- b) Ensure the person “closest to the job,” be involved in the recruitment phase

## Hiring (applicant turned employee or contractor)

- Automate onboarding with docs (W-4 or W-9, I-9, offer/agreement letter, etc.) - involve admin, head of staff, lay leadership, etc.

## Common sticky situation (two examples):

- a) “That’s not in my job description!”
  - Involve all parties to start the conversation, find agreement, rewrite
- b) “I was told I was to earn X\$ and receive paid holidays!”
  - Going forward, offer letters for all
  - Annual review (with all involved parties, minimum 3) of employee/employer or client/contractor agreement (acknowledgment form)

# HR & Pastor Relationship

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Confidentiality is critical!

Repeating monthly meeting (plus ad hoc.)

Accessibility (text, call, email, live, etc.)

Play to Pastor's strengths, fill in the blanks (support them to do their best)

***ACTION: Are you (HR) meeting consistently with your Head of Staff?  
No? Send a recurring Google Calendar invite now!***

# HR Team

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- **Written “HR Team Job” expectations?** (All functions covered? Payroll, Comp & Benefits, Talent Life-Cycle: recruitment, onboarding, T&D)
- **Character traits:** discreet, professional, compassionate, grace-filled
- **Three or more members**, diverse (sex, age, industries, experience, etc.)
- **Ability to meet** timely, regularly, short notice (rare); map out a calendar of anticipated meetings in the year
- **Technology savvy** (not all but more than one ;))
- **Term Limits**, whenever possible
- **Part of Leadership team**

***ACTION: Don't have one? Add “Create an HR Team” to your “to do” list.***

## 2. Document: four documents you all should have NOW

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1. New Hire Packet
2. HR Manual
3. Job Descriptions
4. Annual Acknowledgement Form

Links forthcoming ;) Don't panic!

***ACTION: Remember, something is better than nothing.  
You can always revise as you begin to use these documents.***

## 2. What else do you document?

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Document EVERYTHING!

### Recruiting (hiring)

- Ex. Use sheets to corral answers to behavioral based interview questions ( and to compare applicants); can refer to info for candidate references

### Managing

- Ex. \*HR manual, anyone? Plus, refer back to documented \*job description when “whose job is it?” arises

### Tackling “sticky situations”

- Ex. It’s hard to remember who said what, where there’s agreement or not. Have a MOU.

*\*see next slide(s) to learn more*

# Why document?

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Lots of reasons but definitely for:

- **Continuity** - people move on, especially volunteers
- **Clarity** - it's hard to remember specifics but if it's written down well... ;)
- **Conversation** - use it as a tool to begin and foster a conversation; this is especially true of job descriptions

# New Hire Packet

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Should make the individual and the company feel comfortable entering into working relationship:

- Offer letter (title, supervisor, pay rate, start date)
- Job description (clear expectations and benefits)
- HR manual and addendums (link and hard copy)
- Required documents ex. W-4 or W-9, I-9, IDHR-SHP training

***ACTION: Don't have the above? Start with the person &/or their direct supervisor.  
Still nothing in writing? Don't sweat it - re-create based on what you know now.***

# HR Manual

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Some key components include

- Employment conditions, compensation
- Employee Relations
  - Grievance Procedure
- Benefits
  - Unemployment, jury duty, FMLA, etc
  - PTO, holidays
- Technology & Internet usage

***ACTION: \*see excerpts (sample content) of an HR Manual, at end of slide presentation***



# Job Descriptions vs. Job Postings

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## Job Postings

- Sell, attract candidates
- General, Highlights fun, exciting parts, ex. week day work (no Sat/Sun)
- Targeted to audience

## Job Descriptions

- Inform, seek clarity
- Detailed, provides specifics ex. Max 24 hr work week, 9-12 M-F
- Tool to confirm, secure agreement

***ACTION: revise your latest job posting to truly attract the right person***

# 3. Embrace Technology

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- HR Team: can split up recruiting/hiring tasks, ex. do video interviews, collaborate on docs
- Regularly scheduled (auto-remind) meetings (HR rep & Pastor) and team members
- E-Files (cloud-based, accessible, restricted access)
- Templates, samples, resources - work smarter
- Just say “NO!” to emailed attachments forever more and go for “live” working documents

# More on technology - Calendaring & Scheduling

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## Annual Calendar

- February “annual sign-off”; state compliance
- August COLA review
- October annual budgeting

Automate Head of Staff - HR Mtgs, recurring monthly

HR Team-Leadership monthly (min. quarterly) reporting

***ACTION: What can you do today to positively impact tomorrow?***

# Annual Sign-off (acknowledgment form)

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Automate this, if possible

Use same format for W-4 v W-9 (a couple key differences)

Job descriptions- update, revise, with help from both individual and direct supervisor

Compensation- accurate? Appropriate for responsibilities? Competitive? When was the last increase?

State requirements met? Ex. IDHR-SHP training

Complete staff (or contractor) file?

***ACTION: See link to template at end of presentation.***

# *Deeper dive: W-4 (employee) vs. W-9 (contractor?)*

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Which designation are they? Who decides the work? How much flexibility of work, schedule, process? Where is the work done? Virtually, in the church, at one's home, hybrid?

Once decided, how does task (work) assignments, progress and completion get communicated to lay leadership and Head Of Staff? (Org chart anyone ?!) 1-1s, schedules meetings.

Annual acknowledgements by HR team and payroll

***ACTION: Suspect someone is miscategorized? Don't delay. Meet with all appropriate parties soon.***

## 4. Addressing Problems Immediately

### Some examples:

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#### Managing staff:

- **Quick check in:** ask *“On a scale of 1-10, how do you feel about your job?”* Do with vendors, contractors too. Waiting to see how things are at an annual review is already too late ;)
- Ex. You had a staff chat, something wasn't quite right. Pause. Ask. *“Hey, I sensed that perhaps something's “off.” I'd like to learn more - can you clue me in?”* Can't do it immediately. Get your PA Siri to remind you. Don't let it slip.

***ACTION: Who do you need to check in with? Set a task to do it this week!***

# 4. Addressing Problems Immediately (more)

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Recruiting/hiring process:

There's a fine line when attracting staff to you...

- Ex. During a follow up call, an applicant shares they will be juggling one or more part-time jobs. Explore now! Once they're hired, well... better to flush out the situation now than make an assumption "It'll all work out."

Succession/Hiring Planning:

- Ex. "So you'll be graduating in May (6 mos from now) - what are your plans then?" {Add this to your Google calendar as a recurring event; could be "casual" vs. formal conversation.}

# 5. Embrace Grace

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Defined as:

Dictionary.com: forgiveness, charity, mercifulness, lenity, leniency, reprieve.

Merriam-Webster.com: unmerited divine assistance given to humans for their regeneration or sanctification; MERCY, PARDON

Why do I highlight this?

Well... it's a BIG deal that you're responsible for HR - THANK YOU! This is a BIG job that not all will or can say "yes" to but you did! Plus, whenever possible, you (we) will want to show grace to others.



# 5. More on Embrace Grace...

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We ALL make mistakes. This is the “people” side of the organization after all.

Gain confidence and seek support: refer back to best practices 1-4 (Team Approach, Document, Technology, and Immediate Problem Response.)

Update, revise, re-write. Documentation will likely continue to be fluid.

Technology will change, adapt - don't make yourself crazy - use what works for you!

***Perhaps most importantly***, be a knowledge seeker, seeking help from great resources like PRC for example ;)

# Links to sample resources:

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[Annual Calendar](#)

[Job Descriptions](#)

[HR manual excerpts](#)

[Annual acknowledgement form](#)

[IRS 2023 Form W-4](#)

[Sexual Harassment Prevention Training](#) - IDHR (Illinois Dept. of Human Rights)

# Thank you!

Need (want) more? We're ready ;)  
See contact information below.

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